

iPipeline User Guide

For use with OneAmerica eApps

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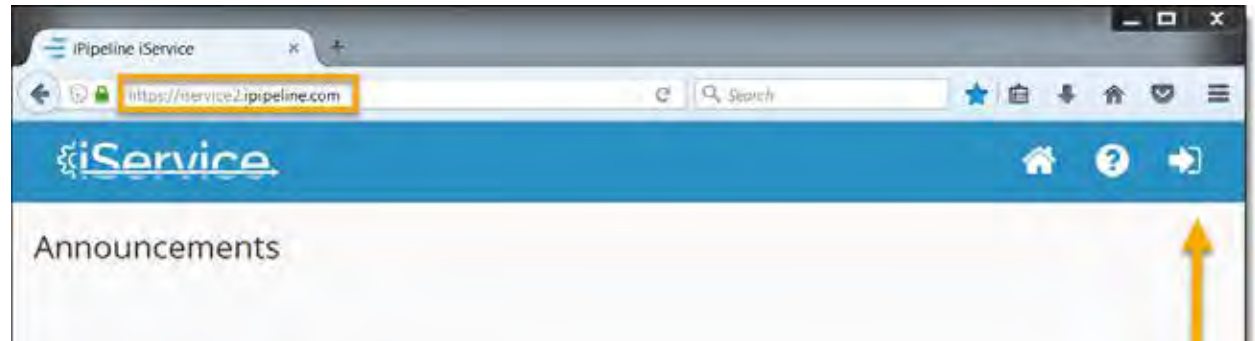
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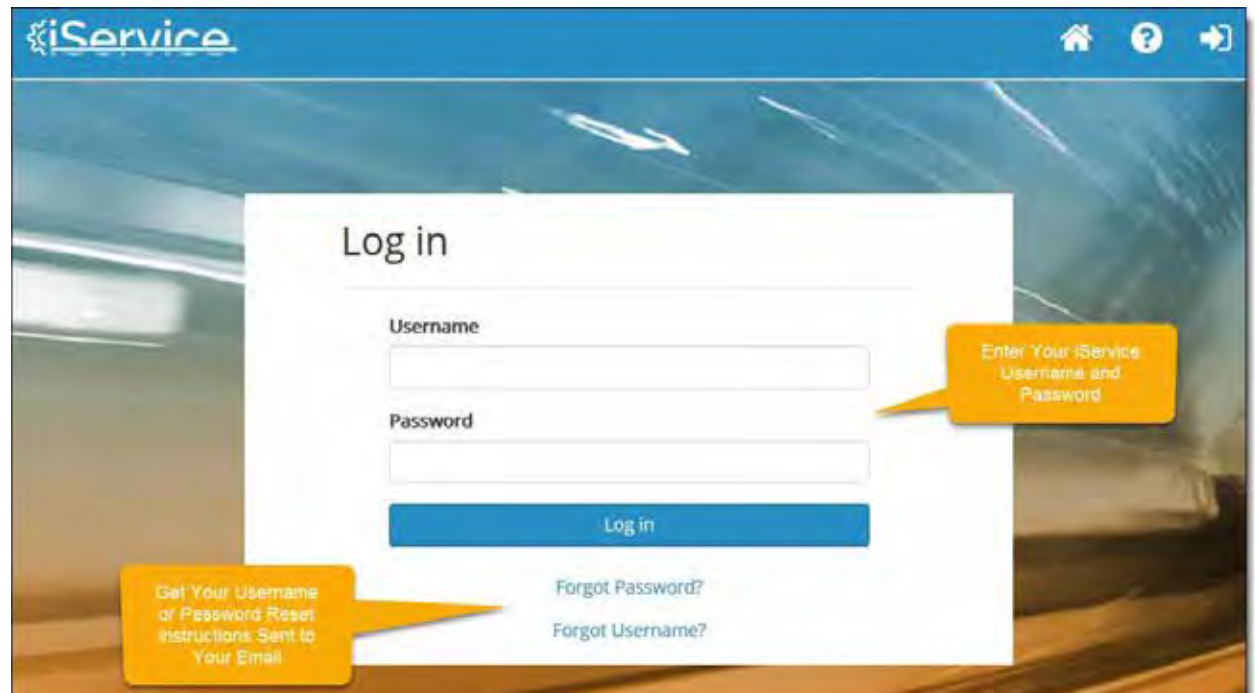
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Access iService

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



2. Log into the site with your iService credentials.

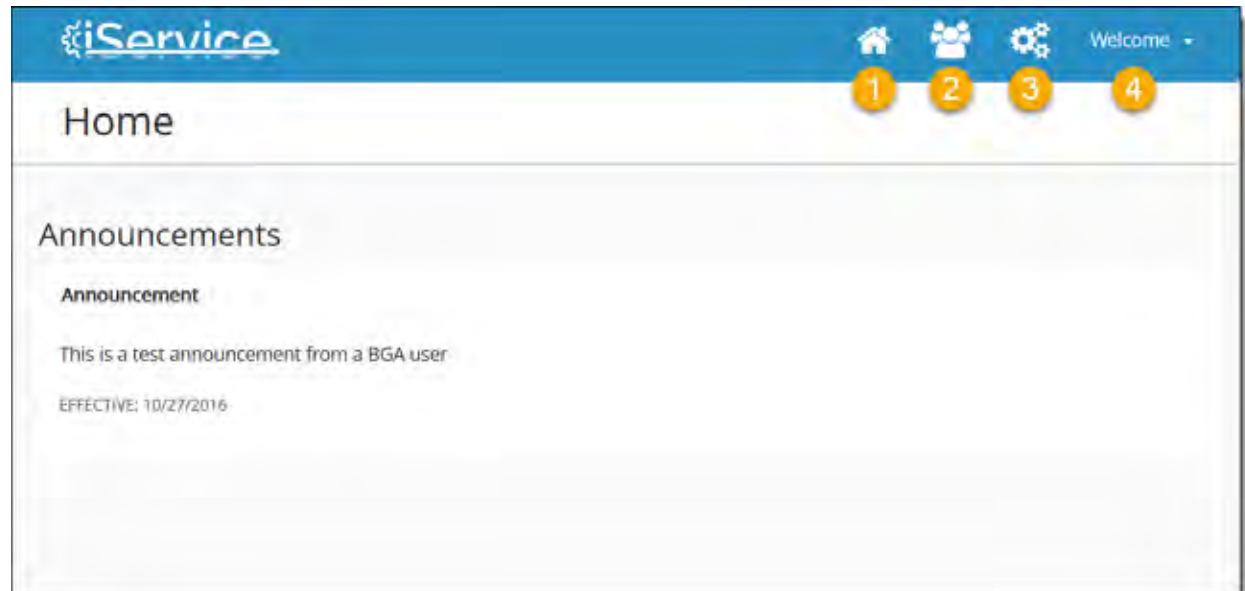


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Site Navigation

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.



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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.

The screenshot displays the iService User Management interface. At the top, the iService logo is on the left, and navigation icons (home, user management, settings) and a 'Welcome' message are on the right. The 'User Management' page has a 'Create User' button highlighted with an orange box. Below it, a 'New User' form is open, also outlined in orange. The form contains the following fields and options:

- Name:** BGA User, Admin User
- First Name:** Tom
- Last Name:** Rogers
- Email Address:** trogers@comcast.com
- Company Name or GAID:** 1123
- Role:** BGA Writer (ON), BGA Reader (OFF), BGA User Admin (OFF)
- Buttons:** Cancel, Save & New, Save

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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.



Re-Enable an Inactive User

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



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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**.



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Configure Your Profile

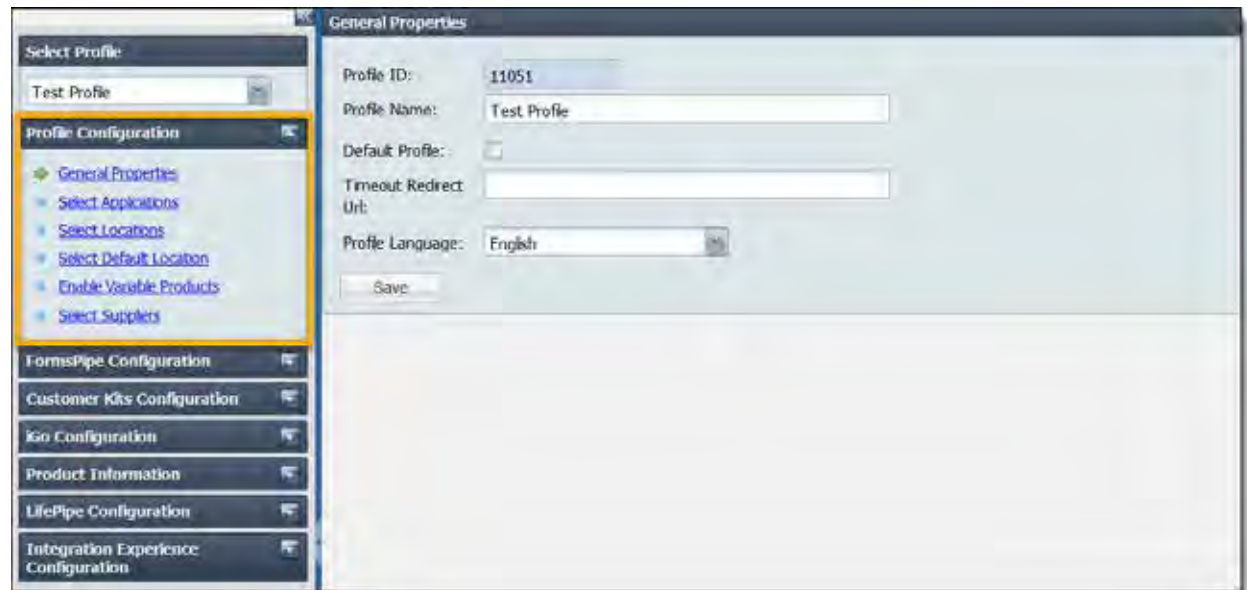
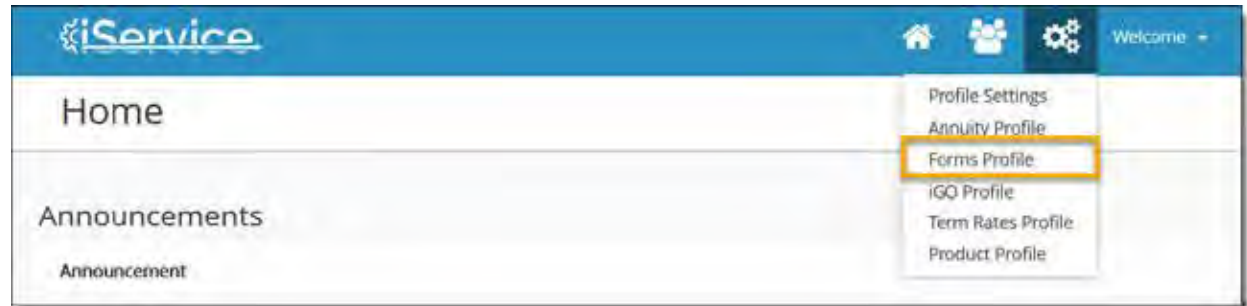
You can select your applications, set locations, and add carriers within **Profile Configuration**.

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.



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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).

The screenshot shows the 'General Properties' configuration screen. On the left, a sidebar contains a 'Select Profile' dropdown menu with 'Test Profile' selected. Below it is a 'Profile Configuration' menu with 'General Properties' highlighted by a yellow arrow. Other menu items include 'Select Applications', 'Select Locations', 'Select Default Location', 'Enable Variable Products', and 'Select Suppliers'. Further down are 'FormsPipe Configuration', 'Customer IGIs Configuration', 'iGo Configuration', 'Product Information', 'LifePipe Configuration', and 'Integration Experience Configuration'. The main content area on the right has the following fields: 'Profile ID' (11051), 'Profile Name' (Test Profile), 'Default Profile' (checkbox), 'Timeout Redirect Url' (empty text box), and 'Profile Language' (English). A 'Save' button is located at the bottom of the main content area. Numbered callouts 1-4 point to the Profile ID, Profile Name, Timeout Redirect Url, and Profile Language fields respectively.

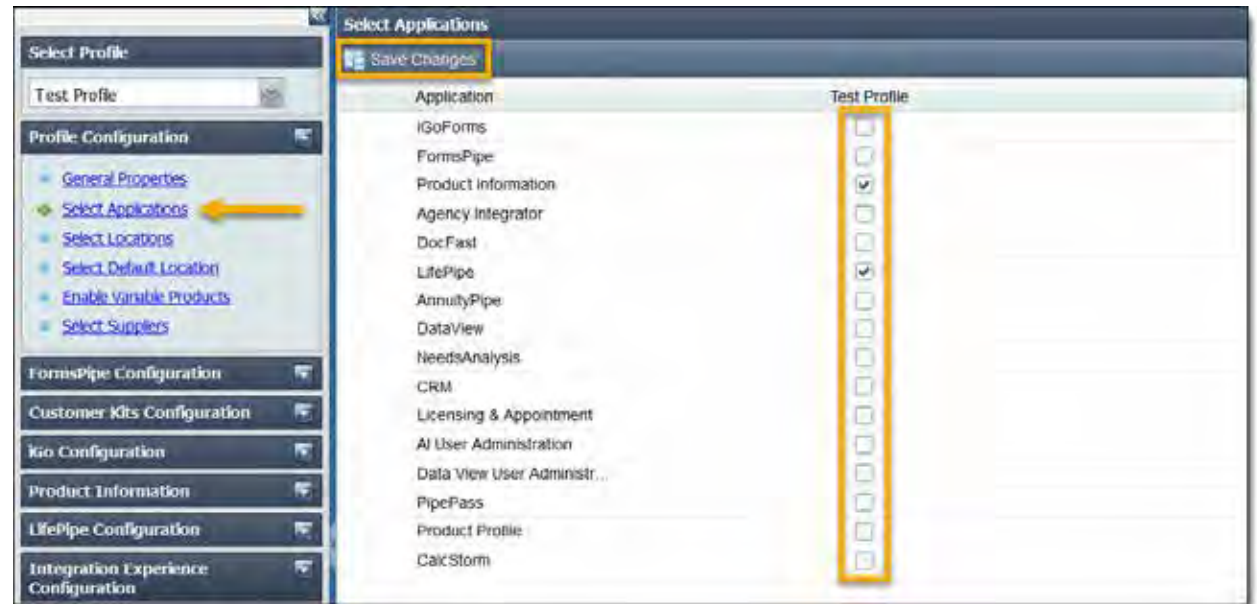
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Select Applications

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.



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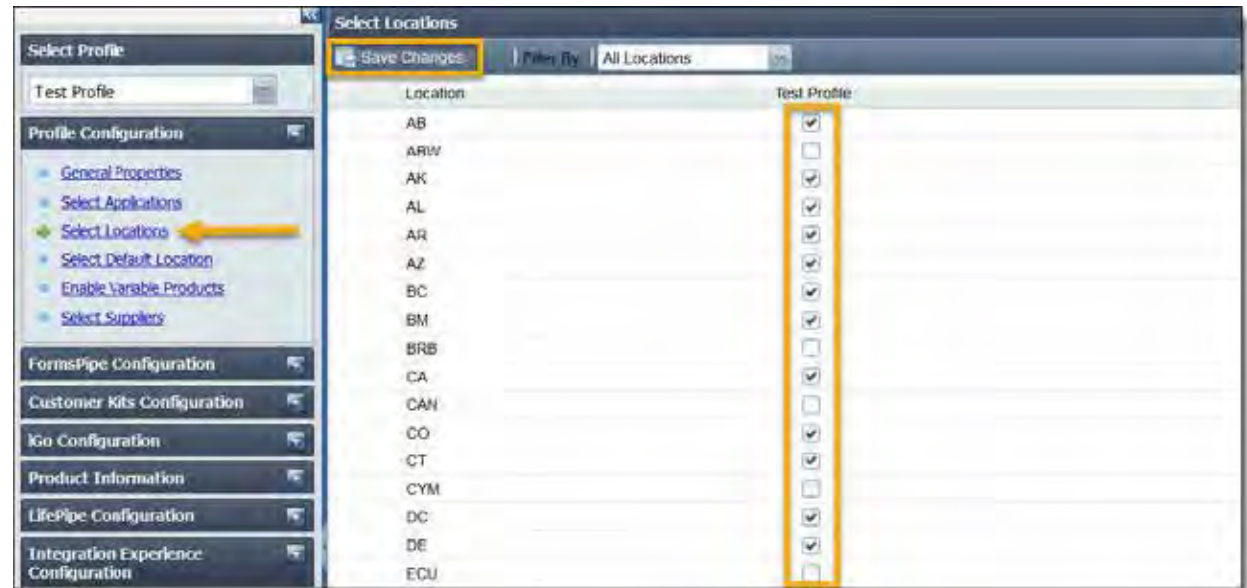
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Add Locations

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**.



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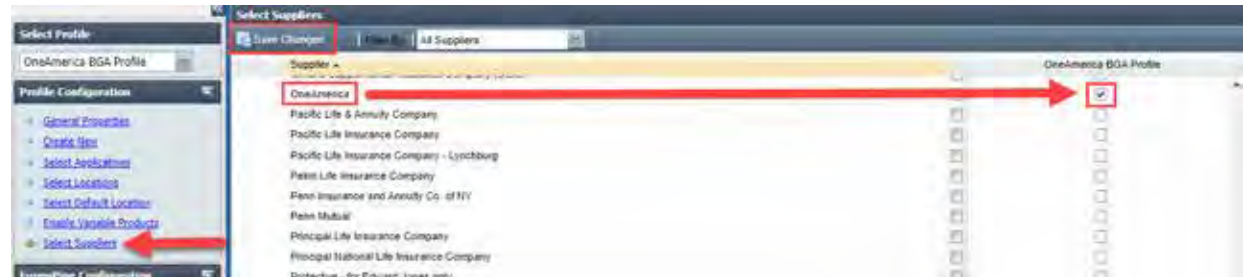
Add Carriers for iGO, Forms, and Product Information

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.

1. 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.



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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.



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.



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