



Instructions for Using Zenith On-The-Go

1. Using the browser on your Blackberry or other PDA, type in this address:
go.zenithmarketing.com
2. Click the link for the program you want to visit (Case Status or Term/No Lapse UL Quotes).

For Case Status

3. Scroll to Username and Password fields and enter the information you use to access the Zenith Marketing Group website. Then click Log In. *If you do not have a Username and Password, you will need to register at www.zenithmarketing.com.*
4. You should now see a complete list of your cases in alphabetical order by client last name. Next to each name is the latest status and the date that status was assigned.
5. There are 3 filter options to narrow down the list which can be used alone or in combination:
 - You can scroll over and the 'Name' field and enter any part of the first or last name of the client you're looking for.
 - You can search by Status Type from the 'Status' drop down menu.
 - You can search by date from the 'By Date' drop down menu. The options currently available are 'Last 6 Months' and 'Year to Date'.

For Term/No Lapse UL Quotes

3. Scroll through and enter the correct client information: State, Birth date, Sex, Smoker/Tobacco, Health Class, Face Amount. Then click 'Continue'.
4. Scroll through and press enter to place a check mark next to each '**Term**' or '**U/L**' option you wish quoted.
5. At the bottom of the screen, you can choose the 'Premium Paid Mode' you wish to see. All modes include an 'Annual' premium for comparison.
6. Choose how many quotes you want to see. The default is set to 30, but you can choose as few as 10 quotes or as many as 50 quotes (if that many are available).
7. Click 'Compare Now'.
8. This will return a list of quotes sorted by the '**Term**' or '**U/L**' option you chose and lowest premium to highest within each option. Each entry will feature: Company Name, AM Best Rating, Premiums for Annual and the other mode you chose, Health Category, and Product Name.