

SmartOffice 2009 BGA Webinar Series

BGA Reporting: Introductory Reporting Concepts

Welcome! This Webinar will be 30 minutes in length.

Please dial into: 218-486-7200
Code = 171058



Agenda

AGENDA		
March 26, 2009	Topic	Time
	Welcome and Introduction Meg Rose, FLMI, ACS Business Relationship Manager E-Z Data	5 minutes
	Introductory Reporting for BGAs Marlon Urias, Manager, Support & Training Services E-Z Data	20 minutes
	Q&A Session <i>BGA Participants</i>	5 minutes

Using iLINC 10

> iLinc Version 10

The screenshot displays the iLinc 10 web browser interface for a session titled "BGA Webinar Series". The window title bar shows "iLinc | BGA Webinar Series" and standard OS window controls. The menu bar includes "File", "Edit", "Controls", "Tools", "Session", and "Help". The top toolbar contains icons for video, audio, chat, and other session controls, along with the "Dial In Number: 218-486-7200" and "Passcode: 171058".

The main content area is divided into several sections:

- Attendees:** Shows a video feed of the host, Meg Rose, with her name displayed below. The count is "0 / 1".
- Session Details:**
 - Session Name: BGA Webinar Series
 - Leader: Meg Rose
 - Date/Time: 02/26/2009 02:00 PM
- Audio Details:**
 - Primary Dial-In: 218-486-7200
 - Passcode: 171058
- Sharing (Meg Rose):** A list of sharing options on the right side:
 - Share your Desktop
 - Share a Region
 - Share an Application
 - Draw on a Whiteboard
 - Send Quick Invitation
 - Send Invitation via IM (copy)
 - Record Session
- Feedback:** A section with the text: "To request Feedback, select Answer Set from Feedback menu".
- Chat:** A chat window with "Public" and "Private" tabs and a text input field.

The bottom of the interface shows the Windows taskbar with the Start button and several open applications: Microsoft Office Word, Yahoo! Messenger, Webinars, Microsoft PowerPoint, iLinc - Window..., and iLinc | BGA We... The system clock shows 3:07 PM.



2009 Webinar Series

> Builds on format and growth of 2008 Series

- 30 minute sessions with high-impact, quick takeaways (***practical tips for marketing, sales, relationship-building and agency management***)
- Learn new tricks (sooner than later)
- Teach yourself new habits
- Focus on core competencies of wholesale brokerage
- E-Z Data “Virtual University” Concept
- Visit www.ezdata.com/bga for a 2009 Schedule!



BGA Reporting – Webinar Series

Feb 12: Using Production Reports Effectively (recorded session at www.ezdata.com/bga)

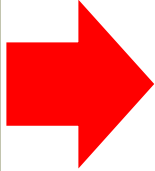
TODAY– Introductory Reporting Concepts

April 9 -- Advanced Reporting Concepts



Core and Explore

> Core



- Where to Find Basic Training and Help
 - Understanding the Fundamentals
 - Understanding the Purpose of Report Categories
- Working With What's Already There
- Deciding How Dynamic Reports Can Help You...
 - Track Underwriting Activity
 - Report Production by Carrier, LOB, Advisor, etc.
 - Provide Services
 - Facilitate Workflow Improvement

Core Resources for SmartOffice Reporting Fundamentals

SmartOffice Training and Help System



SmartOffice 6 Training Center

Here you will find resources for all of your training needs including:

-  Training & Fast Classes
-  Live Web-based Training
-  User Guides
-  On-Site Training

Please be aware that you can access the SmartOffice Help System, Training Center, Support Center, and User Guides by clicking the Hyperlinks menu.



[Home](#) | [Settings](#) | [Logout](#) | [Help/Training](#)

[SmartOffice Help System](#)
[Training](#)
[Support](#)
[User Guides](#)
[User Suggestions](#)
[About](#)

New to SmartOffice?

Please visit our [Getting Started with SmartOffice](#) page. Here you will find everything you need to get started including information on Tra contact data and more. In addition, watch the Getting Started Class and download the Getting Started User Guide to familiarize yourself

Basic Reporting Concepts

- > Reporting without Reports
- > Submitted Business by Case Manager (YTD)
- > Detailed Search is like a Reporting Wizard
- > Customizing the Layout
- > Filter on the Fly
- > Create a Dynamic Report



Takeaways from Today's Session

1. Become Familiar with the List Tools
 - Customize Layout
 - Column Sorting
 - Filter on Fly
 - Grouping (sorting) Options + Custom Groups
 - Totaling and Sub-totaling
2. You Don't Always Need to Create a Dynamic Report
3. When its Time to Make a Dynamic Report You'll be a Pro!

Plan to Attend the BGA CPC 2009!

- > September 13-15, 2009
- > St. Louis, MO
- > Exceptional learning and networking opportunities
- > BGAs, Carrier and Vendor Partners
- > User Driven - Input from BGA Advisory Council on meeting content
- > Take Me Out to the Ball Game...



More INFO at www.ezdata.com/bga

Next BGA Webinar April 9th

Advanced Reporting Concepts in SmartOffice for the BGA

4.9.09 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?

E-mail: meg.rose@ezdata.com

Direct phone: 404-486-9866

*Thank you for your time
and your business.*