

Sharing Cases in the Illustration Software



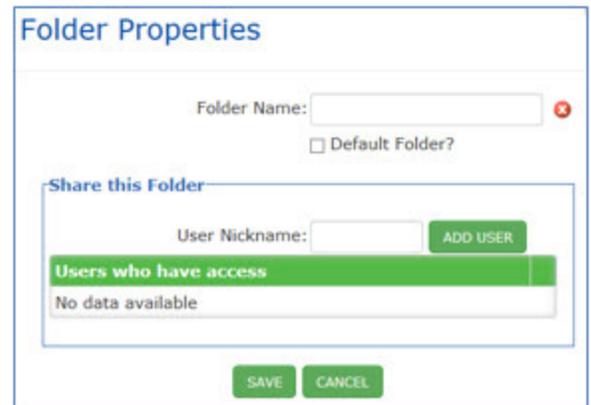
You can quickly organize and share cases with your producers by using either the folder nickname or export/import function.

Sharing Cases via Nickname Folders

The **folder nickname** function allows you to share cases with your producers in a designated folder within the illustration software itself as an alternative to emailing them, permitting both you and the producer to then make changes.

To use this function, you will need to know the nickname the producer has set up for themselves under the Preferences tab. Once you have the nickname, the following steps apply:

- 1 Go to **Case Management** and select the **Cases by Folder** tab.
- 2 Click the **New Folder** button to create the shared folder. This will bring up the **Folder Properties** dialog box.
- 3 Enter the name of the new folder in the **Folder Name** field.
- 4 Enter the producer's nickname in the **User Nickname** field, click **Add User**, and then click **Save**. This will close the dialog box and return you to **Cases by Folder**.
- 5 Select the **Cases** tab to view all cases and, under the **Case Name** column in the list of cases, search for the case you wish to share with the producer.
- 6 Select the check box next to the case and click the **Move** button (above the list) to transfer the case to the desired shared folder. The move happens instantly and the list is updated immediately. The producer will now see the case you've shared with them under their **Shared Cases** tab.



Once you have established a shared folder, you may continue to share any future cases with this producer by simply moving cases to their established folder.

NOTE: The Standard's Home Office staff can also share cases in the same manner as outlined above. Any cases they share with you will be available under your **Shared Cases** tab.

Sharing Cases via Export and Import

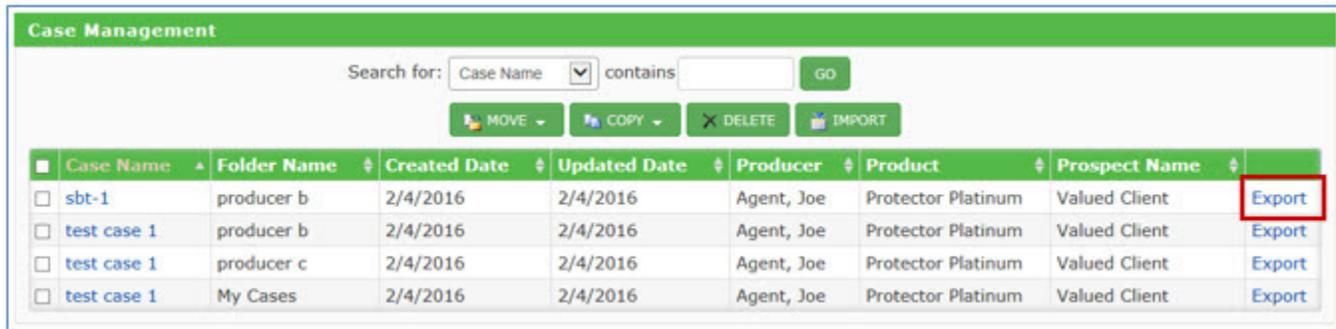
The **export** and **import** functions provide an easy way to also share cases with producers in situations where you may not know or wish to use the producer's nickname. The export function will generate a downloadable file that can only be viewed and modified by uploading it through the import function.

Continued on next page

To **export** a case:

- 1 Go to **Case Management** and select the **Cases** tab.
- 2 Find the case you want to export and, under the **Case Name** column, select the appropriate check box.
- 3 Click the **Export** link in the far right-hand column. This will open a message asking if you want to open or save a file called "**caseinfo.fse.**" This file name will be generated for every case you export. It is therefore recommended that you rename the file with a unique name for easier identification by the producer once they receive it.

WARNING: Do not change the 3-letter file extension (*.fse). This is needed by the illustration software to recognize the file.



The screenshot shows the 'Case Management' interface. At the top, there is a search bar with 'Case Name' selected and a 'GO' button. Below the search bar are buttons for 'MOVE', 'COPY', 'DELETE', and 'IMPORT'. The main area contains a table with the following columns: Case Name, Folder Name, Created Date, Updated Date, Producer, Product, Prospect Name, and an 'Export' link. The 'Export' link for the first row is highlighted with a red box.

| Case Name | Folder Name | Created Date | Updated Date | Producer | Product | Prospect Name | Export |
|--------------------------------------|-------------|--------------|--------------|------------|--------------------|---------------|--------|
| <input type="checkbox"/> sbt-1 | producer b | 2/4/2016 | 2/4/2016 | Agent, Joe | Protector Platinum | Valued Client | Export |
| <input type="checkbox"/> test case 1 | producer b | 2/4/2016 | 2/4/2016 | Agent, Joe | Protector Platinum | Valued Client | Export |
| <input type="checkbox"/> test case 1 | producer c | 2/4/2016 | 2/4/2016 | Agent, Joe | Protector Platinum | Valued Client | Export |
| <input type="checkbox"/> test case 1 | My Cases | 2/4/2016 | 2/4/2016 | Agent, Joe | Protector Platinum | Valued Client | Export |

- 4 Click the **Save As** button to download and store the file on your local or network drive.

After downloading and saving the file, you may attach it to an email and send it to the producer. Upon receipt, the producer will import the file to access and view it as follows:

- 1 Go to **Case Management** and select the **Cases** tab.
- 2 Select the **Import** button (the far right-hand button above the case listing). This will open the **Import Case** dialog box.
- 3 Across from the **File Name** field, click the **Browse** button to find and retrieve the shared case file.
- 4 Click **Import Cases** to upload the file. A message should appear in the dialog box indicating that the case was "successfully imported." Click **Close** to return to the **Cases** tab.

Once imported, the case will be available for the producer to view and modify as needed.