



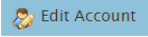
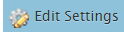
Job Aid

QB Life is an online quoting platform for life insurance quotes. It generates printable letters in a PDF format for Standard Non-Tobacco and Preferred Elite packages.

The input for QBLife comes from several sources.

1. After Flashback finishes re quoting it will ask if you want to create Life Quotes, selecting yes will send leads to QBLife website.
2. Importing a list of leads.
3. Add an individual name.
4. Collect a TaG list using the QB Life Collector.

Getting started


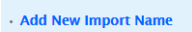


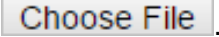

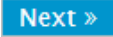
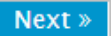
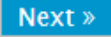

- Go to www.qblifequotes.com
- To enter the contact information click 
- To change the age increments and amounts click 

Templates cannot be edited

Getting Data

- For **Alliance leads**: once Flashback has completed quoting it will ask if you “Would like to create Life Quotes for this group of leads”. Selecting “Yes” will send the list to the QB life website. The list name is “Flashback file” followed by the date & time.

Importing a list:

- Add the name first
 - Click 
 - Click  in the top right box.
 - Enter the name and click 
- Click 
- Click 
- Select the file and click 
- Click 
- Use the drop down to select the file name you previously added.
- Ensure the columns are matching the data and then click 
- Ensure the data is parsing correctly the click 
- Click 

Step 2 of 5

Match the columns in the import file with the columns defined below. This is important to make sure that QB Life knows how to properly label the columns.

Prerequisites



Import Name:

- The import name you choose here will be associated with this import.
- If you have another import with this name, they will be merged into one.
- If you need to create a new import name for this import, please click [here](#).

Column Alignment



First Name	FIRST NAME
Last Name	LAST NAME
Email	
Phone	
Address	ADDRESS
City	CITY
State	STATE
Zip	ZIP CODE
DOB	



Can't see any columns? Please click [here](#)


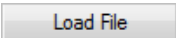


 


Step 3 of 5

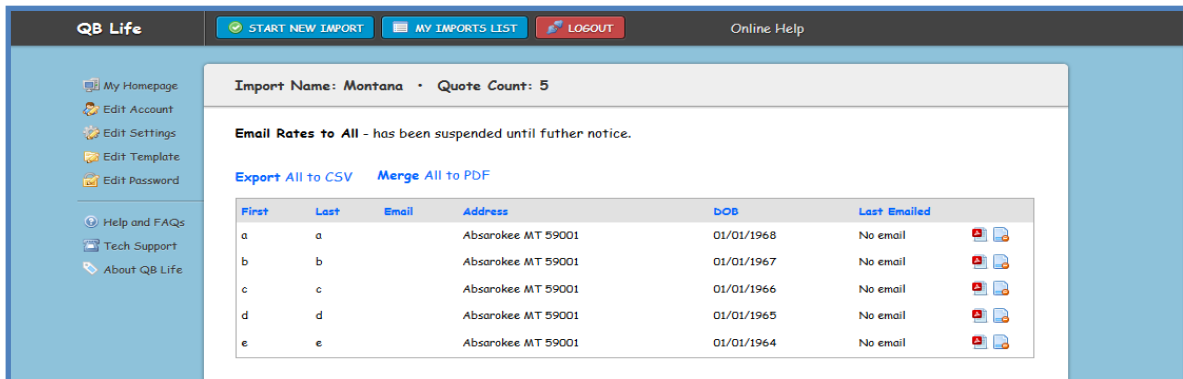
Please carefully review the data shown below, and verify the data looks properly. The preview below only shows the first 50 records as a sample. If there is an icon (other than the green one) in the left column, please mouse-over to see the error message.



	First Name	Last Name	Phone	Email	Address
	Ruben	Mata	2145973678		2019 Euclid A
	Angel	Carter	6782700422	alcarter1008@gmail.com	142 Point Plac

- Adding an **individual** name:
 - Click 
 - Click **Add New Individual Quote** on the right side.
 - Enter the prospect data and click  It is saved in your "My Miscellaneous Import" list at the bottom.

- Collecting **current customers** without a life policy:
 - Click on the QB Life icon on your desktop
 - Click 
 - Fill in information on Agent Tab
 - Click Cross Sell TaG File
 - Click **Click Here** and follow instructions to download the TaG file.
 - Click 
 - Click 
 - Select State and last name range.
 - Click 
 - When the collector finishes, it goes to www.qblifequotes.com

- Quoting
 - Go to www.qblifequotes.com
 - Click 
 - Click on the desired list



- **Export All to CSV** – Creates a .csv file of all the leads
- **Merge All to PDF** – This allows you to print all Quotes.
- To the right of each entry are 2 icons.
 -  Click this one to download the PDF for this prospect for viewing or printing.
 -  This will remove the prospect from the list. Once removed, you will not be able to add it back.