

Illustration Software User Tips



Navigation

- Use your mouse to navigate through the tabs and menus.
- Avoid using your internet browser's back arrow to navigate, as it is not designed to function within the software.
- Use the **Tab** key, rather than Enter, to move from field to field.

Illustrations

- Before you start each new illustration, on the Producer tab, select the First and Last Name of the producer who is assigned to the case or you can add them as a new producer.



- An illustration may be initiated in the following ways:
 - ♦ From the **Start Illustration** tab (on the Home page)
 - ♦ From the **New Case** icon (in the left-hand navigation panel)
- On the **Start Illustration** tab, select the appropriate **Product Name** to begin your quote.
- You can change the product selection by clicking the **Change Product** button (in the left-hand navigation panel next to **Product Name**).
- Always **Save**, name and close your cases. Since there is no need to log out, if you close the browser you will not be prompted to save your work. And, if you forget to save your work, it will be automatically deleted after 24 hours. The illustration output is saved separately.
- Cases do not close automatically after saving. Use **Open Items** to view them and the **Close** button when done.

Other Tips

- Use your device settings to customize your screen view. If your screen resolution does not automatically display the left and right side panels, you can change your browser's zoom settings to view them.
- Use the **Preferences** tab (viewed from the **Home** screen) to set your defaults and turn on display options.
- The system will time out after five hours of inactivity.
- When sharing cases, remember that the case will only appear under the **Shared Cases** tab of the person the case is actually shared with (you will not see it under your Shared Cases).
- You can organize cases that may be related by creating new folders under the **Cases by Folder** tab on the **Folder Management** screen. Click the **New Folder** button to add and name them.