LIFE NEW BUSINESS

Book of Business Guide

Lincoln Producer Website

The Lincoln Producer website features a fully integrated book of business to manage your inforce accounts. If you have a login to the Lincoln Producer website with a Financial Professional view (not a Prospect view), you have access to all of your placed policies from Lincoln within the Book of Business tool. This tool features enhanced reporting with the ability to customize information to export into Excel.

Guide Overview

- How to access
- Book of Business records navigation
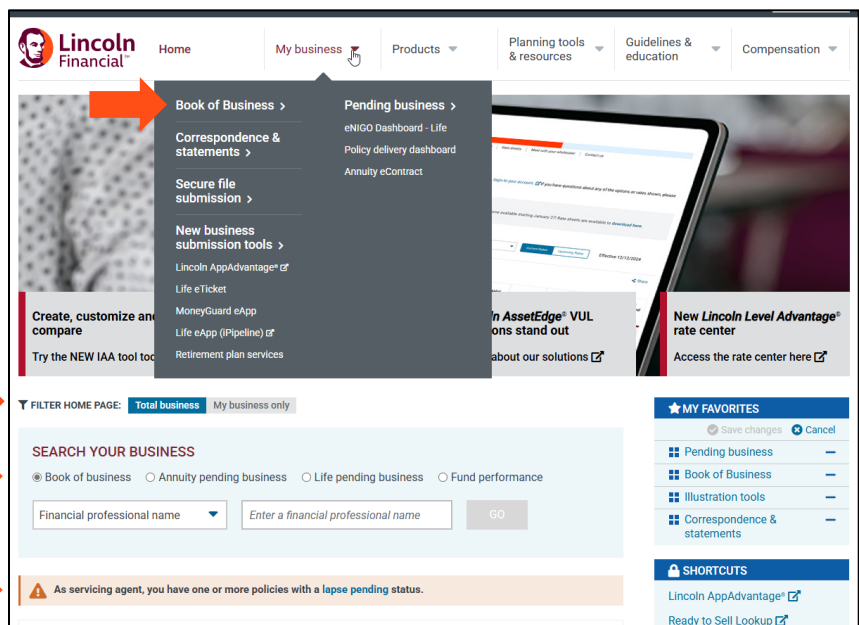- How to sort/export list

How to access

Once logged into the Lincoln Producer website, there are a number of different ways to access the Book of Business tool:

Home Page access:

If you are the Agency Manager, here you can **filter** the content to include Total Business (including all of your Financial Professionals) or My business only (depending on your login credentials)

Select Book of business to view a list of your Financial Professional's or your pending and placed policies

Important messages regarding your policies will appear here

From the drop-down menu:

Select **My business** from the top bar, and then select **Book of Business** from the drop-down list box.

You are now viewing the Book of Business home page

View a summary of total book value and active accounts for your entire Life and Annuity business.

Here is the list of all of your accounts in the Book of Business records list

Navigating within the list of records:

A. Click on the **+** in the OWNER/PLAN field to see a snapshot of the policy

B. In the account column there are two interactive links
   a. The first link is the **policy number**- when you click on this you will have access to all of the account details including: Account coverage, Rider & benefits and Billing information
   b. The second link is titled **correspondence** – here you can search for all of the correspondence and statements that have been sent to the client by type and date range.

C. Hover over the blue circle with **?** for additional information

D. Unpaid Premium Reports, include:
   a. Missed premium report
   a. Lapse pending
   b. Lapse
Reports can be filtered by timeframe and further refined.

How to sort/export the list of records

From the Book of Business records list: All of the sub-headings have arrows to sort the entire list in alphabetical or chronological order.

For a more refined search click on **Advanced search**.

There are several available search fields for Life and Annuity:

Additionally, the **Advanced search** tool allows you to utilize drop-down screens and search by several different fields

Some of the most popular searches include:

- Line of Business
- Product type (Life Product in this example)

Once the report is generated, you can export it into Excel or XML or print the report – the exporting options are located above the records list.

For additional information, please contact your Lincoln sales representative.