

PenEasy Quick Start Guide



BLAZE SSI Box 333 Brielle, NJ 08730

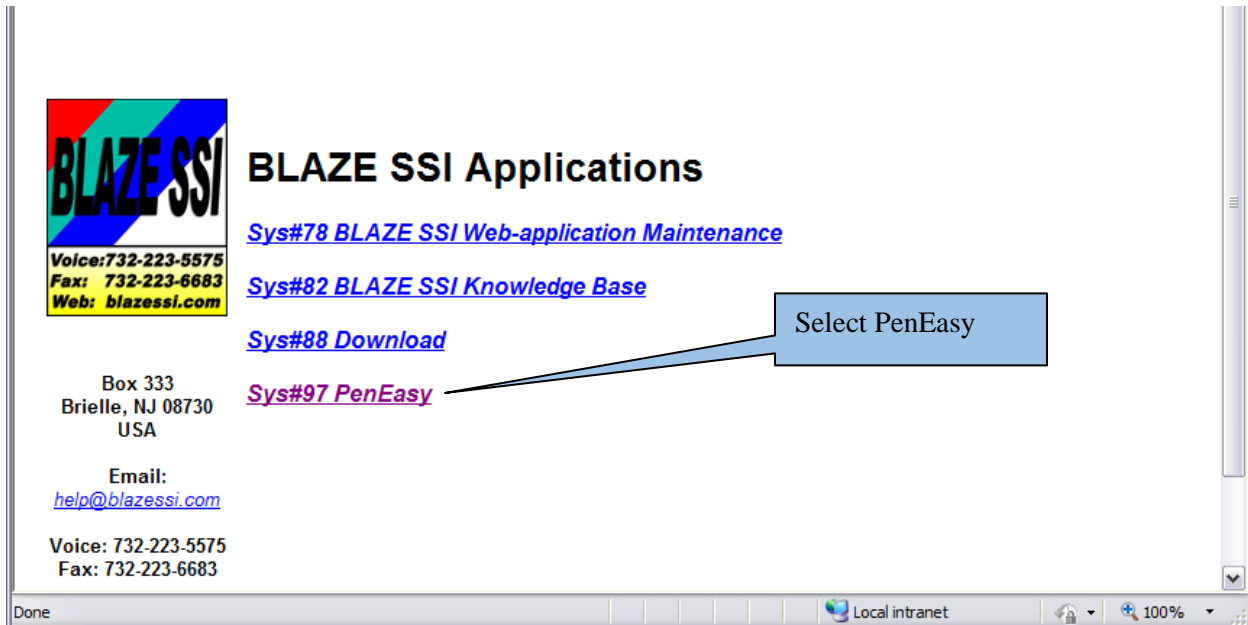
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PenEasy Quick Start Guide

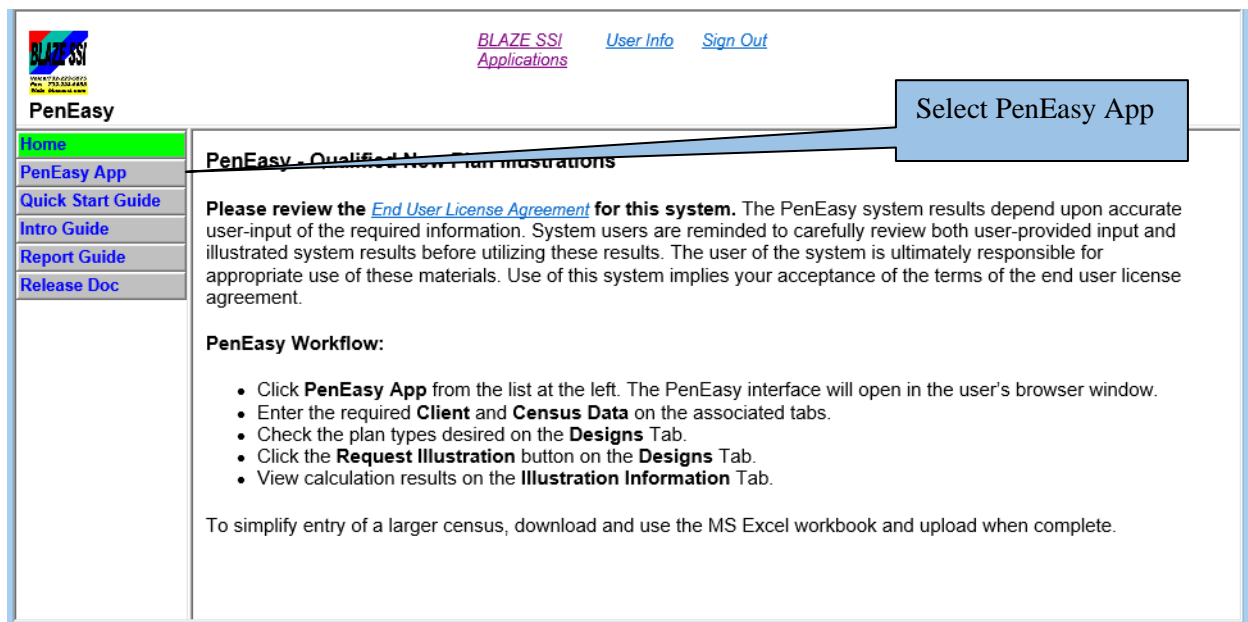
Quick Start

Using PenEasy is Easy!

Start by entering your User Credentials on the blazessi.net Sign-In Page.
At the next screen, select PenEasy from the list of BLAZE SSI Applications.



From the PenEasy home screen, select the PenEasy App to access the system.



PenEasy Quick Start Guide

The User Interface has six tabs: **Client**, **Census**, **Designs**, **Illustration Information**, **Advanced** and **Reports**.

BLAZE SSI Applications User Info Sign Out

PenEasy

- Home
- PenEasy App
- Quick Start Guide
- Intro Guide
- Report Guide
- Release Doc

Client | **Census** | Designs | Illustration Information | Advanced | Reports

Client Name: Salmon Enterprises Corp

Designer Name: Benefit Designers Plus Inc. x

Effective Date: 1/1/2014

Plan Sponsor Contribution Budget Type: Maximum v

Plan Sponsor Contribution Budget Amount: 0

Use the **Client** Tab to enter Client Data – only 5 fields!

BLAZE SSI Applications User Info Sign Out

PenEasy

- Home
- PenEasy App
- Quick Start Guide
- Intro Guide
- Report Guide
- Release Doc

Client | **Census** | Designs | Illustration Information | Advanced | Reports

Enter Required Fields (Headings with Yellow Background) For All Employees

	Last Name	First Name	Sex	Birth Date	Hire Date	Ann Pay	Owner % Officer	401(k) Deferral \$Amt/-%Pay	Pref EE
Delete	Employee1	EE	F v	01/01/1970	01/01/1980	500000	100 <input checked="" type="checkbox"/>	10000	<input type="checkbox"/>
Delete	Employee2	EE	F v	01/01/1975	01/01/2000	50000	0 <input type="checkbox"/>	1000	<input type="checkbox"/>

Export to Excel Browse... Import from Excel

Use the **Census** Tab to enter one or more (up to 100) employees – only 8 required fields!

You may choose to import census data from an Excel file.

https://www.blazessi.net/Logon/

PenEasy Quick Start Guide

BLAZE SSI Applications User Info Sign Out

PenEasy

Home PenEasy App Quick Start Guide Intro Guide Report Guide Release Doc

Client Census **Designs** Illustration Information Advanced Reports

Cash Balance DB Plan:
 Traditional Accrual DB Plan:
 Traditional Profit Sharing Plan:
 New Comparability Profit Sharing Plan:
 Simplified Employee Plan:
 Simple IRA Plan:
 Simple 401(k) Plan:

Request Illustration

Select up to 4 plan types to run from the **Designs** tab.

Now click 'Request Illustration'. That's it!

BLAZE SSI Applications User Info Sign Out

PenEasy

Home PenEasy App Quick Start Guide Intro Guide Report Guide Release Doc

Client Census Designs **Illustration Information** Advanced Reports

Refresh Illustration Information Save Current Input Locally Browse... Open Local Input

	Client Name	Request DateTime	Completion DateTime	Status	Status Message	View Illustration	TX#	Warning Message
Open	Testing Rates	4/14/2015 7:57:02 PM		NA	Results not yet available			
Open Delete	Testing Rates	2/3/2015 7:11:23 PM	2/3/2015 7:11:51 PM	OK		Click for Illustration	3432	Message: [041_03 Plan design# 1 - Warning: Projectec
Open Delete	Testing Rates	2/3/2015 7:09:18 PM	2/3/2015 7:09:47 PM	OK		Click for Illustration	3431	Message: [041_02 WARNING: 141DF DV#47 (INTEG TA
Open Delete	Testing Rates	2/3/2015 7:04:54 PM	2/3/2015 7:05:23 PM	OK		Click for Illustration	3430	Message: [041_02 WARNING: 141DF DV#47 (INTEG TA
Open Delete	Testing Rates	2/3/2015 7:02:23 PM	2/3/2015 7:02:52 PM	OK		Click for Illustration		Message: [041_03
Open	Testina	2/3/2015	2/3/2015			Click for		Message: [041_03

Use the **Illustration Information** Tab to view information about the illustrations that you have run.

Click a link in this column to view the PDF illustration.

If the 'Click for Illustration' link is not available; click the '**Refresh Illustration Information**' button to refresh the data on this Tab; it may take a few minutes to get the results of the calculations.

PenEasy Quick Start Guide

The **Illustration Information Tab** can be used to review illustrations run previously; view status of illustrations not yet completed; view error messages and save and open data.

Consult the complete **PenEasy Intro Guide** for more comprehensive information regarding the operation of the system.