



## What is iGO e-App?

iGO e-App is an intelligent fillable form with carrier specific rules embedded. It enables you to electronically complete and process 100% in Good Order applications. It also improves your productivity so you can sell more insurance.

## What are the key features for iGO e-App?

- Intuitive User Interface - Improved Navigation and Workflow, Dynamic Alerts and Statuses, & Graphical Indicators
- Quick Access to Start a New Client or View All Existing Cases
- Sharing and Transfer Feature for Cases
- Enhanced Product Search Capabilities
- Consistent Look & Feel Across All Platform Applications
- iGO e-App Integration with AgencyWorks AMS
- Multi-Carrier Quotes - Generate Quotes for Multiple Carriers within One Integrated User Interface & Seamlessly flow Information from Quote to iGO e-App
- View / Print filled complete or incomplete forms at any time
- SAVE and UPDATE as many times as you like
- Print & wet sign to match your selling styles
- Customizable e-Signature (Click-Wrap & Digital Pad)
- Electronic submission

## What are the key benefits for iGO e-App?

- Speeds access to start a case and view an existing case
- Simplifies the tailoring of output to meet clients' needs through improved collaboration
- Allows you to enter quote data once and generate multiple carrier quotes
- Eliminates need to work in multiple environments via iGO e-App integration with AgencyWorks
- LifePipe™ (Term Quote) users can now auto-populate iGO e-App, eliminating the re-keying of data
- Reduce cycle time and get paid faster!
- Write more premium!
- Go Paperless with "iGO Green" and save on imaging, gas, and postage costs!
- Deliver forms that are 100% legible and in Good Order
- Trim 10-14 days after client signature to speed processing and sell 25% more!
- Improve the consumer experience!

## How do I register for a username and password?

Registering for a username and password is simple! All you have to do is fill in some basic information about yourself and answer a few security questions. As soon as you submit your form, an email is automatically sent to you with your username and a hyperlink for you to set up your password.

## How do I get trained to use iGO e-App?

All training materials, including videos, product collateral, a list of frequently asked questions, and iPipeline's iGO e-App Support phone number and email address can be found at: The iPipeline Customer Portal - <https://customerportal.ipipeline.com>

In addition, trainings are held via WebEx and Teleconference every Thursday from 3:00 - 4:00 pm ET. To register, go to: <https://www.customerportal.ipipeline.com/igo-e-app-help-desk/php>

## How do I access iGO e-App?

There are 3 way to access the iGO e-App.

- On your distributor or carrier Web Site, you will see an iGO e-App banner. This will allow you to login or register for a username and password.
- At the Forms Engine, you will notice another access point.
- Our Term Quote Engine now integrates with the iGO e-App. An additional feature you will see in the Quote Engine's Profile Page is the ability to customize your view to run quotes for iGO e-App carriers only. By viewing the results page, you will notice the green iGO e-App button. Selecting the button, your client's information will be pulled from the Quote Engine and populated throughout the carrier application of your choice.

## What tools do I need on my computer?

### Certified Browsers:

#### Windows:

Microsoft Internet Explorer v.11 & Edge  
Google Chrome, most recent stable version  
Firefox, most recent stable version

#### Mac OS & iOS:

Apple Safari, most recent stable version

### Mobile Devices: (Clickwrap e-Signature/Signing process ONLY)

#### Android:

Chrome, most recent stable version

#### iPhone:

Safari, most recent stable version

## What do the visual cues within iGO e-App mean?

- If you type the information in right within the e-Application, we will turn the respective **FIELD FROM YELLOW TO WHITE**.
- A **RED QUESTION MARK** underneath a particular section, points out that you have made a mistake and that you eventually need to come back and fix it.
- A **GREEN CHECKMARK** lets you know that a section is filled out correctly.

The image displays three screenshots of the iGO e-App interface to illustrate visual cues:

- Red Question Mark:** A red arrow points to a red question mark icon located below the 'Primary Insured' section in the top screenshot.
- Yellow Highlighted Field:** A yellow arrow points to a yellow highlighted field in the 'Date of Birth' section in the top screenshot.
- White Corrected Field:** A white arrow points to a white field in the 'Date of Birth' section in the middle screenshot, indicating a correction.
- Green Check Mark:** A green arrow points to a green checkmark icon in the 'Validate And Lock Data' section in the bottom screenshot.