



# 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:
  - Latest Edge version
  - Latest Chrome version
  - Latest FireFox version
  - Latest Safari iOS for iPad version
- 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 the preference settings:

- System** section:
  - Recent List Items: 10
  - Rows per Page (Grid): 100
  - Alerts Display Grid: Auto Open
  - Show Producer Pane:  (Annotation: ← Displays producer name while running the quote)
  - User Nickname: ProducerME \* (Annotation: ← This will be your name for Case Sharing)
  - \* Deleting your nickname will remove sharing that has been created for you.
- Illustration** section:
  - Prospect State: Oregon
  - Sex: Male
  - Occupation Class: 3P
  - Risk Class: Non-Smoker
  - Simplified Underwriting Message:  (Annotation: ← Turns on advisory messages regarding eligibility)
  - Enable Real-time Calculations:  (Annotation: ← Enables premium to display while running quotes)

## 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.

*Continued on next page*

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.