Add a Feature to a Product and Feature Transaction Product

Procedures to associate a Feature to a product and to the feature transaction:
These procedures show how to add a feature and a feature transaction to a product. If you are a WIN client, it is very important to always follow the WIN Best Practices Guide. Refer to that document if you have any questions.

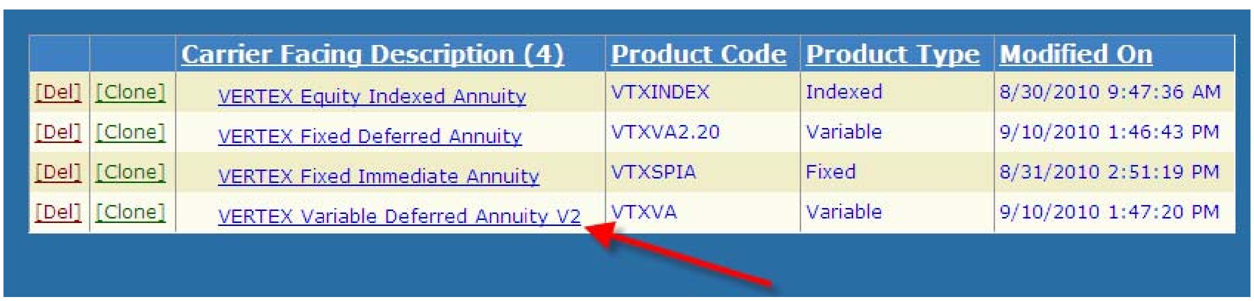
In all instances, there are 2 steps to add a feature on a product. Omitting the second step may result in PPfA upload errors. The 2 steps required at the product level are:

- Add the feature to the Product Features.
- Add the feature transactions to the Feature Transactions.

Add a feature to a product's list of features:
There are 2 methods that can be used to add the feature to a product, from the feature and from the product.

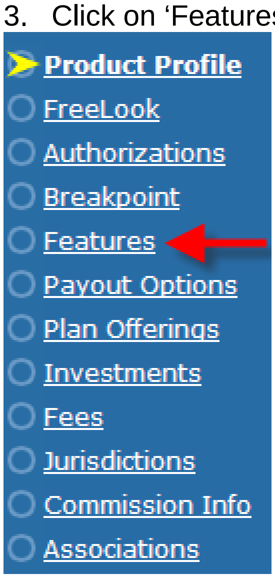
When adding the feature to a single product:

1. From the Product Profiles,
2. Scroll the list of products to find the product that needs the feature. Click the product name.

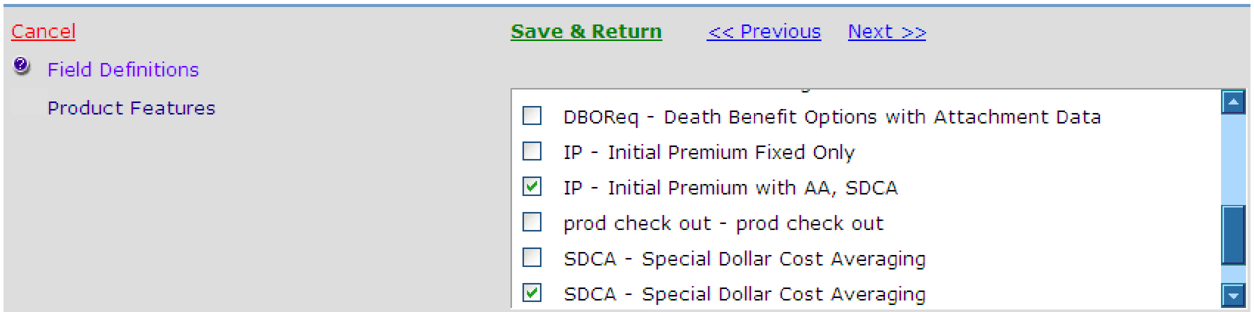


		Carrier Facing Description (4)	Product Code	Product Type	Modified On
[Del]	[Clone]	VERTEX Equity Indexed Annuity	VTXINDEX	Indexed	8/30/2010 9:47:36 AM
[Del]	[Clone]	VERTEX Fixed Deferred Annuity	VTXVA2.20	Variable	9/10/2010 1:46:43 PM
[Del]	[Clone]	VERTEX Fixed Immediate Annuity	VTXSPIA	Fixed	8/31/2010 2:51:19 PM
[Del]	[Clone]	VERTEX Variable Deferred Annuity V2	VTXVA	Variable	9/10/2010 1:47:20 PM

3. Click on 'Features' from the left navigation path.



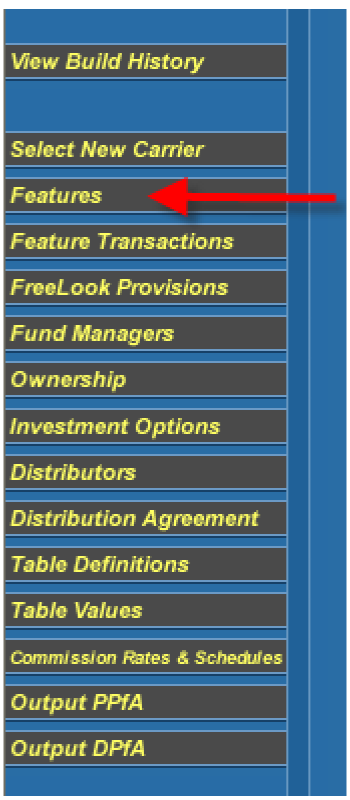
4. Scroll the list of features in the ‘Product Features’ list box. (Screen print displayed below)
5. Click on the feature’s check box to select it.



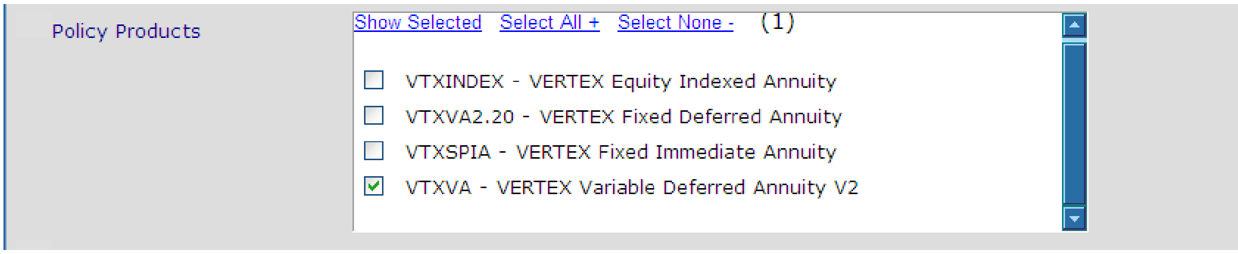
6. If replacing an existing feature with the new, click on the old feature’s check box to deselect it

When adding the feature to multiple products:

7. From the Product Profiles click on ‘Features’ from the left navigation path.



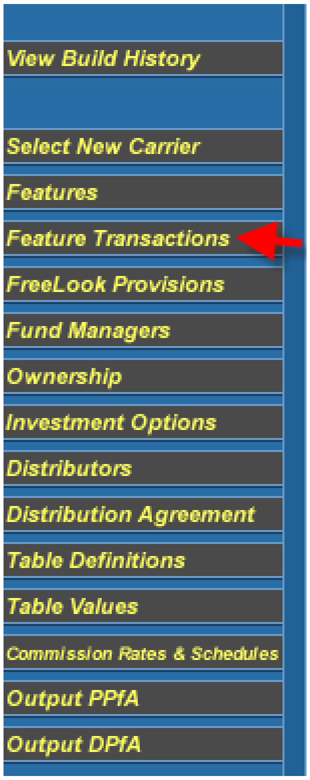
8. Select all products being associated from the Policy Products box.



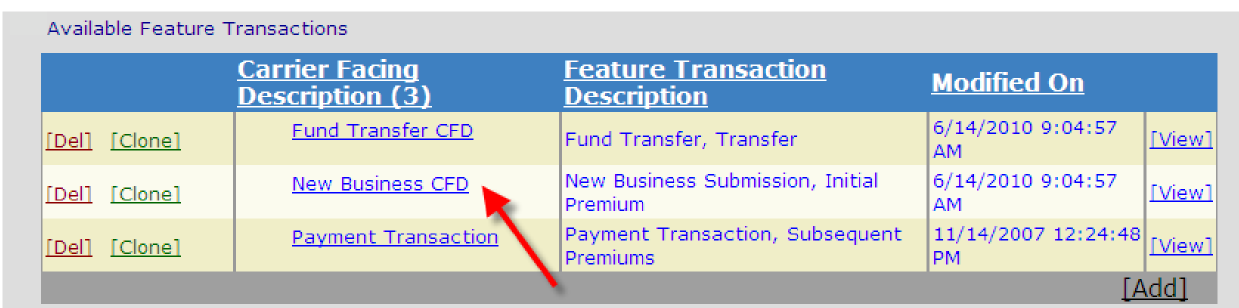
9. If replacing an existing feature with the new, Go to the existing feature and deselect the products selected in the previous step.

Add Feature to the Feature Transaction:

1. From the Product Profiles click on ‘Feature Transactions’ from the left navigation path



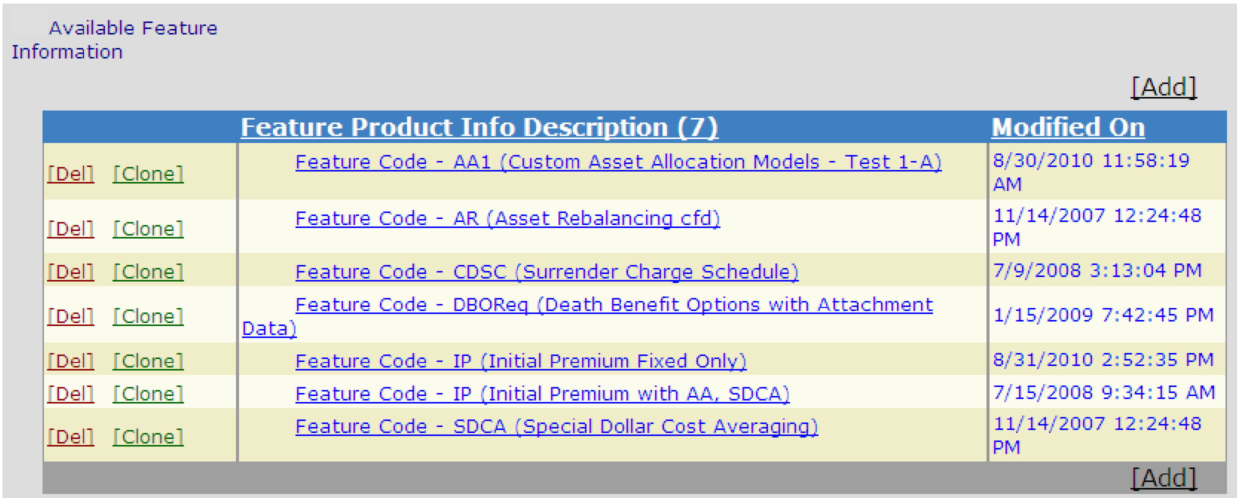
2. Select the Feature Transaction that is appropriate for the feature. For Features available for new sales, select New Business. For those available for additional premium transactions, select Payment Transaction. Finally, for those available during the Fund Transfer process, select Fund Transfer.


Available Feature Transactions

	Carrier Facing Description (3)	Feature Transaction Description	Modified On	
[Del] [Clone]	Fund Transfer CFD	Fund Transfer, Transfer	6/14/2010 9:04:57 AM	[View]
[Del] [Clone]	New Business CFD	New Business Submission, Initial Premium	6/14/2010 9:04:57 AM	[View]
[Del] [Clone]	Payment Transaction	Payment Transaction, Subsequent Premiums	11/14/2007 12:24:48 PM	[View]

[Add]

3. In the Available Feature Information section, click on [Add]. You can clone an option, but normally, this is not a necessary step.



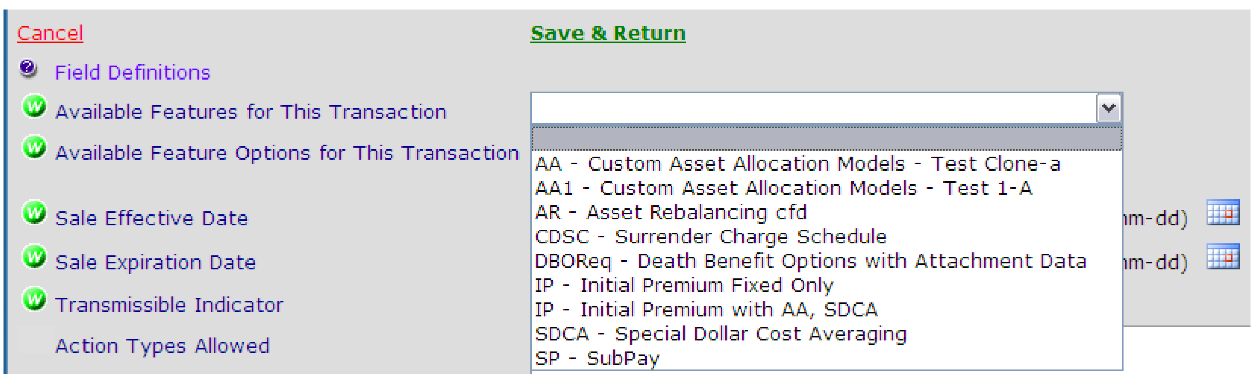
Available Feature Information

[Add]

	Feature Product Info Description (7)	Modified On
[Del] [Clone]	Feature Code - AA1 (Custom Asset Allocation Models - Test 1-A)	8/30/2010 11:58:19 AM
[Del] [Clone]	Feature Code - AR (Asset Rebalancing cfd)	11/14/2007 12:24:48 PM
[Del] [Clone]	Feature Code - CDSC (Surrender Charge Schedule)	7/9/2008 3:13:04 PM
[Del] [Clone]	Feature Code - DBOReq (Death Benefit Options with Attachment Data)	1/15/2009 7:42:45 PM
[Del] [Clone]	Feature Code - IP (Initial Premium Fixed Only)	8/31/2010 2:52:35 PM
[Del] [Clone]	Feature Code - IP (Initial Premium with AA, SDCA)	7/15/2008 9:34:15 AM
[Del] [Clone]	Feature Code - SDCA (Special Dollar Cost Averaging)	11/14/2007 12:24:48 PM

[Add]

4. Select the feature from the list under Available Features for this Transaction.
5. If only an option is available for the transaction, select the correct option from Available Feature Options for this Transaction.
   NOTE: These fields are mutually exclusive. Only select the Feature or the Feature Option.



6. Complete any additional fields as appropriate. Only the Feature or Feature Option information is required.
7. Click Save and return