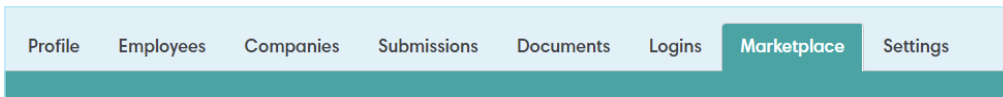# Ease Group Build Walkthrough
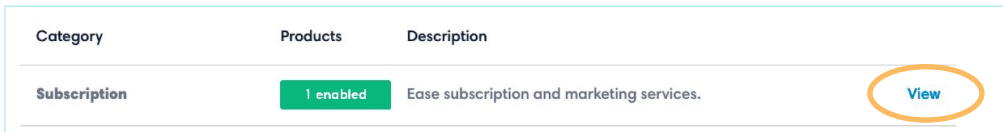
Enable the **Group Build** tile in the Ease marketplace.
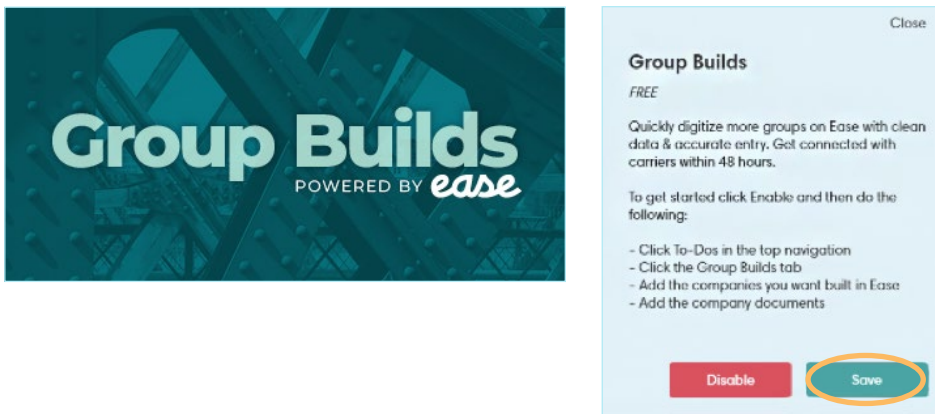
1. Select the **Marketplace** tab.

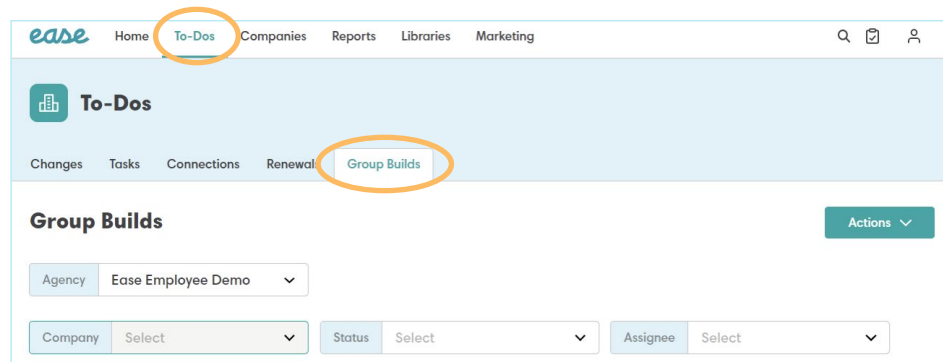| Profile | Employees | Companies | Submissions | Documents | Logins | Marketplace | Settings |

2. Find the **Subscription** category and click **View**.

Category	Products	Description	
Subscription	1 enabled	Ease subscription and marketing services.	View

3. Find the **Group Build** tile and select **Save**.

Group Builds

Close

FREE

Quickly digitize more groups on Ease with clean data & accurate entry. Get connected with carriers within 48 hours.

To get started click Enable and then do the following:

- Click To-Dos in the top navigation
- Click the Group Builds tab
- Add the companies you want built in Ease
- Add the company documents

Disable   Save

4. Once the tile is enabled, you will see the **Group Builds** tab under **To-Dos**. This tab will take you to your dashboard.

| Home | To-Dos | Companies | Reports | Libraries | Marketing |

To-Dos

Changes   Tasks   Connections   Renewals   Group Builds

Group Builds

Actions ∨

Agency   Ease Employee Demo

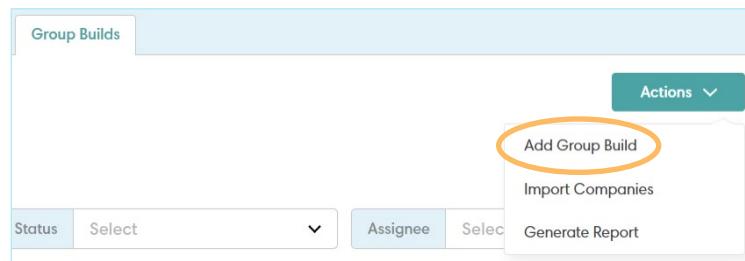Company   Select   Status   Select   Assignee   Select

Agency Group Build Dashboard

Your Agency Group Build Dashboard will be your window into all groups actively being built by a member of the Ease team. From this dashboard you can see the status a group is in, as well as who is currently assigned to the group.

There are **TWO WAYS** to add groups to your dashboard.

If the company is already in Ease:

1. In your dashboard, select **Actions** then click on **Add Group Build**.

Group Builds			
			Actions ⌄
			Add Group Build
			Import Companies
Status	Select ⌄	Assignee Selec	Generate Report

2. This will prompt a pop-up window that will allow you to add a company to the dashboard.

Add Group Build   Close

Company *
Select ⌄

Add Group Build
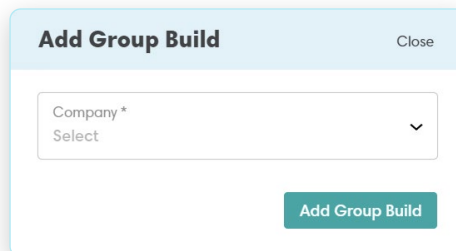
3. Once the group has been added, it will appear on your Agency Dashboard and automatically place the group in the Document Submission status. The assignee will default to whoever added the company to the dashboard.
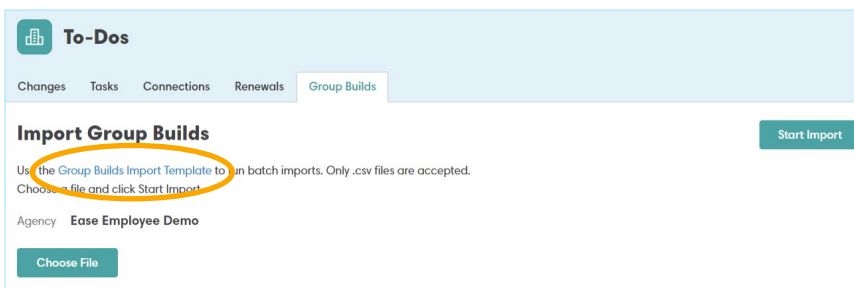
Ease Employee Demo	Demo - Group Build	Document Submission (8/31/22 - 26 days ago)	7	0	Edit

If the company is NOT in Ease:

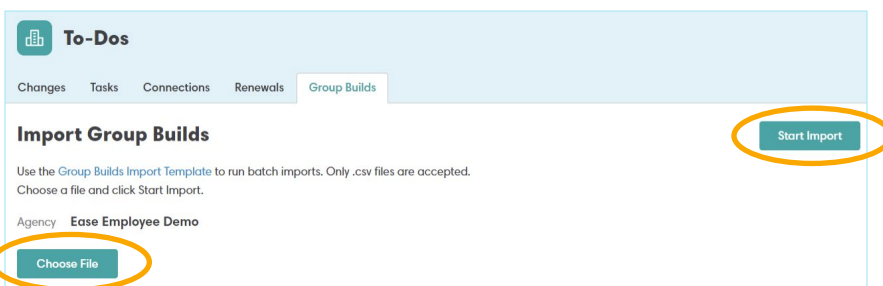**1.** Under the **Group Builds** Tab, select **Actions** then click on **Import Companies**.
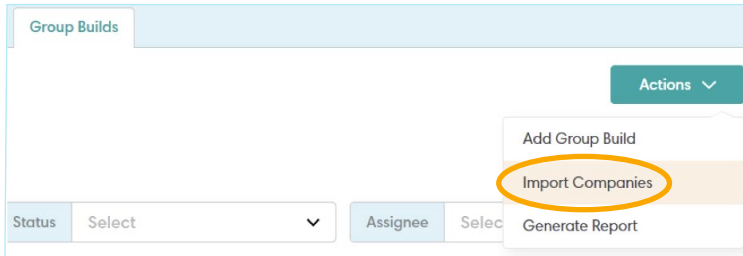
2. When selected, you will be taken to a screen that will allow you to create additional groups and add them to the dashboard all at once. Click on the hyperlink to open the **Group Build Import Template** — this will open an Excel spreadsheet in the format required to import.

HINT: *Only columns A,C,D, and E are required for import. Columns B, F, and G are there if the information is available.*

3. Once you have added all of the groups you want to, save the document (make sure it's saved as a .csv file). Go back to Ease and select **Choose File**. Select the file you saved and click **Start Import**. This will import all of the companies on the spreadsheet creating both a shell in Ease and a case in the dashboard.

4. Return to the Agency Group Builds Dashboard and you will see the groups that have been added.

REMEMBER: *Groups added either through the import (or manually) will automatically be placed in the status of Document Submission with the assignee as the person who added it, unless indicated otherwise.*

Group Dashboard

To upload documents, review notes, or change the status of an individual group, begin by clicking on the **Edit** hyperlink.

This takes you to the group's dashboard.

In the blue box there is a hyperlink to download the **Group Build Workbook**. This workbook is designed to be a reference tool for what information is needed to complete the build. If the information is available in a different format, e.g., SBC or Benefit Summary, then it is not necessary to add that information to the workbook. For a list of acceptable documents, please refer to the [Broker Document Submission Guide](#).

Use the **Group Build Workbook** for submitting plan & employee information.

Upload all applicable documents below. If there are multiple documents per plan please separate them in folders.
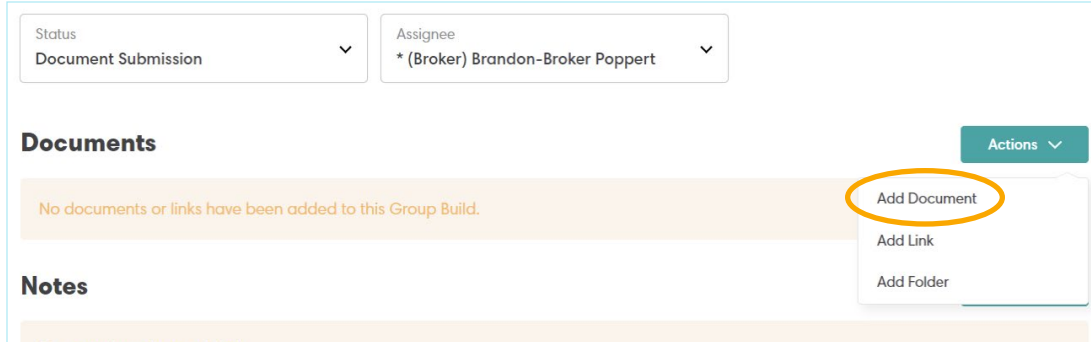
Once all documents have been uploaded click 'Ready to Build'.

Ready to Build

Documents

Now you're ready to begin uploading **documents**. Follow these steps to add documents to the group's Group Build dashboard.

1.   Select the **Actions** button in the Documents section and click on **Add Document**.

Status
Document Submission

Assignee
* (Broker) Brandon-Broker Poppert

Documents   Actions ∨

No documents or links have been added to this Group Build.   Add Document

                                                                                        Add Link

Notes   Add Folder

2.   A pop-up will appear that will allow you to select the files you wish to upload.

File Upload   Close

Drag and drop your files   **Browse Files**
or folders here.

3. Once you have selected the file, a window will appear that allows you to change the name, or add any pertinent information about the document. Once you have finished, select **Save**.
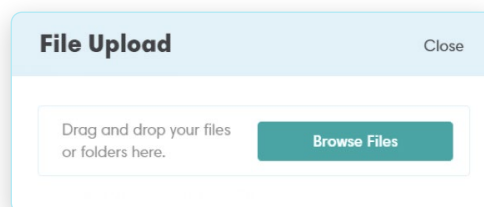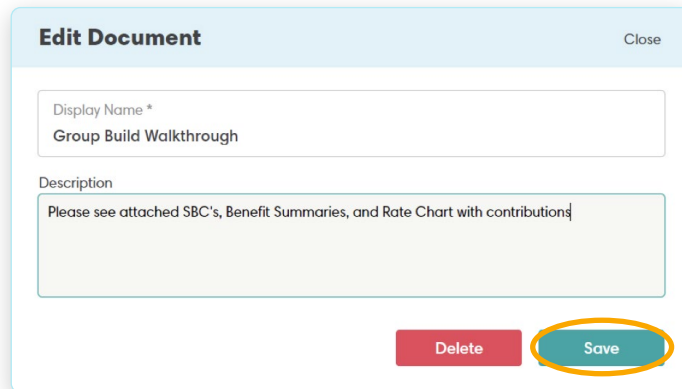
Edit Document   Close

Display Name *
Group Build Walkthrough

Description
Please see attached SBC's, Benefit Summaries, and Rate Chart with contributions

Delete   Save

4. You will now see the document in the group's dashboard, as well as the description you entered.

Documents   Actions ⌄

Name	Description	Size	Date	
📄 Group Build Walkthrough	Please see attached SBC's, Benefit Summaries, and Rate Chart with contributions	4.9 MB	9/27/2022	Edit

HINT: *The description box of the document is a great place to leave a note that might be pertinent to a particular plan.*
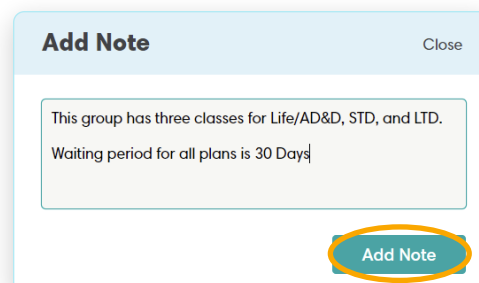
Notes

You are able to use the **Notes** section to add notes pertaining to multiple or all plans as well as any information the team should know. Once added, these notes will be visible to anyone working the group.

1. Select **Add Note** in the notes section.

Notes   Add Note

No notes have been added.

2. A window will appear that will allow you to add any information. You can add as many notes as you'd like, so don't feel like you have to add everything to one. Once finished, click on the **Add Note** button.

Add Note   Close

This group has three classes for Life/AD&D, STD, and LTD.

Waiting period for all plans is 30 Days

Add Note

3. Repeat this process as many times as you'd like. You will see the notes appear in the notes section.

Notes			Add Note
Note	Added By	Date	
This group has three classes for Life/AD&D, STD, and LTD.	Brandon Poppert (You)	9/27/2022	Edit
Waiting period for all plans is 30 Days			

HINT: *This section is how we will communicate with one another, so be sure to keep an eye out for any updates!*

Once you have uploaded all notes and documents, and the group is ready to be built, return to the blue box at the top of the page. Click on **Ready to Build**.

Group Build

View Group Builds   Delete Group Build

Agency	Ease Employee Demo	Created	9/6/2022 - 21 days ago

Company	Group Build - Demo	Plans	4	Employees	0	Status	Document Submission

Use the **Group Build Workbook** for submitting plan & employee information.

Upload all applicable documents below. If there are multiple documents per plan please separate them in folders.

Once all documents have been uploaded click 'Ready to Build'.

Ready to Build

Status
Document Submission

Assignee
* (Broker) Brandon-Broker Poppert

A window will appear allowing you to accept the SOW. Once you click the **Ready to Build** button, the group's status is automatically updated and added to the Ease team's queue. We will take it from here! Remember to keep an eye on the notes section for any questions we may have.

Ready to Build   Close

Agree to the Statement of Work below and click 'Ready to Build'. Ease will then begin the building process.

☑ I agree to the Group Building Statement of Work (SOW) & authorize payment if responsibilities are not met

Ready to Build

ease

Because benefits matter.

Status Key & Timeline

Document Submission:

Group is assigned to the Broker and awaiting documents.

– Up to 14 days. After 14 days, the group will remain in Ease, but it is removed from the queue.

Ready to Build:

Group is added to the queue, and documents are reviewed by the Ease team.

– One business day

In Progress:

Member of the build team assigns the group and completes the build.

– One business day

Ease Review:

Group is assigned to a team lead, and a QA check is performed.

Connection process is started (completed if API connection).

– Up to five business days

Broker Review:

Group is reviewed by the broker for any changes or updates that need to be made.

– Up to five business days. After five business days, groups are automatically moved to completed status.

Request Changes:

Group is reassigned to the team member that built the group, and any requested changes are made.

– One business day

Complete:

Group has been completed and is ready for utilization.