



## **WELCOME TO IPIPELINE CONGRATS! YOU JUST SCORED ALL THE ESSENTIALS!**

### **WHAT IS ESSENTIALS?**

Essentials includes all the necessary tools to take your Life Insurance Sales processes digital.

The Essentials Bundle includes the following Online Tools

- ✓ Product Information
- ✓ Needs Analysis
- ✓ Downloadable PDF Forms
- ✓ Xrae
- ✓ LifePipe (Term Life Quoting)
- ✓ iGO e-App
- ✓ DocFast Policy Delivery
- ✓ InsureSight
- ✓ iService Administration Site

### **GETTING STARTED & WHAT TO EXPECT**

We are actively working to create and customize your tools for your organization. The above tools will be specific to You and can only be used to conduct business with your Agency.

Your iPipeline Customer Success Manager will reach out shortly to collect additional data points required to complete your Set Up & Training.

### **CUSTOMER PORTAL**

As an iPipeline Customer you have access to exclusive content via our Customer Portal. We invite and encourage you to create an account and take a look around.

[Click Here](#) and select REGISTER at the top of the page to create a Username and Password

### **ESSENTIALS: PRODUCT BREAKDOWN**

#### **PRODUCT INFORMATION:**

Accessible via a link on your website, your Agents can gain access to Product Information for 100's of Carriers, 1000's of Products and Product Types. Information includes Build Charts, Underwriting Requirements, Product Highlights, Age Limits, Face Amounts, and more.

[Learn more about Product Information](#)



## **NEEDS ANALYSIS**

An easy-to-use simple Needs tool gives your Agents and their Clients as sense of what their Insurance Needs might be.

[Learn more about Needs Analysis](#)

## **FORMS (DOWNLOADABLE FORM PACKAGES)**

The Forms Tool allows Agents and your Agency Staff to download PDF forms (often fillable enabled). Agents can customize their desired Forms packets and download or print those packets.

[Watch a Tutorial for Forms](#)

## **XRAE**

Xrae enables Agents and Agency Staff to create cases to obtain a more accurate representation of a client's health/health class. Xrae can generate a multi carrier, multi-impairment-based (if needed) health class rating or range based on Published and Unpublished Carrier underwriting guidelines.

[Watch a Tutorial for Xrae](#)

## **LIFEPIPE (TERM QUOTES)**

Also known as our term life quoter, the LifePipe quote tool enables Agents to Agency Staff to run multi-carrier quotes across 1000's of Carriers term life products. Agents may seamlessly port LifePipe quote data into iGO for easy e-Application completion.

[Watch a Tutorial for LifePipe](#)

## **IGO EAPP**

The leading electronic App in the Industry, iGO ensures in good order applications for digital straight through processing efficiencies. Forms, LifePipe and iSolve are integrated to iGO for increased efficiency, reducing duplicate manual data entry and/or room for error.

[Watch a Tutorial for iGO e-App](#)

## **DOCFAST EDELIVERY**

The industry's only multi-carrier policy delivery solution with access to receive policies digitally from Participating Insurance Carriers.

[Watch a Tutorial for DocFast](#)

## **INSURESIGHT**

A cloud-based analytics and benchmarking service that provides key insights into your business.

[Learn more about InsureSight Analytics](#)

## **ISERVICE ADMINISTRATION**

iService is the 'Brains' behind your Essentials Tools. iService controls what States, Carriers, Products, and other configurable selections your Tools display. You control your iPipeline Tool Content through iService Self Service Portal.

Access iService [Here](#)



## **WE ARE EXCITED TO WELCOME YOU TO THE IPIPELINE ESSENTIALS COMMUNITY!**

**If you have any questions, please do not hesitate to reach out or you can contact  
a member of the iPipeline Support Team via the following channels**

Phone: 1.800.641.6557  
*Essentials Inquiries Select OPT 1*

Email: [support@ipipeline.com](mailto:support@ipipeline.com)  
[Customer Portal](#)

I look forward to working with you.

