



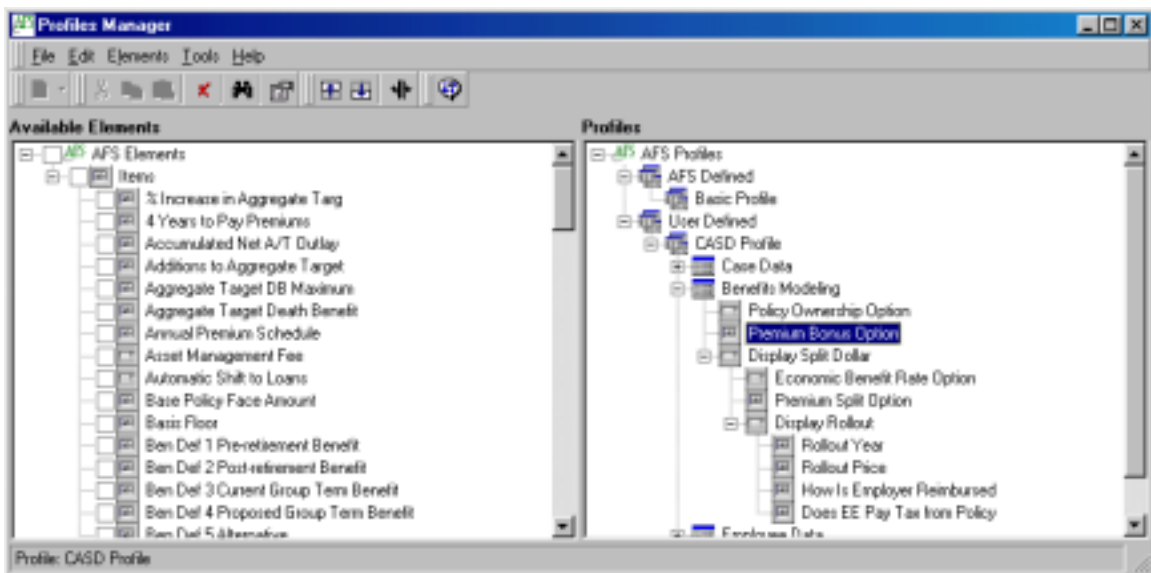
User Defined Case Profiles

Version 2.0 of the AFS Master System® introduces incredible flexibility by allowing the user to define customized case profiles. Similar to the “red trail items” contained in our DOS systems, but with much more sophisticated features, the User Defined Profiles determine which input fields will be displayed on the screen, where on the screen they are positioned, and even on which screen they appear!

Users can now set up templates for the most commonly used concepts. Why view dozens of unnecessary fields that you know in advance will not be relevant to your case? You can always restore the full range of items with a mouse click.

This feature is also a wonderful training tool. By removing fields that are not currently relevant, less experienced users can get comfortable with the fields needed for a particular illustration concept without being overwhelmed by the full range of possibilities provided by the AFS Master System®.

Like the new Report and File Managers, the Profile Definitions Manager makes it easy to administer your system profiles. The familiar tree view provides you with an overview of all your profiles: the AFS pre-defined basic profiles as well as those that you create yourself. The right-click shortcut menu will provide you with quick and easy access to the most common tasks.



As a simple example of the power of the User Defined profiles, by creating and applying a case profile, (in this case the profile named “CASD Profile”, shown above), the Benefits Modeling Screen for a Collateral Assignment Split Dollar case might change from this standard view:

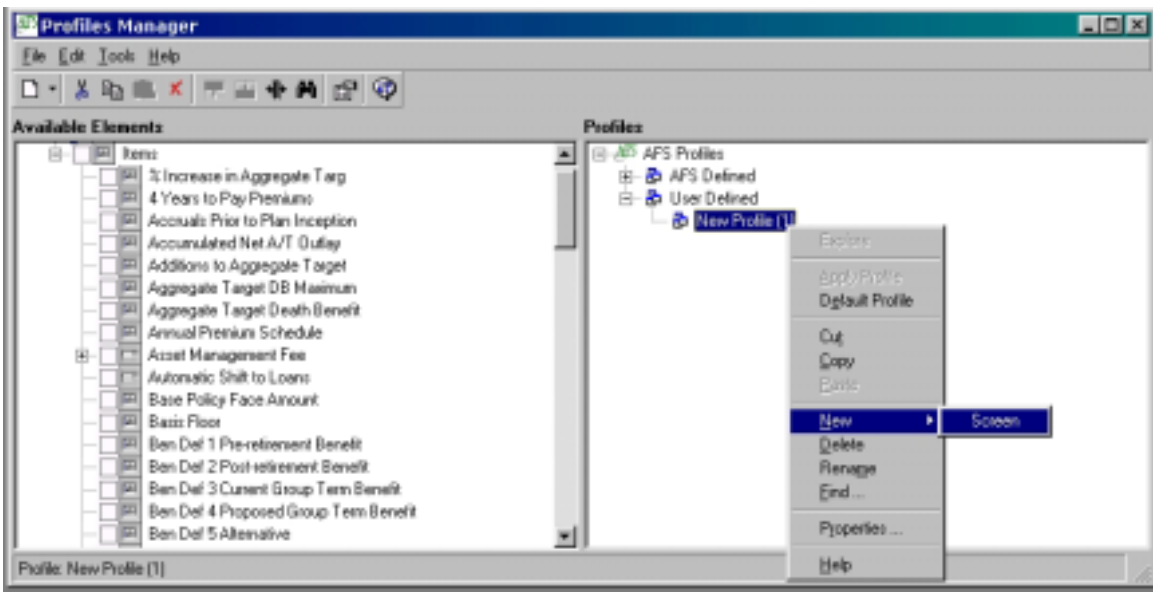
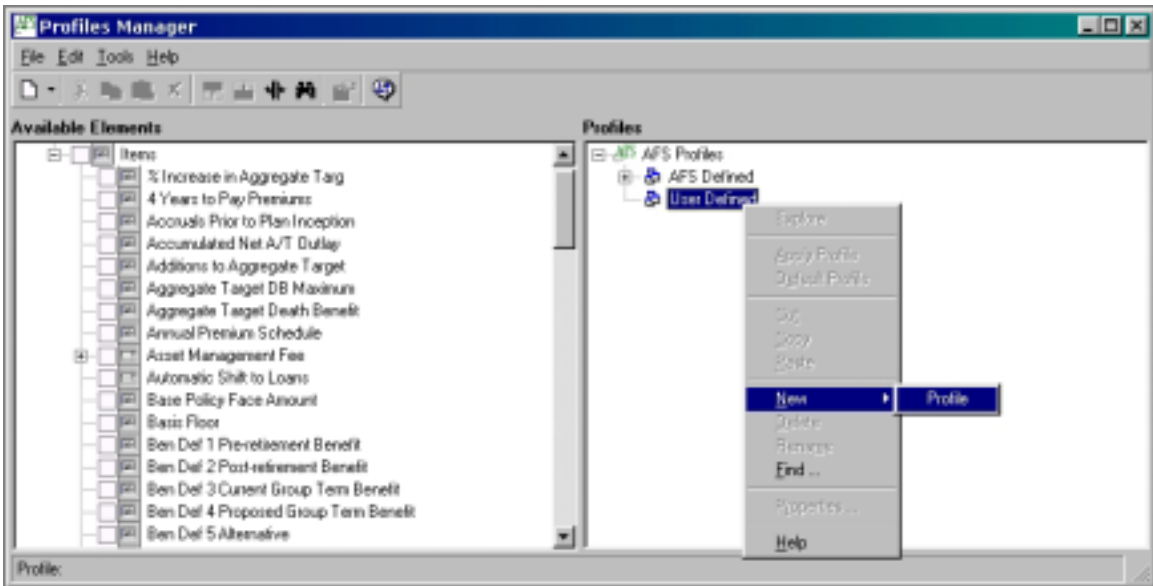
<input type="checkbox"/>	Policy Ownership Option	CASD
<input type="checkbox"/>	Premium Bonus Option	NONE
<input type="checkbox"/>	Display Group Carve-Out	No
<input type="checkbox"/>	Display Split Dollar	Yes
<input type="checkbox"/>	Economic Benefit Rate Option	4 - TERM,NO.DD
<input type="checkbox"/>	Premium Split Option	NONE
<input type="checkbox"/>	Death Benefit Split Option	NATO
<input type="checkbox"/>	Cash Value Split Option	3 - NATO
<input type="checkbox"/>	Coll.Assignmnt SD Tax Option	1 - S72
<input type="checkbox"/>	Display Rollout	Yes
<input type="checkbox"/>	Rollout Year	R+1
<input type="checkbox"/>	Rollout Price	FULL
<input type="checkbox"/>	How Is Employer Reimbursed	EE.WITHDRAWS
<input type="checkbox"/>	Does EE Pay Tax from Policy	Y
<input type="checkbox"/>	Display Death Benefit Only	No
<input type="checkbox"/>	Death Benefit Control	0
<input type="checkbox"/>	Display Sup. Executive Retirement Plan	No
<input type="checkbox"/>	Display Post-Ret. Medical Benefits	No
<input type="checkbox"/>	Display Deferral Plan	No
<input type="checkbox"/>	Ben Def 1 Pre-retirement Benefit	
<input type="checkbox"/>	Ben Def 2 Post-retirement Benefit	
<input type="checkbox"/>	Ben Def 3 Current Group Term Benefit	
<input type="checkbox"/>	Ben Def 4 Proposed Group Term Benefit	
<input type="checkbox"/>	Ben Def 5 Alternative	
<input type="checkbox"/>	Ben Def 6 Alternative	
<input type="checkbox"/>	Ben Def 7 Alternative	
<input type="checkbox"/>	Ben Def 8 Alternative	

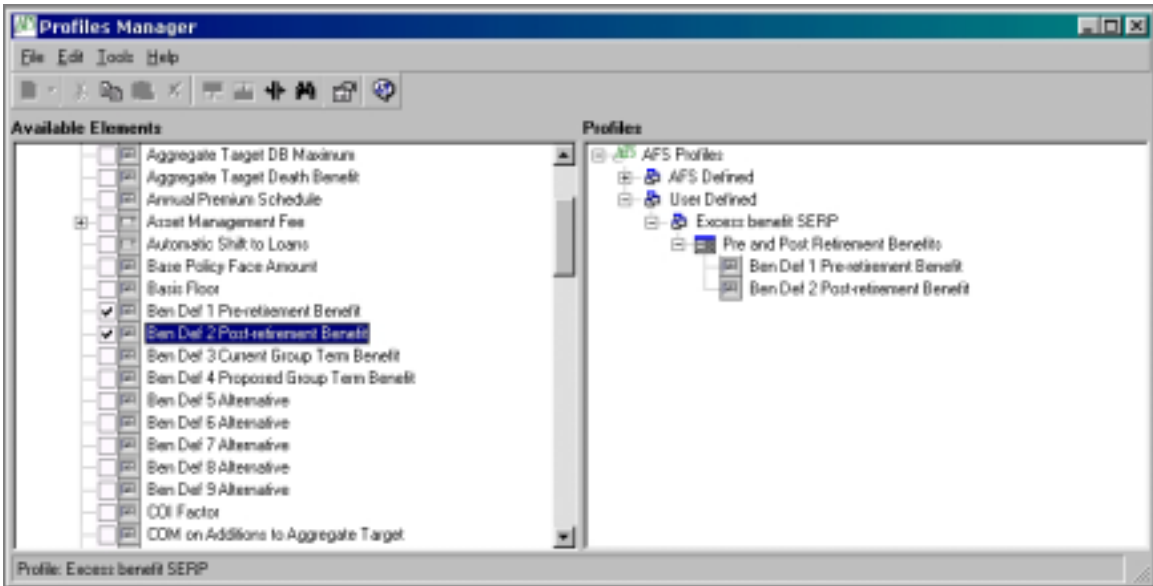
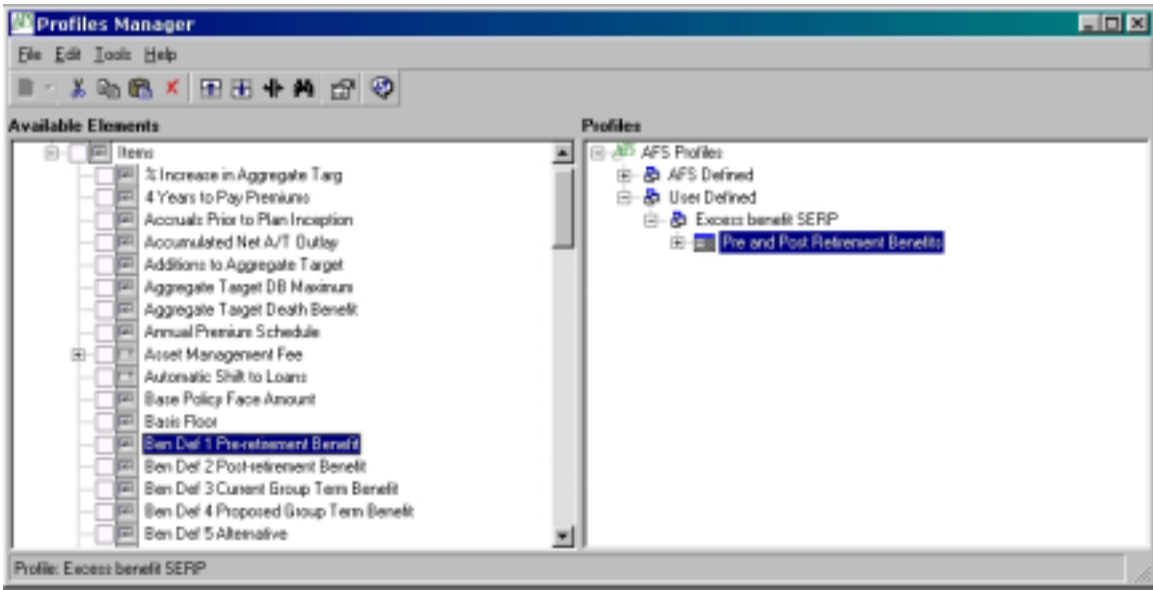
to this clearly organized and streamlined input screen:

<input type="checkbox"/>	Policy Ownership Option	CASD
<input type="checkbox"/>	Premium Bonus Option	NONE
<input type="checkbox"/>	Display Split Dollar	Yes
<input type="checkbox"/>	Economic Benefit Rate Option	4 - TERM,NO.DD
<input type="checkbox"/>	Premium Split Option	NONE
<input type="checkbox"/>	Display Rollout	Yes
<input type="checkbox"/>	Rollout Year	R+1
<input type="checkbox"/>	Rollout Price	FULL
<input type="checkbox"/>	How Is Employer Reimbursed	EE.WITHDRAWS
<input type="checkbox"/>	Does EE Pay Tax from Policy	Y

To create a brand new blank profile:

1. On the Tools menu, click [Profiles Manager](#).
2. In the Profiles view on the right pane of the window, click on the [User Defined](#) folder on the right pane.
3. [Right-click](#) to display the AFS Profiles Manager shortcut menu. Point to [New](#) and then click [Profile](#).
4. The [new profile](#) appears with a temporary name.
5. Type a name for the new profile, and then press [ENTER](#).
6. Create [input screens](#) as desired.
7. Select [items](#) for each input screen.





Note:

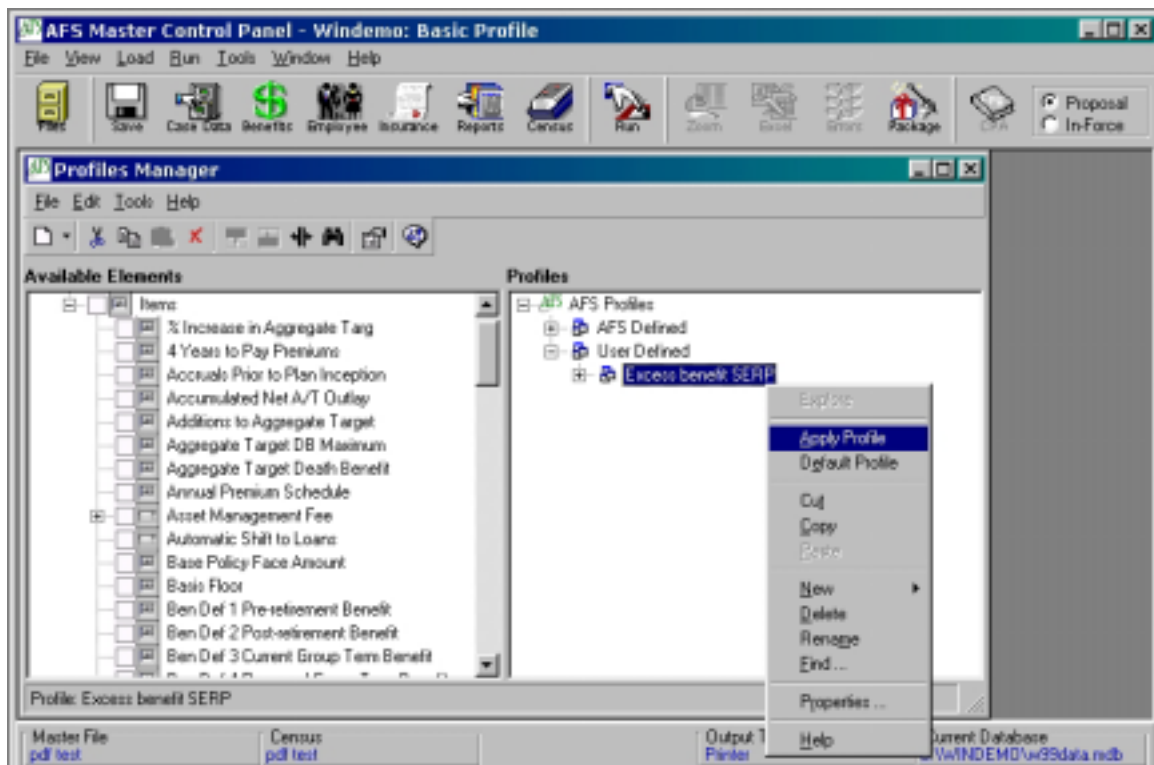
- A blank profile does not contain any input screens or any input items. You must create input screens for the profile and select input items for each screen.
- A profile must have at least one input screen and one item in order to be applied.
- Profiles may only be created under the User Defined folder.

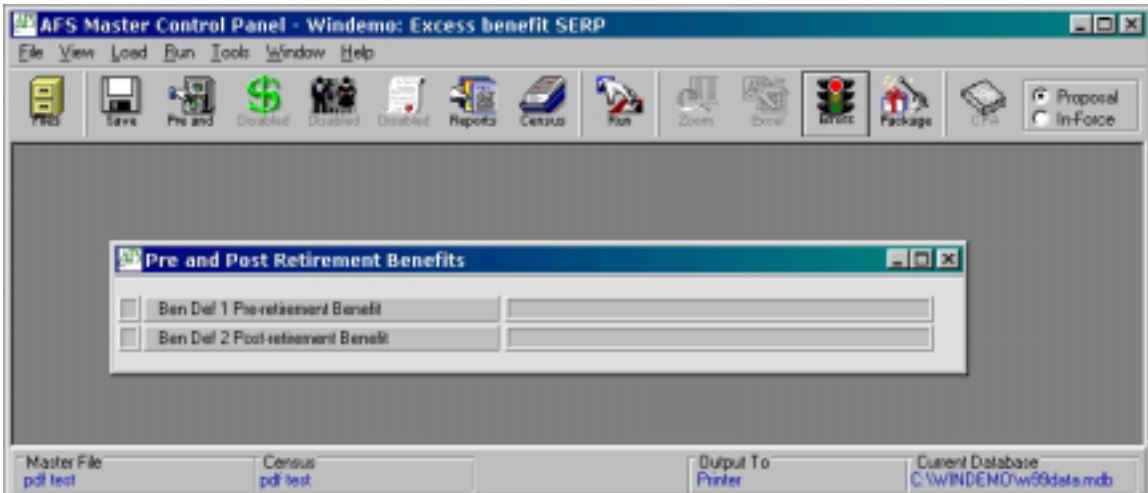
Applying a Profile

Once you have either selected an AFS defined profile or created your own, you must apply it to a file.

To apply a profile and use it to determine the input screens and items available:

1. On the **Tools** menu, click **Profiles Manager**.
2. In the Profiles view on the right pane of the window, click the **profile** that you want to apply to the system.
3. Right-click to display the **Profiles Manager shortcut menu**. Click **Apply**.
4. The system's input screens and items will be set as defined in the profile applied. The **toolbar buttons** for the input windows will be set to the screens defined in the profile.





Note:

- The name of the currently applied profile is displayed in the title bar of the AFS Master Control Panel window.
- You may not delete the currently applied profile.
- Right-click on Default Profile or apply the AFS Basic Profile, found in the AFS Profiles folder, to restore the system default.
- By applying a profile, you associate the profile with the currently opened case. Each time you open the case, the associated profile will be applied to it. To change this association, apply a different profile or apply the default profile to the case.

Apply the default profile:

To restore the standard display and arrangement of input items, use the 'default profile' option. This applies the AFS Basic profile that is shipped with the system. This profile, found in the AFS Profiles folder, contains the full complement of input items arranged in the familiar four input windows (Case Data, Benefits Modeling, Employee Data and Insurance Controls).

1. On the **Tools** menu, click **Profiles Manager**.
2. In the **Profiles** view on the right pane of the window, click on any profile.
3. **Right-click** to display the **Profiles Manager shortcut menu**. Click **Default Profile**.
4. The **AFS Basic Profile** will be applied to the current case.
5. The system's input screens and items will be set as defined in the **AFS Basic profile**. The toolbar buttons for the input windows will be set to the screens defined in the profile.

