

# INSTAAPP AGENT FAQs



## What is InstaApp?

InstaApp, powered by iPipeline®, is an intelligent fillable form with carrier specific rules embedded. It enables you to electronically complete and process 100% in Good Order applications. It also improves your productivity so you can sell more insurance.

## What are the key features of InstaApp?

- Intuitive user interface - Improved navigation and workflow, dynamic alerts and statuses and graphical indicators
- Quick access to start a new client or view all existing cases
- Sharing and transfer feature for cases
- Enhanced product search capabilities
- Consistent look and feel across all platform applications
- InstaApp integration with Agency Integrator AMS
- Multi-Carrier Quotes - Generate quotes for multiple carriers within one integrated UI and seamlessly flow information from quote to InstaApp
- View/print filled complete or incomplete forms at any time
- Save and Update as many times as you like
- Print & wet sign to match your selling styles
- Customizable e-signature (Click-Wrap & Digital Pad)
- Electronic submission

## What are the key benefits of InstaApp?

- Speeds access to start a case and view an existing case
- Simplifies the tailoring of output to meet clients' needs
- Allows you to enter quote data once and generate multiple carrier quotes
- Eliminates need to work in multiple environments via InstaApp integration with Agency Integrator AMS
- LifePipe™ (iPipeline's term quote engine) users can now auto-populate InstaApp, eliminating the re-keying of data
- Reduce cycle time and get paid faster
- Write more premium
- Go paperless with "iGO Green" and save on imaging, gas and postage costs
- Deliver forms that are **100 percent legible** and **in Good Order**
- Trim 10-14 days after client signs to speed processing and sell 25 percent more
- Improve the consumer experience

## How do I register for a username and password?

Registering for a username and password is simple. All you have to do is fill in some basic information about yourself and answer a few security questions. As soon as you submit your form, an e-mail is automatically sent to you with your username and a hyperlink for you to set up your password.

## How do I get trained to use InstaApp?

All training materials, including videos, product collateral, a list of frequently asked questions, and iPipeline's InstaApp Support contact information can be found at:

<http://training.ipipeline.com/>

In addition, trainings are held via WebEx and Teleconference every Tuesday from 3:00 to 4:00 p.m. ET. To register, go to:

<http://www.ipipeline.com/contact/igoRequest.php>

## How do I access InstaApp?

There are three ways to access InstaApp:

- On your distributor Web site, you will see an InstaApp banner. This will allow you to view a demo, login or register for a username and password.
- At the forms engine, you will notice another access point.
- Our term quote engine now integrates with InstaApp. An additional feature you will see in the quote engine's profile page is the ability to customize your view to run quotes for InstaApp carriers only. By viewing the results page, you will notice the green InstaApp button. Selecting the button, your client's information will be pulled from the quote engine and populated throughout the carrier application of your choice.

## What tools do I need on my computer?

**Browser Compatibility:** IE 7 & up, Firefox, Safari and Chrome

**Bandwidth:** High-speed Internet Connection

**Hardware Requirements:** Any standard operating systemword

**System Requirements:** System requires browser; Adobe Reader version 8 or higher; Do not have 3rd party cookies and pop ups blocked

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## What do the visual cues within InstaApp mean?

There are four main visual cues used within InstaApp:

- If you type the information in right within the e-application, we will turn the respective FIELD FROM YELLOW TO WHITE.
- A RED QUESTION MARK underneath a particular section, points out that you have made a mistake and that you eventually need to come back and fix it.
- A GREEN CHECKMARK lets you know that a section is filled out correctly.
- A GOLD STAR indicates that your application is 100 percent in Good Order.

The image displays three screenshots of the InstaApp interface, illustrating visual cues used to indicate the status of the application:

- Yellow Highlighted Field:** A yellow box highlights the Social Security # field in the "Proposed Insured" section, indicating a field that has been corrected from yellow to white.
- White Corrected Field:** A white box highlights the Social Security # field in the "Proposed Insured" section, indicating a field that has been corrected from yellow to white.
- Red Question Mark:** A red question mark icon is shown next to the "Proposed Insured" section in the navigation tree, indicating a section that needs attention.
- Green Checkmark:** A green checkmark icon is shown next to the "Residence Address" section in the navigation tree, indicating a section that is filled out correctly.
- Gold Star:** A gold star icon is shown next to the "Validate and Lock Data" section in the navigation tree, indicating that the application is 100 percent in Good Order.