

SmartLink for WinFlex Web

Automate and Track the Illustration Process

Running illustrations is part of your business. But with multiple points of access and manual entry of information, the process can be challenging and time consuming — especially when you are working with multiple carriers and selling multiple products.

SmartLink for WinFlex Web, an add-on module to SmartOffice®, automates the illustration process by providing access to multiple carriers and products through the power of WinFlex Web. The integration of these two powerful applications enables users to launch WinFlex Web from within SmartOffice, making it easy to leverage agent and client data and eliminate the hassle of redundant data entry. With the click of a button, client data is transferred and WinFlex Web is automatically launched, minimizing human error, and reducing the time and cost associated with running illustrations.

Better your business with online tracking tools

Launching WinFlex Web from within SmartOffice automatically creates a SmartOffice proposal tracking record. Users can save WinFlex Web illustration PDF files within SmartOffice, providing a complete record of the illustrations sent to clients. Agency marketing managers can easily create reports on what illustrations have been run and for whom, and identify which illustrations have resulted in applications. The proposal tracking tool can also be used to create pending cases in SmartOffice at the time applications are received. WinFlex Web provides more effective compliance

controls, marketing management and reporting, and efficient new business workflows to speed application processing — all to help better your business.

With a click of a button, the illustration process begins, with your client's demographic data being sent to WinFlex Web along with that of the primary advisor.

DATASHEET

- Eliminate data redundancy and minimize human error
- Reduce the time and cost associated with running illustrations
- Easily track and report on agent proposals
- Maintain compliance with auditable records

Joseph M. Ackerman (Joe) (Spouse: Katie)

Contact Household Opportunities Pending Cases Policies Investment Accounts >>

List | Personal | Add Personal | Key Relations | Benefits | Asset Allocation | Performance | Letters/Documents | Custom |

Personal Information		Phone Numbers	
Last Name: Ackerman	Suffix: [v]	Type: [v] Full Phone: [v] Remarks: [v]	
First Name: Joseph	Middle: M.	Residence: (626) 799-2951	
Greeting: Joe	Title: Mr.	Mobile: (213) 577-0337	
Type: Client	Sub-Type: A	Business: (310) 309-0948 # 152	
Source: Referral			
Sub-Source: [v]			
Referred By: Randall Halverson			
Birth Date: 02/27/1959	Age: 59		
Marital Status: Married	Gender: Male		
Review Date: 08/27/2009	# of Child: 2		
Primary Advisor: Philip Anderson	SS #: xxx-xx-5750		

Addresses	
Type: [v] Complete Address: [v] Map: [v]	
Residence: 488 S. Oakland Avenue Pasadena, CA 91101	
Business: 144 Wilshire Blvd., Suite 250 Los Angeles, CA 90007	

E-mail/Web Addresses	
Type: [v] Address: [v]	
E-mail: jackerman@bobbis.com	

Business Information	
Company: Joseph M. Ackerman, M.D., Inc.	
Occupation: Medical	
Job Title: Chief Of Staff	

Family Information	
Spouse: Kathleen M. Ackerman (Katie) 01/03/1958 (51)	Business/Professional, Hibbell
Son: Kenneth 04/15/1990 (18)	
Daughter: Marianne 12/12/1985 (23)	

© 2000-2009 E-Z Data, Inc. All rights reserved.

SmartLink for WinFlex Web provides these valuable features:

- **Automated Illustration Processes** transfer agent and client data from your SmartOffice database to quickly and easily create illustrations in WinFlex Web.
- **Multiple Carrier Illustrations** available from one location eliminate the need to track down illustrations on the web, saving time and speeding the illustration process.
- **Online Proposal Tracking** makes it easy to track illustrations and maintain a complete record of every client communication and its relative success.
- **Automatic Log-In To SmartLink For Winflex Web** makes the integration with SmartOffice transparent to the user and streamlines the illustration process.
- **User-Friendly Integration** eliminates the need for additional training.
- **Two-Way Integration** allows for each illustration and its associated

data to be transferred between WinFlex Web and SmartOffice in real time.

Illustrations can be saved directly to SmartOffice from WinFlex Web. A corresponding proposal and illustration(s) are created, and the illustration document is attached.

Take the next step toward superior service, greater growth, & better business:

- SmartOffice® Professional Edition for Insurance Agents
- SmartOffice® Premier Edition for Financial Advisors
- SmartOffice® Premier Edition for Brokerage General Agencies

To learn more about the SmartOffice solution designed for your business,

call 800-777-9188 or go to www.ezdata.com.

Joseph M. Ackerman (Joe) (Spouse: Katie)

SmartOffice -- Webpage Dialog

Proposal Tracking

Primary Insured: Joseph Ackerman
Primary Advisor: Anderson, Philip
Opportunity: [Blank]
Status: Sent to Insured
State: CA
Follow-up: 04/27/2009 Gender: Male
Birth Date: 02/27/1950 Age: 59
Tobacco: Never Used
User: Phillip Anderson
Created On: 04/27/2009 Phillip Anderson
Modified On: 04/27/2009 Phillip Anderson

Illustration Information

Carrier Name	Product Name	Basic Face	Premium	Open
<input type="checkbox"/> Transamerica Life Insurance Company	Trendsetter Super 10	100,000	614.00	<input type="checkbox"/>

Remarks

OK Cancel

© 2000-2009 E-Z Data, Inc. All rights reserved.