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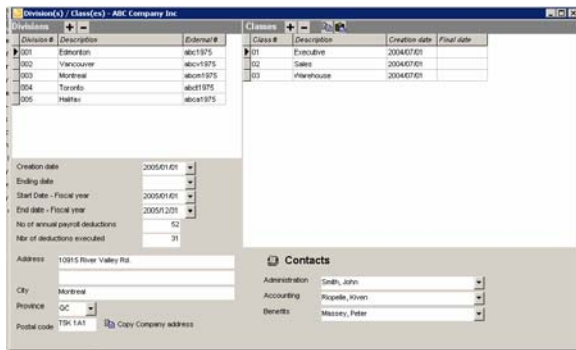# CHAPTER 2 –SALES MODULE AND PROJECT MANAGEMENT ADVANCED FUNCTIONS

Congratulations! You have successfully completed your initial exploration of *Sales Module and Project Management*. If you followed the step by step procedures of chapter 1, you were able to generate your first RFP as well as produce a simple, summary and detailed analysis. The whole process should have been carried out with very little effort and you should now have a good understanding of the Sales Module and Project Management logistics.

As professional, you probably would like to expand further the delivery of your products and services. **Sales Module and Project Management** offers several additional functionalities that will allow you to generate more sophisticated documents and analysis.

Functionalities

Division/Class

When we created your first project, we accepted the default value of: One (1) division and one (1) class. *Sales Module and Project Management* makes it possible for you to manage sponsor with more than 200,000 members. Consequently, this basic module will enable you to manage as many divisions and classes that can be required.

Each division will insure proper capture of all the needed specific information including the tax configuration and addresses.

It is important to know that although it is simple to create a substantial number of divisions and classes; subsequent managements (assignment of the benefits, employer contribution, etc) will preserve their simplified approach. Thus, all the management will rest on the concepts of inheriting from the higher level.

As presented in the graph, the green boxes indicate that particular assignments were allotted to: the sponsor, 1 division and 2 classes (in green). All other Divisions or Classes (gray) will inherit the assignments of the higher level, which if not assigned, will inherit the assignments of the Enterprise.

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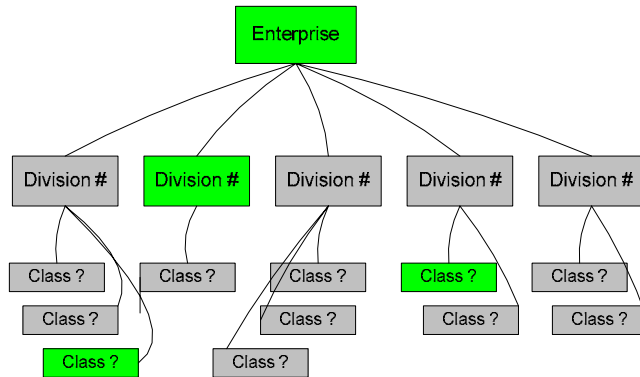
Thus, we can easily create at the Enterprise level, the generic configuration for the majority of the

participants and then assign exception cases distinct conditions. Using this powerful logistic you can limit the configuration obligation, while insuring specific assignment to each group of individual in respect with collective agreements or employers' policies.
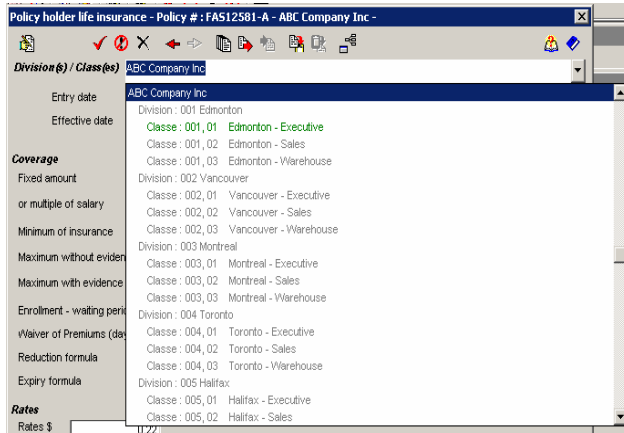
Matching our graphic colors, when we assign particular conditions to the sponsor or to one of the exceptions (Division or Class), the system will display them as "green" *vs* the heirs who will remain in "gray".

All the subsequent processes (calculations or printout) will automatically reflect these particular states. This will ensure precise results as well as structured and optimized reports improving on your professional image.

Employer contribution

In the pure *Sales Module and Project Management* module, the **Company Contribution** is informational only. The information will be included in the RFP report to keep the carrier posted on the sponsor position.   The % of premium and fixed amount options are included automatically. More advanced configurations are available as options.

The "**C-surance.ca Virtual Calculation I**" module is available as an option for those who need employer/employee contribution reports.
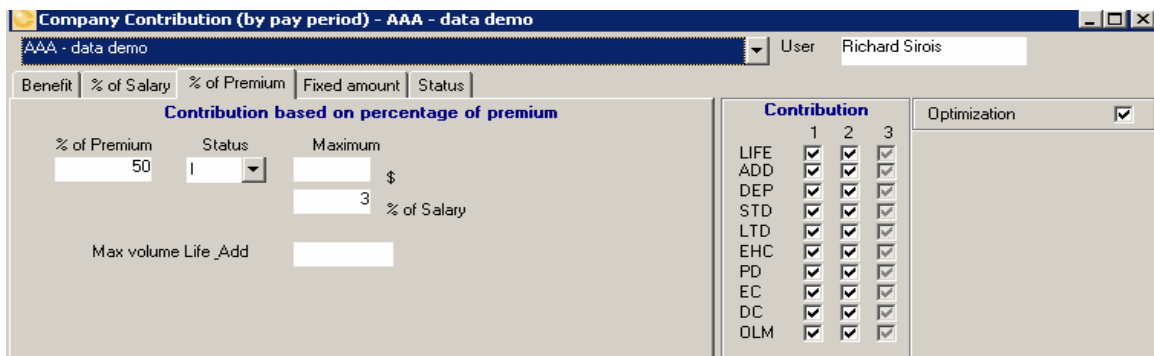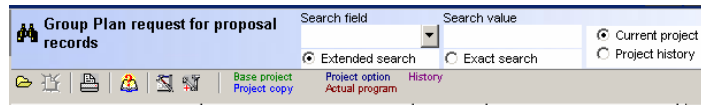

Sales Module and Project Management

Bank plan and benefits - Maintenance – Update

In collaboration with carriers and partners, MDI insures the creation and update of the various standard benefits and plans offered by your carriers. These options are available when selecting the "Lists of projects" module.

Taking advantage of the Collaborative *C-surance.ca* mode, the new and improved plan can be easily updated into your user resources by a simple click on the tools button, and select "**Bank Import**" to ensure that you access to the most recent information. Warning: this action integrates and updates an important mass of information and will take some time. It is important to be patient.
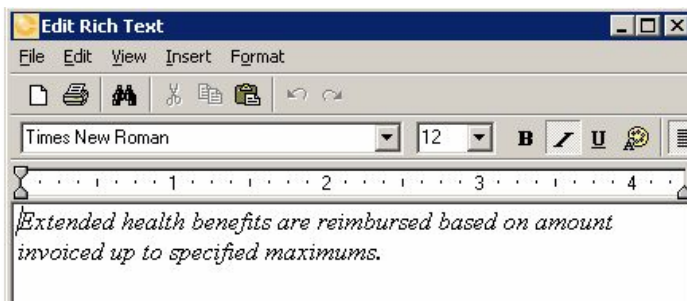
RFP or sales tool?

Rediscover information copied into your project when you assigned a carrier plan from the bank of plans.

The "**Remarks**" and "**Options**" sections of each benefit provide you with useful additional information which can be of an unquestionable interest. To fully appreciate and view the content, position your mouse in the field and click on the right button. Select then the "**Edit**" option.

In these sections, the MDI professionals, partners, users or carriers can incorporate the principal characteristics of the benefit or in the second block, list the available options available. These are free format text. The French samples

In accordance with the basic offers of your carriers, you will find for example: various insurances limits, reductions and terminations formulas, as well as all the other options suggested by your carrier.

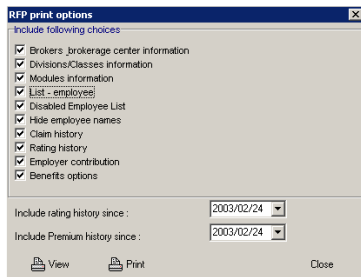**Sales Module and Project Management**

This information, just like the promotional information of the plan, is offered to you by *Sales Module and Project Management* to simplify your document management.

Thus you will be able to prepare and print 🖶 your RFP ("Lists of projects" module) with the objective of visiting your customer with the proposed plan, as well as the various available options. To get this extra information you will only need to check "**Benefit Options**" when you ask for a printout of your **project**.
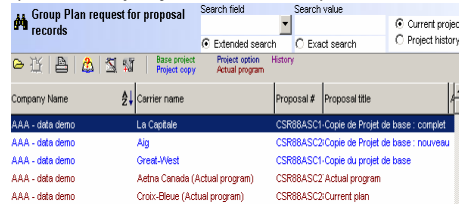
We invite you to consult the "**Documentation**" Documentation section of your projects.
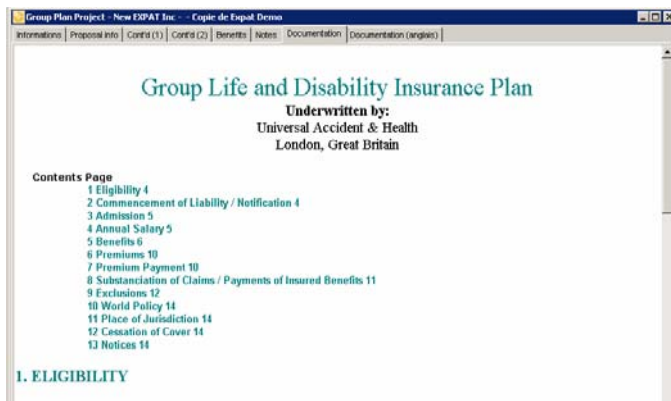
When available, you will be able to find under this section, the contents of the promotional booklets of the carriers.

Our objective is to ensuring that you will have access all the promotional booklets of your carriers at the relevant time, while eliminating the needs for paper management.

Additional information (ADD, Ancillary medical, Hospital fees, Other expenses)

To select in the Bank of services:

The banks of plans, benefits as well as the additional information banks, enable you quickly "**To assign**" benefit as well as defining the insured limits.
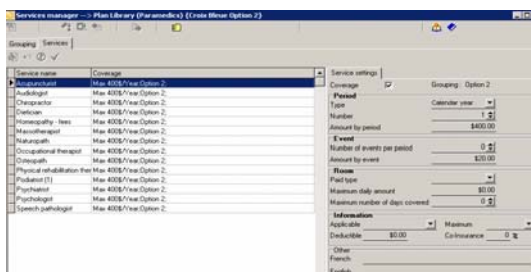
To access information directly, you need only to click on one of the dedicated buttons 🖥 🚑 🛒 which you will find under the **Extended Health Care, ADD, or Dental Care benefits**. The management of this information is identical for each one of them. Here thus important suggestion on how to best handle these information.

Sales Module and Project Management

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The various services plans were created by MDI and their partners in order to simplify your management of the services.

By clicking on the [icon] button you will be able to get an update of the various available plans. Thus, following a carrier's change of services, it will be possible for you to obtain their most recent services suggestions. The process does not require any human intervention. It will however be necessary to be patient since all of your bank of information will be updated.

The [icon] button will enable you to pick and choose from the bank of services, the products which will best respond to your needs.

By selecting from the bank of plans, your file will automatically inherit of a certified copy of your selection.

Customize your services:

C-surance.ca enables you to customize each service to ensure that you will present the SPECIFIC of your project or contract.

The [icon] button will enable you to manage the list of the items which will be posted on your file.
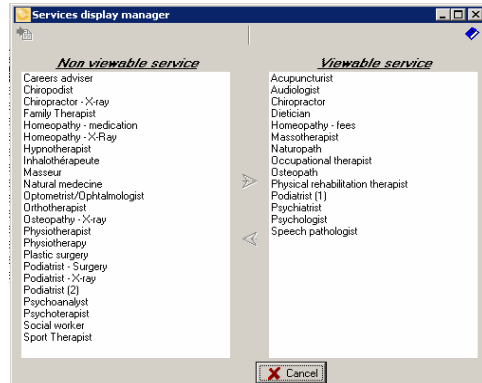
The [icon] button will make it possible to update the list of the available services. Should you identify missing services, you are invited to email to MDI the missing items and the professionals will make sure to quickly add the necessary services.

By using the arrows [arrow] and [arrow] you will be able to transfer the services towards the right side or the left.

WARNING, as a protection, it will not be possible to remove a visible service if this service is active. It will thus be needed to first deactivate the service.

The data can be processed individually or by regrouping. Grouping Services

Two (2) important tabs are available to enable you to configure your various services. :
- ➢ Regrouping
- ➢ Services

The "**Services**" section enables you to manage each service individually. You will be able to add, remove or modify the various services which are available in your project or your contract.

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To modify a service, you will first need to select the service to be modified then to activate the "**Edit the service**" Button .

This activation will make it possible to access detailed information of the selected service. The activation will make active the Quit and Accept buttons. It will be essential to select one of these buttons to be able to alter another service.

You will be able to adapt some 14 fields of information to configure them to your specifications.

The services can be managed individually or, they can be grouped. For example, professional services including: chiropractor, audiologist, masseur and others can belong to a group which you can call "Pro". The limit will then be regarded as common and cumulative. In this case, it will be easier to modify the "Grouping" instead of each service.

If you modify one individual item belonging to a GROUP, information in non conformity will be posted in red in the section "**Services Parameter**".

The "**Regrouping**" section enables you to manage the same information as those of the services except that we add an ASSOCIATION option.

Thus it will be possible for you to create a new or modify an existing regrouping.

In each case, you will have additional "**Associations"** tab which will give you the option to regroup services. As for the services screen selection, it will be easy to assign or not a service to a group.

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By using the arrows   ▶   ◀ , you will be able to transfer the services towards the right-hand side or the left.

For the user in mode XPRO, three (3) additional buttons will allow him to manage its own banks of information. Thus he will be able to create new items or, to modify them.

Current plan and options creation

When you send your RFP to your carrier including the terms and conditions wished for the renewal, you might want to send them the details of the current plan. By the same token, if you wish to propose various options to your customer, you will need to create options.

To do so, *C-surance.ca* offers simple and effective tools to you. However, **we highly recommend that you plan this work to avoid useless wastes of time**.

During the creation of the initial project, we suggest that you first input the current plan information. *If you are renewing a current **C-surance.ca** administered plan you will simply need to import the current plan from your administration module into your sale module and name it* **Basic Project**.

Current plan creation

If your current project information corresponds to your current plan, you can ask *Sales Module and Project Management* to make a copy of your project as a current plan. On the "**Information**" portion of your project screen, a mouse right click will provide with a small two (2) options menu.

By selecting "**Current plan model**", the system will then propose you to identify the current carrier and then will automatically make a copy of the project.
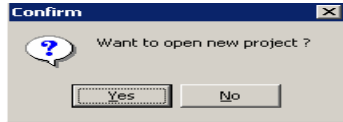
If you accept, you will have **integral copy** of your basic project which will now become a completely distinct version.

Sales Module and Project Management

Once copied, *C-surance.ca* will propose to open the new project.

The name of the project will be automatically assigned as "**Current Plan**".

If you produced your current plan starting from the bank of plan or benefits, it is possible that the current plan have inherited unneeded comments in the "**Remarks**" section of each benefit. This information should be removed.

You can also add the rates and units or any other relevant information.

If you carry out the renewal of a file coming from the *Sales Module and Project Management* or *C-surance.ca* data base, your file should already be in conformity and not require any human handling.

Once your **"Current Plan"** as been edited, you are invited to open your "**basic Project**" again to modify your project in accordance with the customer expectation. To validate your customer requirements, you can print your RFP and analyze the contents with the customer. (See preceding section).

To help you guide your customer, remember that you can find option details in the note portion of each benefit.

Options creation

Once you have completed your project specification in accordance with the renewal specification, you will be able to generate copies of project by using the **"Create Options project"** selection.

Again, you can ask *Sales Module and Project Management* to make a copy of your project as an option in the same manner as when you created you current plan. On the "Information" portion of your project screen, a mouse right click will provide with small two (2) options menu.

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Once copied, we suggest you change the Option name of your project to clearly identify your option and then to confirm your renaming while clicking on the Ok button ✔.

When you will proceed in generating copy of your project for your various carriers, **Sales Module and Project Management** will automatically copy the basic plan as well as each option. During the transmission to the carrier, the system will send to each carrier a copy of the current plan, in addition to the project and its options.

In your list of projects, you will be able to identify the various categories of projects based color as well as specific descriptions.

Sales Module and Project Management makes it possible to manage several years of projects. You can thus select the criteria of display for your projects according to current projects' or including the projects in history. You can also define according to specific values in search fields. Explore these options.

Processing carriers offers

You will receive the answers of your carriers in various formats.

Remember that the system created individual copies of your projects for each carrier. Thus if the offer of service of your carrier respects your RFP, you need only to supplement the rating section by using the [Insurance rate chart] module available from your analysis management tool.

If your carrier proposes you their own equivalent standard package, which will present divergence from your request, you will have various choices:

  ➢ Use the banks of benefits of these carriers; [Assigning benefits using template]

  ➢ Use the banks of plans 📑

and/or

  ➢ Replace each distinctive elements;

Sales Module and Project Management

That is available to replace the project options by those of your carrier. Follow the same procedures as those described in chapter 2, section "**Banks of benefits**".

C-surance.ca format

The majority of the carriers, responding to the request of their advisers, can reply in *C-surance.ca* format. MDI offers a carrier equivalent C-surance.ca solution. It is already agreed with the majority of these carriers that the adoption of a universal standard will be beneficial for them; this is why the usage of the projects management module is financed by MDI and the latter.

Before investing in an electronic reply, the carriers will want to be assured that the advisors will transmit complete projects requiring little or no human intervention. The user community will assume exclusive responsibility to make their representation to their carriers.

Carrier Format

Even if you do not receive your reply in the ideal C-surance.ca format, *Sales Module and Project Management* allows you, of easily and effectively, input the divergences between what you asked in your specifications.

Employees Management

There are several tools available to ensure the input as well as the maintenance of the employees list.

We explored in chapter 1 "**From the creation to the analysis**", the employees importation procedure from an Excel file. This method is the simplest and most natural for the uninitiated *Sales Module and Project Management* user to input the new employees in the data base.

Two other tools are available to make it possible to input the new employees or, to make modifications. Mass employee changes is a very particular activity associated the management of employees in group insurance. *MDI* thus created tools specialized to simplify and optimize with a minimum of effort, the specific operations to this profession.

Individual employees edit

Click on the ⬚ button to individually create each new employee file. An "**Employee File**" screen will then be displayed to enable the input of information. This screen will allow a maximum of control on the contents of the each field to be inputted. The red boxes represent compulsory fields needed to insure integrity of processes and calculation. The yellow boxes are optional but strongly recommended fields.

The input fields are contextual with the preceding inputs. For example: only the benefits activated in the project or the contracts will be available for status input in the employee file. When a file is created, you can access the file directly by double-clicking on the selected employee from the "**List of the employees**".

Employees Editor

Click on the button to access a specialized module and allow the massive edit of employees. The employee editor was created to respond to particular maintenance issues related to managing group insurance.

The employee editor is a utility tool that allows block of employees' data to be changed. When you call this editor, the system will propose to import the list of the employees of the principal and active base into the editor.

A screen of selection will propose various options of importation but will suggest by default, the importation of "**Table of employees from C-surance.ca**".

It will then need only to click on "**Next".**

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The employee files information will be transferred in the **Editor** module.

The list of employees Editor offers a series of tools and functionalities which are important to discover.

First, since the system can save (according to active options and the selected level of power) the history of the changes, it is necessary to identify the type of changes. By the same token make sure to check the input and effective dates.

By default, the system will define the list of the fields which are displayed for this edit function. The benefits selected in the project or the contract will automatically define the fields of benefits which will be displayed.

  The option gives the operator the liberty of selecting the list of the fields needed for his particular task.

A simple screen makes it possible to select each needed field.

The right-hand side button will make it possible to import from the *C-surance.ca* bank the most recent standard "templates" to facilitate the automatic selection of viewable fields.

Sales Module and Project Management

The operator can sort (in ascending or decreasing order) the list according to any field available by clicking on the title.

To add new employees:

EXCEL IMPORTATION

To add new employees, it is possible to import from external file a list of employees. An import menu ![Import] will be displayed to select the file to be imported. If an Excel "template" need to be used, it will be possible to import it on its local disc while clicking on the button ![icon] .

MANUAL INPUT

To add new employees on the list, there are 2 methods:

1. To use the + before ![+ X ✓ icons] each addition or

2. Check the ![Auto-insert] option which will automate the process.

To delete an employee, button **X** should be used ![+ X ✓ icons] .

N.B.: An employee who was imported from the active data base cannot be removed. He will be eliminated from the list in the editor but not in the active list. Only a new employee created in the current work session can be deleted.

DEFAULT VALUES:

The operator can input individually each field of information or better, use the automatic default values creator.

Two options are available:

1. ![icons] Allows for selection of a line of information as default value.

2. The selection of the middle button of the following series ![icons] will make it possible to access a list of the default values which are available to activate the required values.
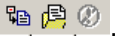

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MDI provides default values automatically for each of the five (5) the basic status. It will thus be enough to select the desired plan and to click on the activate button.

If the suggested values are not appropriate to you, you can at will modify them by editing directly in this table the values necessary.

You can create your own default values banks and add them to the current list. To do so, you must input in the various fields the default values of the selected employees then press on the first button of the series.

SUPPLEMENT INCOMPLETE FILES:

When one import data, from an external files; it is possible that the imported information might not contain all the needed data. For example: benefit status, Division, Class, Employment starting Date, etc

You can:
  1. Manually input the redundant information or,

  2. Use the default values functions which were defined in the preceding operation.

  To use the default values and to apply them to existing files, you will be able to then capitalize on the series of following buttons:
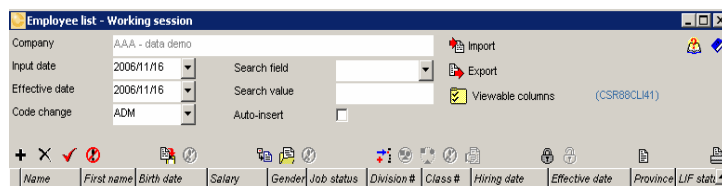
  By clicking on the first button, you activate the "**Insertion of default value in the empty fields**" function.

Automatically, you will note that various buttons are deactivated whereas the four (4) others of the series are activated.

  Now that the option is activated, you can select the targeted employees:

  1. Manually and individually. It will be necessary to keep the **Ctrl** key pressed and to click on the target files.

  2. By using the second button of the series to select ALL the files while the third will unselect them all.

  After having identified the files, you will need only to click on the last button so that the module fills the empty fields with the values defined in your default bank of values.

  To deactivate the function, the fourth button will have to be used.

Sales Module and Project Management

Caution: it will be necessary to be careful during the use of this automatic functionality. Remember that the system will fill **all** the empty fields with each selected file. The changes will be made without distinction or human judgement. If you have very precise fields to fill, ensure you to create the specific values.

You can use the sorting of the fields to facilitate the targeting of your files.

Display

You can use the "**Lock**" button to fix the first display fields which will be locked in place while you move to the farther right fields.
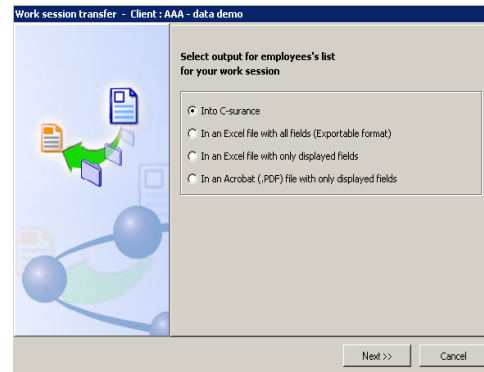
Print

By selecting the "**Print**" button, the system will enable you to print relevant information.

Export

The Export button will give you various export options:

> Into C-Surance:

> Export your improved information back in the active data base and create an event changes.

> In Excel files:

- Only posted Information

- All available Information

> In a PDF Acrobat file

When you export the data back into Allegroupe, a validation module make sure to sort out files that could represent special situations:
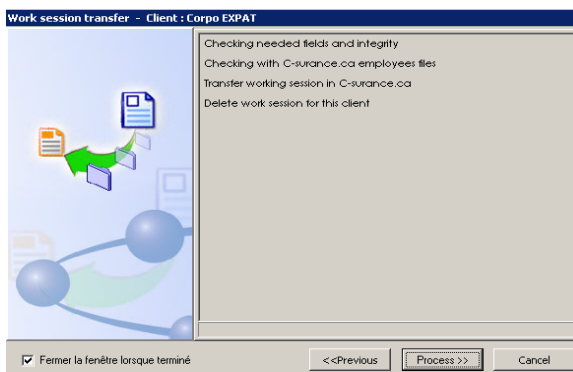
> where information are similar or identical to an already existing file;
> will present the files for which a movement was recorded;

> ➢ will present the new files which will be added.

To consult the legend with the bottom of the screen to identify the actions that will be taken.

A report of evolution will make it possible to obtain the results of the process.

or of evolution will make it possible to obtain the results of the process.

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