iPipeline User Guide

For use with OneAmerica eApps

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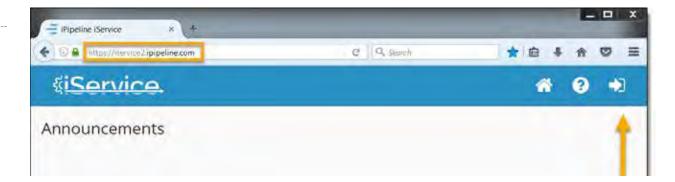
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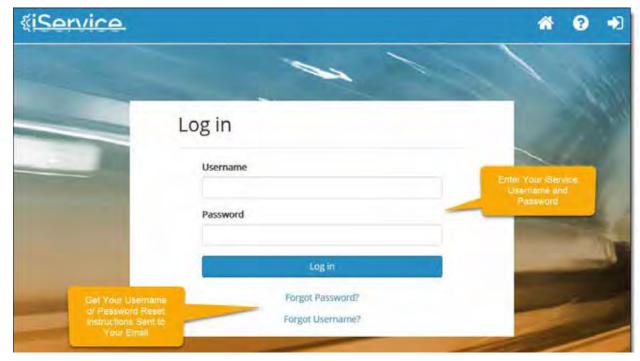
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Access iService

1. Navigate to **iservice2.ipipeline.com** and click the arrow button in the top right.



2. Log into the site with your iService credentials.



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Site Navigation

1. Click the Home icon to return to the **Home** page.

- **2.** Click the User Management icon to complete the following actions:
 - Create a new user
 - Edit a user's details
 - Clone a user
 - Disable a user
 - Reset a user's password
 - Resend verification to a pending user
 - Re-enable a disabled user
- **3.** Click the Settings icon to configure the following:
 - Annuity Profile
 - Forms Profile
 - iGO Profile
 - Term Rates Profile
 - Product Profile
- **4.** Click the Welcome icon to be directed to training resources and iPipeline support.

<i>«iService.</i>	*		00	Welcome +
Home	0	2	3	4
Announcements				
Announcement				
This is a test announcement from a BGA user				
EFFECTIVE: 10/27/2016				

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User Management

You can manage users, and users' settings, by clicking the User Management icon in the top navigation.

Create a New User

- **1.** Create a new user by clicking Create User on the User Management page.
- **2.** Fill in all required information, select the user's role(s), and click Save.



New User	
First Name	Last Name
Tont	Rogers
Email Address	Company Name or GAID
tragers@comcast.com	1123
Azrin	
BGA Writer Read & update company application settings in IS	evice.
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Edit, Clone, Reset Passwords, & Disable Users

You can edit, clone, reset a password, or disable a user by clicking the symbol to the right of the user and making the appropriate selection.

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Mamo	the name 🕫	Final 0	Company/GM	D.	
BGA User	bpalacio2	gpalacio@totalperform.com	iPipeline		0
Admin User	btest3	mgodoy@totalperform.com	iPipelíne	Edit Clone Reset Password	0
				Reset Pass Disable	word

Re-Enable an Inactive User

Re-enable an inactive user by clicking the symbol to the right of any inactive user and selecting **Enable**.

Jser Manag	ement 🧧	reate User	Seaton	Q
Name	Username =	Email é	Сотрыту/С	SAID
BGA user	rtest	test@test.com	6002	inactive 😨
BGA test user	rtest3	test@test.com	6002	Clone Resend Verification

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Resend Verification to a Pending User

Resend verification to a pending user by clicking the symbol to the right of any pending user and selecting **Resend Verification**.

Jser Manag	ement 🧧	reate User	Seaton	c
Name	Osemane -	Email e	Сотрысу/С	:AID
BGA user	rtest	test@test.com	6002	inactive 🔅
BGA test user	rtest3	test@test.com	6002	Clone Resend Verification Disable

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Configure Your Profile

You can select your applications, set locations, and add carriers within **Profile Configuration**.

Access Profile Configuration

1. In iService, select **Forms Profile** from the settings drop down on the Home page.

This displays a separate configuration interface.

2. Expand Profile Configuration from the left menu.

«iService	😭 😁 🐝 Welcome -
Home	Profile Settings Annuity Profile
	Forms Profile
Announcements	iGO Profile Term Rates Profile
Announcement	Product Profile

N.	General Properties	
Select Profile Test Profile Profile Configuration Central Properties Select Applications Select Locations Select Locations Select Default Location Couble Variable Products Select Suppliers	Profile ID: 11051 Profile Name: Test Profile Defauk Profile: Image: Imag	
FormsPipe Configuration F Customer Kits Configuration F Go Configuration F Product Information F LifePipe Configuration F Integration Experience F		

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General Properties

From the **General Properties** screen (**Profile Configuration > General Properties**), you can set your profile name, and set a redirect page for when your users timeout.

Make modifications to any of the below fields and click **Save**.

- 1. This field displays your profile ID.
- 2. Modify your profile name.
- **3.** Enter the URL of the page you would like users to be redirected to in the case of a session timeout.
- **4.** Select your preferred profile language (Chinese, English, Japanese, Portuguese, Russian, Spanish).

	General Propert	its.		
Select Profile	Profile ID:	11051	0	-
Profile Configuration	Profile Name:	Test Profie		2
General Properties Select Applications Select Default Location Enable Variable Products Select Supplers	Default Profile: Timeout Redire Uri: Profile Languag Save	at I	MA	8
FormsPipe Configuration	-			
Customer Kits Configuration	*			
iGo Configuration	N			
Product Information	-			
LifePipe Configuration	F			
Integration Experience Configuration				

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Select Applications

From the **Select Applications** screen (**Profile Configuration > Select Applications**), you can see all the iPipeline tools you are subscribed to.

Caution: Adding or removing an application could cause a disruption if not done properly. Before adding or removing an application, please contact iPipeline support.

	Select Applications	
Select Profile	Save Chariges	
Test Profile	Application	Test Profile
Profile Configuration General Properties Select Applications Select Locations Select Default Location Enable Variable Products Select Surplers	IGoForms FormsPipe Product Information Agency Integrator DocFast LitePipe AnnutyPipe DataView	
FormsPipe Configuration	NeedsAnalysis CRM	8
Customer Kits Configuration	Licensing & Appointment	E .
kio Configuration	Al User Administration Data Wew User Administr PipePass	
LifePipe Configuration R Integration Experience R Configuration	Product Profile CaldStorm	

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Add Locations

From the **Add Locations** screen (**Profile Configuration > Add Locations**), you can see all locations in which you can do business.

1. Check locations to enable under the agency name (i.e. profile name).

2. Click Save Changes.

Hint: You can set a default location within **Profile Configuration > Select Default Location**.

	Select Locations	
Select Profile	Save Charges	All Locations
Test Profie	Location	Test Profile
Profile Configuration	AB	12 I
	ARW	0
 General Properties 	AK	3
 Select Applications 	AL	
Select Locations	AR	
Select Default Location	AZ	
 Enable Variable Products 	BC	2
Select Suppliers	BM	2
	BRB	0
FormsPipe Configuration	CA	
Customer Kits Configuration	CAN	
Go Configuration	co	(e)
	CT	v
Product Information	CYM	0
LifePipe Configuration	DC	
Integration Experience	DE	
Configuration	ECU	0

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Add Carriers for iGO, Forms, and Product Information

From the **Select Suppliers** screen (**Profile Configuration > Select Suppliers**), you can see a list of carriers on iPipeline's products.

Note: This list displays **ALL** carriers that use iPipeline's products. There may be an instance where you select a Carrier from this list, but it does not display in other configuration sections because you are not subscribed to that Carrier or line of business.

 Check suppliers to enable under the agency name (i.e. profile name).

2. Click Save Changes.

The selected carriers display as options for all products in which they are available.

	Select Sugglers		
Select Proble	Enter Chicken Internet Al Supplers 2		
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Prolife Configuration	Costructor	6	
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· Select Locations	Petiti Life Imprante Company	E1	0
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· Litert Southert	Principal Life Insurance Company	10	0
- FERRET	Process National Life Insurance Company	21	
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iGO Configuration

Select **iGO Profile** from the settings drop down to add products to iGO and manage agents' submission approver email.

(iService	🕋 🐸 🕰 Welcome -
Home	Profile Settings Annuity Profile Forms Profile
Announcements	iGO Profile
	Term Rates Profile
Announcement	Product Profile

Add Products to iGO

You can add products to iGO if you are an iGO subscriber.

1. Click **iGO e-APP Products** within **iGO Configuration** from the left menu.

The carriers that are available in iGO display.

2. Expand an available Carrier and check products to add under the agency name.

Hint: If a specific carrier is not available, it may be that the carrier is not currently available to you, or you may have to first add the supplier.

3. Click Save Changes.

iGO products should start appearing in iGO within 24 hours of being selected. Forms, Product Information, and Quoting all show immediately when changed in iService.

Prolife and Products Select Predict Stan Classes enica BGA Profil Product . OneAmerica BOA Profile Product Type **One-America** (8.7%) Asset Sased LTC Annull Annully Care Asset Based LTC Annuity Annuity Care R 12 Asset Eased 177, Vihole Life Assel Care Asset Based LTC Vitible Life Assel-Care I - Sergie Premam WL 10 Asset Care II - Non-Qualified Annuity - WL 10 on Alexies of Hair Askel Based LTC Vincle Life Q. 12 Asset Based LTC Vihole Life Asset-Care III - IRA. Incusty + WL 1 Asset Saset LTC Villele Life Asset-Care IV - Recorned Premium Vill. 10 Anial Based LTC Assume Indexed Annully Care:

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