

SmartOffice 2009 BGA Webinar

SmartView Case Status (SVCS)

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

Agenda

AGENDA		
October 8 th , 2009	Topic	Approx. Time
	Welcome and Introduction SmartView Case Status Stacey Gabaldon Product Manager	20 minutes
	Q&A Session <i>BGA Participants</i>	10 minutes

Agenda

AGENDA	
August 27, 2009	Topic
	Welcome and Introduction Meg Rose, FLMI, ACS Business Relationship Manager E-Z Data
	Pre BGA Client Partner Conference Wish List Review Sherri Isaacson Product Manager E-Z Data

File View Help

Audio

Audio Mode: Use Telephone Use Mic & Speakers

MUTED

Audio Setup

Talking: Phone Caller

Questions

Questions Log

Q: chat chat chat...

Q: Type your questions here...

Send

BGA Practice Webinar - On Aug. 26th
Webinar ID: 458-104-290

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PRACTICE MANAGEMENT | AGENCY MANAGEMENT | CLIENT RELATIONSHIP MANAGEMENT



E-Z Data Confidential



Talking: Phone Caller

79%



What is SmartView Case Status?

A way for advisors to obtain real-time status for pending cases in a simplified view

**Presented by
Stacey Gabaldon**

Why SmartView Case Status? (SVCS)

- 1. Easy to use**
- 2. Offers real time status**
- 3. Ability to e-mail case manager with one-click**
- 4. Provide some advisors with SVCS and some with SmartView for Advisor(SVA)**

How do I set up SmartView for Advisor Accounts?

Advisor List

Status



Advisor | Pending Cases | Policies | Group Policies | Opportunities | Activity Log

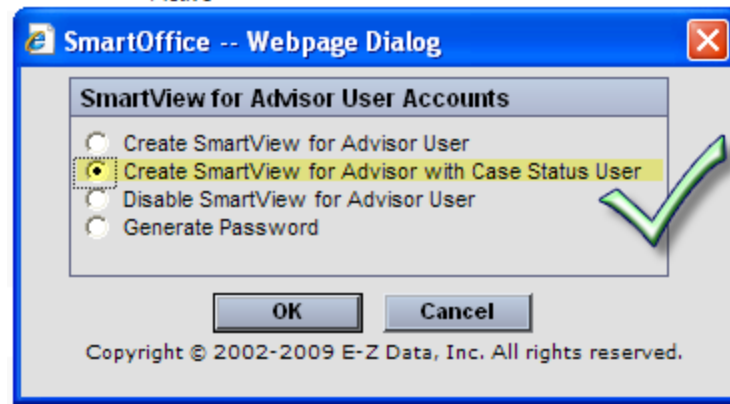
List | Personal | Add'l Detail (N) | Key Relations | License/E & O (X) | Cont./Appt. | Production (Z) | Letters/Documents | Request/Requirement

<input type="checkbox"/>	Advisor	Type	Status	All Addresses
<input type="checkbox"/>	Adamon, Tony	Advisor	Candidate	Residence 9762 Jupiter Forest Dr. Brentwood, TN
<input type="checkbox"/>	Adams, Robert	Advisor	Active	Residence 310 New Road Long Beach, CA 90745 Business 3210 S. Main Street Long Beach, CA 90746
<input type="checkbox"/>	Alexander, Todd	Advisor	Active	
<input type="checkbox"/>	Anderson, Philip	Advisor	Active	Business 773 W. Colorado Blvd Los Angeles, CA 90008 Residence 1234 Lime St. Pasadena, MD 21122
<input type="checkbox"/>	Andl, Denise	Advisor	Active	Business 600 Madison Ave. New York, NY 10022
<input type="checkbox"/>	Andrews, Kevin	Agent	Terminated	Business 773 W. Colorado Blvd

Drag an icon onto the toolbar to add it your favorites

- New 'Advisor' record Ctrl+Insert
- New (Comprehensive) 'Advisor' record Alt+=
- Search F6
- Print List
- Delete 'Advisor' record Ctrl+Del
- Add to Set
- View SmartPad Notes F7
- New SmartPad Note Shift+F7
- Add 'Advisor' Alert
- Broker Dealer
- Assign Contacts to the Current Advisor
- Advisor Hierarchy
- Marketing Options
- Contract Hierarchy
- Case Status
- SmartView for Advisor User Accounts

Ability to choose which View you want to provide your advisors



SmartView for Advisor
SmartView Case Status

SmartView Case Status Account Settings

User Account Settings - Christian Able



Office	User Groups	User Accounts
List Detail (P) User Rights Permissions User Preferences Leads Profile/Subscriptions >>		
User's General Information		User Type
User Name: ChristianAble		User Status: Temporary Password
Full Name: Christian Able		User Type: AdvisorVu User
Contact Record for this User: Christian Able		<input checked="" type="checkbox"/> SmartView for Case Status
E-mail Address: able1@msn.com		
Default User Group: All Users in Office <i>(This will be the default user group selected for Custom Fields)</i>		SmartOffice Access Hours
Responsible for Print Queue: <input type="checkbox"/> <i>(Click here if this user is responsible for printing jobs in the SmartOffice Printer Queue)</i>		This User is allowed to use SmartOffice between: From: [] To: [] Time Zone: No Time Zone has been set yet
Send Performance Feedback to E-Z Data: <input type="checkbox"/>		Calendar Access Options
		<i>'Restrict Activity Creation to Self Only' will override the 'Default Activity Participants' option selected.</i>
		<input type="radio"/> Restrict Activity Creation to Self <input type="radio"/> Create Calendar Activities for all

Pending Case List from SmartOffice

Pending Case List - Stacey Gabaldon

Policy Type: All Policy Stage: Underwriting All Role: []

Advisor: Pending Cases Policies Group Policies Investment Accounts Investment Positions Opportunities Activity Log

List | Detail (P) | Payments | Delivery (G) | Requests | Riders/Reinsurance | Activity/Mail (Z) | Letters/Documents | Policy Transactions (X) | PC

<input type="checkbox"/>	Carrier Name	Product Name	Policy Type	Policy #	Created On	Status	Advisor
Ackerman, Joseph M. Contact Name							
<input type="checkbox"/>	<None>		Life	SVCS	04/22/2009	Informal Application	Gabaldon, Stacey
Subtotal: 1 Ackerman, Joseph M.							
Ackerman, Kathleen M. Contact Name							
<input type="checkbox"/>	ABC Life	American Level 20	Life	multi two svcs	04/22/2009	Submitted	Gabaldon, Stacey
<input type="checkbox"/>	ABC Life	American Level 10	Life	YYPCM042209	04/22/2009	Submitted	Gabaldon, Stacey
<input type="checkbox"/>	ABC Life	American Level 10	Life	YYPCM042209-2	04/22/2009	Submitted	Gabaldon, Stacey
Subtotal: 3 Ackerman, Kathleen M.							
Adams, Janet Contact Name							
<input type="checkbox"/>	ABC Life	Assure Plus Variable	Life	advisor req. 2	07/25/2008	All UW Requirements In	Gabaldon, Stacey
<input type="checkbox"/>	ABC Life	Assure Plus Variable	Life	advisor req 3	07/25/2008	All UW Requirements In	Gabaldon, Stacey
<input type="checkbox"/>	ABC Life	Assure Plus Variable	Life	teste 4	07/25/2008	All UW	Gabaldon, Stacey

Records Shown: 11 Total Records: 31

Pending Case List from SVCS

[Case List](#) | [Change Password](#) | [Sign out](#)
[Previous Case](#) | [Next Case](#)

Stacey Gabaldon | Tuesday, October 06, 2009

Pending Cases

Pending Case List

Contact Name ^	Policy #	Carrier Name	Product Name	Benefit	Status	Status Date	Case Manager E-Mail
☒ Holding Type: DI (1 Pending Case)							
Zeus, Doo		ABC Life	IncomeProtectorPlus	1,000	Submitted	12/11/2008	sodem@ez-data.com
☒ Holding Type: Life (22 Pending Cases)							
Ackerman, Joseph M.	SVCS			0	Informal Application	04/22/2009	sodem@ez-data.com
Ackerman, Kathleen M.	YYPCM042209-2	ABC Life	American Level 10	100,000	Submitted	04/22/2009	sodem@ez-data.com
Ackerman, Kathleen M.	YYPCM042209	ABC Life	American Level 10		Submitted	04/22/2009	sodem@ez-data.com
Ackerman, Kathleen M.	multi two svcs	ABC Life	American Level 20		Submitted	04/22/2009	sodem@ez-data.com
Adams, Janet	teste 4	ABC Life	Assure Plus Variable	500,000	All UW Requirements In	10/23/2008	sodem@ez-data.com
Adams, Janet	test variable again	ABC Life	Assure Plus Variable	500,000	Approved	12/02/2008	sodem@ez-data.com
Adams, Janet	testing VUL 2	ABC Life	Assure Plus Variable		All UW Requirements In	10/23/2008	sodem@ez-data.com

SVCS – Case Detail

[Case List](#) | [Change Password](#) | [Sign out](#)

[Previous Case](#) | [Next Case](#)

Christian Able | Friday, June 05, 2009

Case Status - Brewer, Jason

Case Status			
Policy #	635241U	Date Entered	03/28/2005
Carrier	ABC Life	Case Status	Submitted
Product Name	Universal Coverage	Benefit	350,000
Proposed Modal Premium	250.00	Issued Modal Premium	
Proposed Premium Mode	Monthly	Issued Premium Mode	
Primary Advisor	Able, Christian	Case Manager	Wendy Truman
Contact	Brewer, Jason	Case Manager E-mail	sodemo@ez-data.com
Owner	Brewer, Jason	Case Type	Life

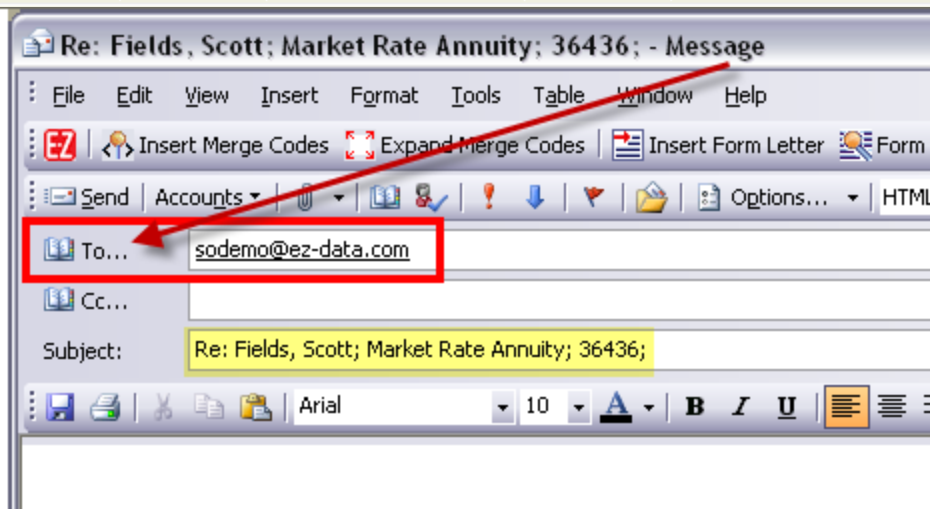
Insured			
Contact Name	Proposed Underwriting Class	Issued Underwriting Class	
Brewer, Jason	Standard Non-Smoker		

Requirements					
Requirements	Requirement Status	Required Of	Status Date	Completed	Remarks
[-] Contact Name: Brewer, Jason (3 Requirements)					
Blood Profile	Outstanding	GA	06/17/2009		
HOS	Outstanding	GA	06/05/2009		
Paramedical Exam	Outstanding	GA	06/08/2009		

Quick Communication

Pending Cases

Pending Case List							
Contact Name	Policy #	Carrier Name	Product Name	Benefit	Status	Status Date	Case Manager E-Mail
Holding Type: Annuity (2 Pending Cases)							
Fields, Scott	36436	ABC Life	Market Rate Annuity		Submitted	03/23/2009	sodemo@ez-data.com
Sanders, Dana		Genworth Life And Annuity Insurance Company	TimeSelect MVA		Submitted	04/15/2009	sodemo@ez-data.com
Holding Type: DI (1 Pending Case)							
Sanders, Dana		ABC Life	IncomeProtectorPlus	1,000,000	Submitted	01/17/2008	sodemo@ez-data.com
Holding Type: Life (8 Pending Cases)							



Now Lets See SVCS!

SmartOffice >>>

"Takeaways"

- 1. SmartView Advisors– two choices**
 - **SVA as it is today**
 - **SmartView Case Status**
- 2. Firm can have both types of SVA accounts running at one time**
- 3. SVCS – easier view into pending cases, do not need to learn SmartOffice**
- 4. Advisor can e-mail case manager**
- 5. To buy ~ Call John Pattison , 626-585-3505 ext. 7234**

Questions?

*Thank you for your time and
your business.*