

SmartOffice 2009 BGA Webinar Series

2009 BGA Webinar Series: Set-up and Use of SmartOffice Licensing & Appointment Feeds

*Welcome! This Webinar will
be 30 minutes in length.*

Dial-in: 712-432-3900
Pin: 984124



Agenda

AGENDA		
July 16, 2009	Topic	Time
	Welcome and Introduction Meg Rose, FLMI, ACS Business Relationship Manager E-Z Data	5 minutes
	Licensing and Appointment Feed Set-up and Use in Smart Office Blake Edmondson BGA Support Services	20 minutes
	Q&A Session <i>BGA Participants</i>	5 minutes

Focus of Today's Session

Licensing and Appointment Feeds in SmartOffice

- **How to Request Set-up for Feeds from E-Z Data**
- **Types of Tracking, Use of Feeds, and Other Options and Functionality**
- **Current Options and Future Availability – You Can Help!**

A Closer Look at Licensing and Appointment Tracking in SmartOffice

Blake Edmondson
BGA Support Services, E-Z Data

Takeaways from Today's Session

1. Automated Updated on Appointments Available from Prudential and Mutual of Omaha – request from bgasupport@ezdata.com
2. Advantages of Agent Appointment Status Tracking in SmartOffice Case Processing
3. How You Can Reach Out to Carriers to Help Us Increase L&A Feeds in SmartOffice

Annual BGA CPC is Fast Approaching

- > *September 13-15, 2009*
- > St. Louis, MO
- > Exceptional learning and networking opportunities
- > New Pre-Conf Session Sun afternoon
- > User Driven - Input from BGA Advisory Council
- > Take Me Out to the Ball Game – It's fun too!
- > Register at: www.ezdata.com/bga



Next BGA Webinar

Correspondence Series: Working with Merge Codes in SmartOffice

7.30.09 at 2pm ET

Watch for E-mail Invite Coming Soon!

We Want Your Input

How Can We Be a Better Business Partner?

Suggestions for topics or to request further
business development and partnership
opportunities?

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*Thank you for your time
and your business.*