

# Adding a New Application Under the Same Lead

1. Select My Clients tab →

2. Highlight lead for which you want to add another application

3. ↑ Navigate to Apps Taken tab

4. Click New →

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Apps Taken (MP) Detail View Schedule Birthdays

Document Applications MP

New View Print Save As PDF

If you do not see these options, click the Show/Hide Info Windows arrow at the bottom right →

Title 121419\_Applications MP 2

General

Agent Name Ben Seifipour Application Date 12/14/2019

Submitted Date 12/14/2019 Received Date

☐ SPLIT TRANSACTION?

☒ APPLICATION

App.s Name FULL NAME (FIRST + LAST)

App.s First Name FIRST NAME App.s Last Name LAST NAME

Fill in BOTH name rows! The top row needs the client's first AND last names; on the next row, you will enter them separately.

Paramed Exam Simplified UW ☐ Yes ☐ No

Face Amount Modal Type

Modal Premium Payment Mode M-Monthly

Annualized Premium Initial Payment

Return of Premium ☐ Yes ☐ No Purchased to protect a mortgage? ☐ Yes ☐ No

Comments

First Time Carrier? ☐ Yes ☐ No <---Is this your first time writing with this carrier?

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