



Write more small group business with Alpha Quote®!

Alpha Quote®, Manulife Financial's time-saving quotation software, gives select plan advisors the ability to run quotes in their own office for groups of 2 to 24 employees. Just load a copy of Alpha Quote on your computer and you are ready to go! Contact your Manulife Financial AlphaPlus® Account Executive to see if you are eligible.

Alpha Quote features:

- a wide selection of standard options for small groups,
- an easy-to-use format run on your own computer,
- a time-saving data entry sheet, and
- a full range of client reports.

From launch to quote in minutes

- Our easy-to-use software program provides convenient and flexible access to quotations from Manulife Financial.
- You can run a quote in about 10 minutes, even in front of your client!
- Try out different options to meet client needs.
- You can even print an auto-filled application form once you are done!

Three different options to produce a quote

- Customize a quote based on your client's unique requirements – select **Create New Quote**.
- Produce a quote based on your "standard" plan design recommendations – select **Model After Existing Quote**.
- Fast-track the quote process by choosing Quickstart™ – a pre-defined package of benefits that ensures costs are kept to a minimum (ideal for "first-time buyers" of group benefits) – select **Create Quickstart Quote**.

Take control and proactively manage the sales cycle. No more waiting for quotes or alternates on new prospects – just load, run and write more business with Alpha Quote!

Using the Excel Spreadsheet Tool

It's easy! All you need to do is follow these simple steps...

From Alpha Quote

1. Click on the **Create Excel file** button on the 'Employee data' page and create your data file.
2. Click on the **Open Excel** button to access your file and enter the employee data – remember to click on **Validate and Save**.
3. Close Excel and return to Alpha Quote.
4. Click on the **Upload data from Excel** button.

New feature - Uploading data in one easy step!

Alpha Quote makes the quote process even easier now with the added convenience of uploading data in one simple step:

- Click on the **Upload data from Excel** button – Alpha Quote will prompt you to open the appropriate Excel file* and the employee data will automatically be uploaded to Alpha Quote so that you can continue generating your quote.

*You must use the Alpha Quote Excel Template for the upload feature to work. The template is located with your program files at: C:\Program files\Manulife Financial\Alpha Quote\Saved\Employee Data\Employee_Template.xlt

Additional Information

Entering the data:

- *Pre-populated fields:* For your convenience, a number of fields have been pre-populated (Initial, Last Name, Salary Period, Current LTD).
- *Auto-fill fields:* The Province and Class fields have a feature that copies down the first value you enter – it is up to you to change these fields if you have employees in different provinces and/or classes.
- *Complete data:* Please ensure that you populate each field to avoid any errors when copying data to Alpha Quote.

Validate and save:

This function will validate and save your data, then prepare it for upload to Alpha Quote. From this point, close Excel to return to Alpha Quote. Press the **Upload data from Excel** button to retrieve the data.

Useful Tips

- Use the Alpha Quote Excel Template with your clients to capture their employee data and save time. Once the template's been populated by your client, it only takes a click of the mouse to upload the data to Alpha Quote.
- The number of employees can be changed at any time when using the Excel spreadsheet – additional blank rows will appear once the 'Number of employees' field is changed. Remember to change the number of employees on the 'Client' page in Alpha Quote as well, to avoid any errors.
- You can now input either Age or Date of Birth – a real time-saver!
- When inputting Date of Birth or Date of Hire, the Excel spreadsheet offers two short cuts to populate the Month field correctly:
 1. *By number* - If you input '4' in the Month field, the Excel spreadsheet will recognize this entry as April.
 2. *By letter* - If you input 'ja' the spreadsheet will populate January.



Alpha Quote®, Quickstart™, AlphaPlus® and Manulife Financial Group Benefits products are offered through Manulife Financial (The Manufacturers Life Insurance Company).

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For more information on Alpha Quote 2.9 or AlphaPlus, please contact your Manulife Financial AlphaPlus Account Executive.

 **Manulife Financial**
With you every step of the way®