

SmartOffice 2009 BGA Webinar Series

2009 BGA Webinar Series: Using Merge Codes for the Brokerage General Agency

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

Dial-in: 712-432-3900

Pin: 984124



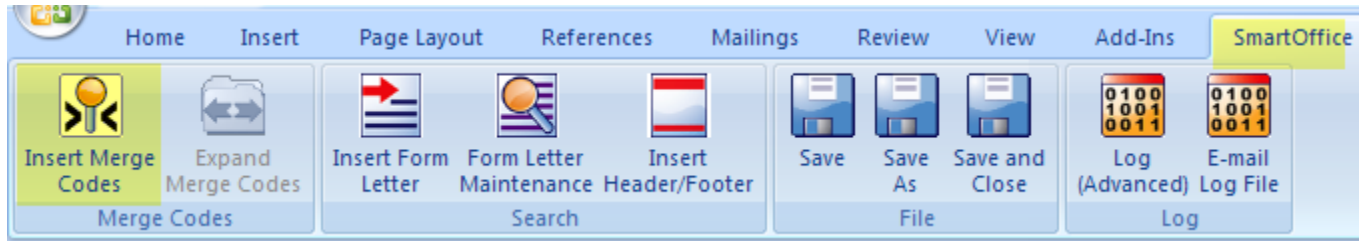
Agenda

AGENDA		
July 29, 2009	Topic	Time
	Welcome and Introduction Meg Rose, FLMI, ACS Business Relationship Manager E-Z Data	5 minutes
	Merge Codes for the Brokerage General Agency Nancy Edwards, Training Consultant E-Z Data	20 minutes
	Q&A Session <i>BGA Participants</i>	5 minutes

A Closer Look at Merge Codes for the BGA in SmartOffice

Nancy Edwards, Training Consultant
BGA Support Services, E-Z Data

Using Merge Codes in BGA Correspondence



Today's Focus

1. Corresponding within SO with focus on PCM
2. Creating a letter one time merging multiple fields, reusable for multiple carriers and clients.
3. Advanced features for the seasoned users (new or untapped functionality with SO)

Using the SmartOffice Document Tool Bar

Underwriting Req Letter To Agent_ne [Compatibility Mode] - Microsoft Word

Home Insert Page Layout References Mailings Review SmartOffice

Insert Merge Codes Expand Merge Codes Insert Form Letter Form Letter Maintenance Insert Header/Footer Save Save As Save and Close Log (Advanced) E-mail Log File

«Date»

«AdvisorName»

«AdvisorAddress»

RE: Insured: «PrimaryInsuredName»
Carrier: «CarrierName»
Policy Number: «F_PLCY_NO»
Face Amount: \$«F_LIFE_FACEAMOUNT»

Dear «AdvisorGreeting»,

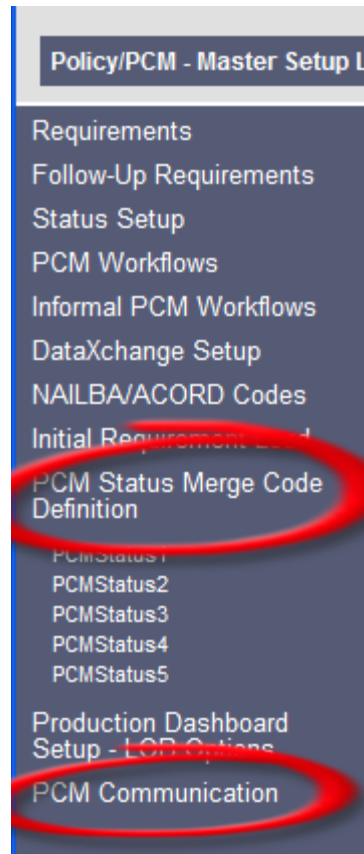
Please be advised of the status of the Underwriting Requirements for the at referenced case is as follows:

«PCMStatus4»

«UserInput 1»



Navigating to PCM Set Ups



The “Key” to Creating Your Own PCM Status Display Merge Code



Follow-Up Requirements
Status Setup
PCM Workflows
Informal PCM Workflows
DataXchange Setup
NAILBA/ACORD Codes
Initial Requirement Load
PCM Status Merge Code Definition
PCMStatus1
PCMStatus2
PCMStatus3
PCMStatus4

Miscellaneous

Merge Code **PCMStatus4**
Condition **All Requirements**
Type **Underwriting Requ**

Requirement Columns

Column1	Description
Column2	Status
Column3	Status Date
Column4	Remarks
Column5	
Column6	




Merge Code Browser

Select
 Merge Code List Table / Field Names

Merge Code List

Policy / Pending Case Management	PCMStatus1
Policy List	PCMStatus2
POS Requirements	PCMStatus3
POS Requirements - Individual	PCMStatus4
Proposal Tracking	PCMStatus5
Requirements	PrimaryAdvisorContractName
Requirements - Individual	PrimaryAdvisorHouseContractNum
Rider	PrimaryAdvisorInterest
Run-Time User Input	PrimaryAdvisorMarketingManager
Sales Rep	PrimaryAdvisorOfficeCode
Spouse	PrimaryAdvisorRegionCode
User	PrimaryAdvisorRelation
Web Survey	PrimaryContact




PCMStatus4 - User defined Merge Code

Insert Close

Up to 10 User Input Prompts are available at “Runtime”

artOffice -- Webpage Dialog

General Information

Category: **Advisor Letters** 

Title: **Und. Req To Advisors_ne2**

Keyword:

Purpose: **PCM/UW - Addressed to Advisors**

Expires On:

AA Protected: **N/A**

Do not allow deletions/modifications by other users

Format: **RTF**

Status: **Active**

Type: **Form Letters**

Created On: **07/27/2009 06:24PM** By: **Nancy Edwards**

Runtime User Input Prompts


User Input 1	Add Text To Agent Here If Need
User Input 2	
User Input 3	
User Input 4	
User Input 5	
User Input 6	

Merge Code Browser

Select

Merge Code List Table / Field Names

Merge Code List

Informal Application Requirement		UserInput1
Intellisys		UserInput10
Office		UserInput2
Policy / Pending Case Management		UserInput3
Policy List		UserInput4
POS Requirements		UserInput5
POS Requirements - Individual		UserInput6
Proposal Tracking		UserInput7
Requirements		UserInput8
Requirements - Individual		UserInput9
Rider		
Run-Time User Input		
Sales Rep		

Runtime user input - 1

Communicate consistently and provide more information to clients and now... with even less effort

Let me show you how I make the SmartOffice database work for me!

From: Nancy Edwards [nancy.edwards@ez-data.com] Sent: Tue 7/28/2009 4:04 PM
To: nancy.edwards@ezdata.com
Cc:
Subject: Re: Randy Sands; ABC Life; 25000-4338; A23333333

Message | Revised Illustration.docx (10 KB)

RE: Insured: Mr. Randy Sands
Carrier: ABC Life
Face Amount: \$500,000

Dear Bob,

Please be advised of the status of the Underwriting Requirements for the above referenced case is as follows:

All Underwriting Requirements For:Randy Sands

Description	Status	Status Date	Remarks
Attending Physicians Statement	Outstanding-Service Provider	07/20/2009	Dr. returning week of 8/3/09
Replacement Form	Outstanding-Insured	07/20/2009	
Illustration - Revised	Received	07/27/2009	

Attached is a revised illustration.

If you have any questions, please call me at (626) 585-3505 Ext. 7363.

Sincerely,

Nancy Edwards, Case Manager
nancy.edwards@ezdata.com
Telephone: (626) 585-3505 Ext. 7363
Fax: (916)444-5555

Takeaways from Today's Session

1. Ease of **modifying merge codes in form letters** to meet your communication needs
2. Using the **PCM Merge Codes** to provide your advisors with quick status of Underwriting Requirements
3. Using the **Run-Time User Input** feature to personalize form letters

Training Team and Tech Support 626-585-3515 are available to help!

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

Special Edition:
**SmartOffice Communications
Advantages with Prudential**

8.06.09 at 2pm ET

Watch for E-mail Invite Coming Soon!

Further Questions?

E-mail: bgasupport@ezdata.com

Phone: (434) 522-4069

How Can We Be a Better Business Partner?

E-mail: meg.rose@ezdata.com

Phone: (626) 585-3505 x7366

Thank you for your time and your business.