

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

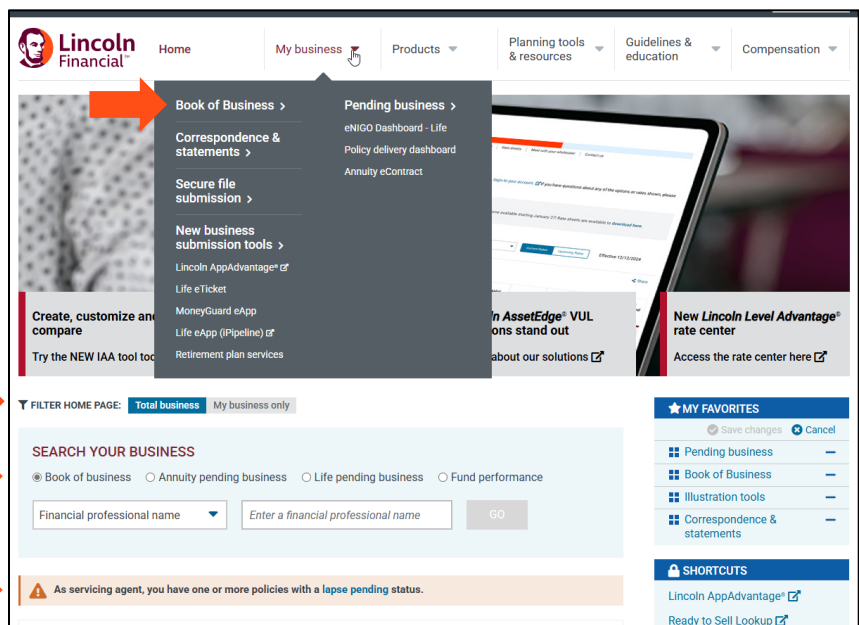
Once logged into the Lincoln Producer website, there are a number of different ways to access the Book of Business tool:

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:

- Click on the **+** in the OWNER/PLAN field to see a snapshot of the policy
- In the account column there are two interactive links
 - 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
 - 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.

- Hover over the blue circle with **?** for additional information

- Unpaid Premium Reports, include:
 - Missed premium report
 - Lapse pending
 - 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**.

Quick search

Last name Enter an owner/client last name GO **Advanced search**

Reset quick search

Search results: All
Number of records matching criteria: 869

EXCEL | XML | PRINT
CUSTOMIZED EXCEL

Records per page: 50

EXPAND ALL | COLLAPSE ALL | Show: All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

| OWNER/PLAN | CLIENT | ACCOUNT | PRODUCT | EFFECTIVE | INDEX ANNIVERSARY | VALUE | RIDERS | FACE AMOUNT |
|------------|--------|---------|--|------------|-------------------|-------|--------|----------------|
| + | | | LINCOLN LIFE/ELMENTS LEVEL TERM (2019) | 09/13/2021 | N/A | | Yes | \$3,000,000.00 |
| + | | | TERMA-LINCOLN LIFE/ELMENTS LEVEL TERM 2017 | 09/21/2017 | N/A | | Yes | \$1,000,000.00 |

There are several available search fields for Life and Annuity:

Advanced search

LINE OF BUSINESS
☒ Annuities ☒ Life

ANNUITY PRODUCTS
All annuity products

LIFE PRODUCTS
All life products

ACCOUNT VALUE
All values

OWNER/PARTICIPANT AGE
All ages

ISSUE MONTH
Select month

BIRTHDAY
Select month

INVESTMENT REQUIREMENTS
All investment requirements

SERVICE FEATURES
All service features

MARKET TYPE
All market types

OWNER'S STATE
All states

ISSUE STATE
All states

SHOW
All accounts

Reset advanced search Reset all GO

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)

Advanced search

LINE OF BUSINESS
☐ Annuities ☒ Life

LIFE PRODUCTS
Term

ACCOUNT VALUE
All values

OWNER/PARTICIPANT AGE
All ages

ISSUE MONTH
Select month

BIRTHDAY
Select month

INVESTMENT REQUIREMENTS
All investment requirements

SERVICE FEATURES
All service features

MARKET TYPE
All market types

OWNER'S STATE
All states

ISSUE STATE
All states

SHOW
All accounts

Reset advanced search Reset all GO

Search results: All
Number of records matching criteria: 870

EXCEL | XML | PRINT
CUSTOMIZED EXCEL

Records per page: 50

EXPAND ALL | COLLAPSE ALL | Show: All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

| OWNER/PLAN | CLIENT | ACCOUNT | PRODUCT | EFFECTIVE | INDEX ANNIVERSARY | VALUE | RIDERS | FACE AMOUNT |
|------------|--------|---------|---------|-----------|-------------------|-------|--------|-------------|
| | | | TERM- | | | | | |

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.

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