



First Day Checklist for Illustration Software

Setting Up in Preparation for Using The Standard's Illustration Software

- If you haven't already done so, you will need to set up your unique standard.com user name and password.
- The illustration software can be used on any of the following browsers:
 - Internet Explorer 9 (Recommended!)
 - Microsoft Edge (32 bit)
 - Microsoft Internet Explorer - Versions 8, 9, 10, 11
 - Mozilla Firefox - Version 16
 - Google Chrome - Version 43
 - Safari Mobile for Apple iPad - iOS5 on iPad 1; iOS6, 7, and 8 on iPad2 and newer
- Review the training documents.

Setting Up Your System Preferences

- For common or frequently used settings, you may set up your personal preferences under the **Preferences** tab on the **Home** screen.

The screenshot shows two sections of a preferences menu: 'System' and 'Illustration'. The 'System' section includes settings for 'Recent List Items' (10), 'Rows per Page (Grid)' (100), 'Alerts Display Grid' (Auto Open), 'Show Producer Pane' (checked), and 'User Nickname' (ProducerME). Red arrows point to 'Show Producer Pane' with the text 'Displays producer name while running the quote' and to 'User Nickname' with 'This will be your name for Case Sharing'. A note below states: '* Deleting your nickname will remove sharing that has been created for you.' The 'Illustration' section includes 'Prospect State' (Oregon), 'Sex' (Male), 'Occupation Class' (3P), and 'Risk Class' (Non-Smoker). Red arrows point to 'Simplified Underwriting Message' (unchecked) with the text 'Turns on advisory messages regarding eligibility' and to 'Enable Real-time Calculations' (checked) with 'Enables premium to display while running quotes'.

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Setting Up Your Illustration Preferences

- You can set the left and right side navigation panels to display in a fixed manner on laptops and computer monitors. If the navigation panels remain hidden until you hover over them, check your device's screen resolution. The recommended setting is 1024 x 768 or higher. If that setting is not available or does not enable the panels to stay on screen, you may want to slightly decrease the browser's zoom percentage.

Setting Up Your Contacts

- Go to **Contact Management** to enter your commonly used producers. You can also enter your producers one at a time using the **Producer** tab on the **Home** screen. In addition, you can enter your client contact information including addresses, emails and phone numbers.

Note: This is your Contact Management information and, as such, it cannot be shared with any other users in your organization.