SMARTLINK for
SureLC

Bring producer licensing/contract data into SmartOffice with no manual data entry

Agencies that use Ebix's SmartOffice® CRM solution can track and manage a variety of critical data about their producers, from demographic information to licenses and contracts. Over time, however, entering and updating all that information can add up to hours of manual data entry—time that your staff could be spending on more productive tasks.

If you're looking for a way to radically streamline producer on-boarding and maintenance, SmartOffice offers a unique alternative: SmartLink for SureLC.

Leveraging a Proven Solution

SmartLink for SureLC harnesses the power of SuranceBay's industry-leading SureLC contracting automation system to help SmartOffice users speed up the process of entering and updating producer data. It starts with single sign-on (SSO) access to SureLC from SmartOffice. You can go straight to an existing agent's SureLC record from SmartOffice or create a new record, all without having to sign in to SureLC separately.

Once you're in SureLC, you can take advantage of that system's features to retrieve an agent's state licenses from the National Insurance Producer Registry (NIPR), review existing contracting and commission hierarchy information, ensure that the agent has filled out and signed all appropriate forms, and submit the appointment paperwork electronically to the carrier.
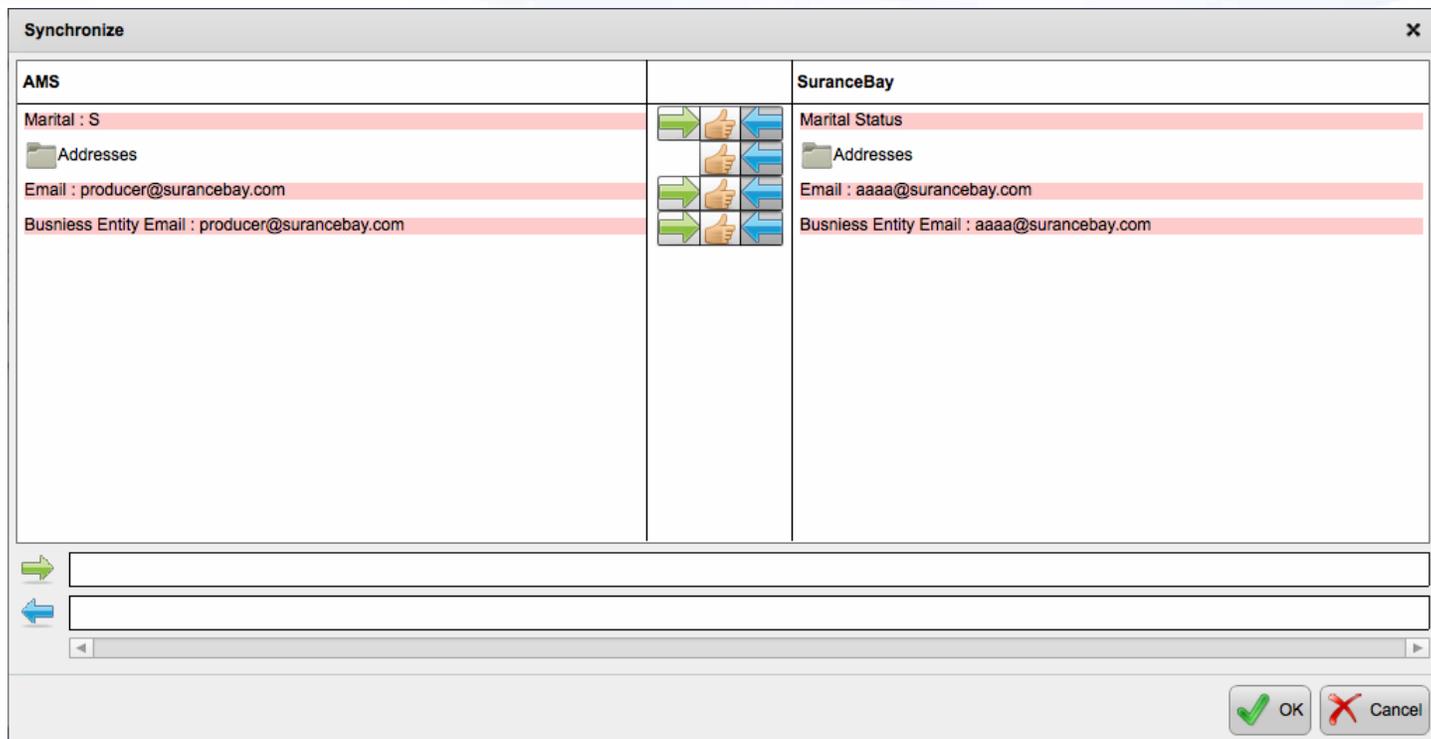
Two-Way Data Synchronization

The prime benefit of this solution comes into play after SureLC has retrieved all relevant information about a producer: With a few simple clicks, you can move that data into SmartOffice.

Key Benefits

- Synchronize licensing, contract and other producer data between SmartOffice and SureLC.
- Get PDB reports from NIPR to reduce data entry and the need to collect license copies.
- Make on-boarding of producers quick and easy.
- Save staff time and reduce errors and duplication.
- Access SureLC directly from SmartOffice, with no separate sign-in required.
- Create a paperless workflow to boost speed and efficiency.

SmartOffice® **Partnerships**

SmartLink for SureLC features a two-way sync capability that sets this solution apart from the one-way sync offered by competing CRM systems. This exclusive feature lets you compare the data in both systems, identify any missing data or conflicts in either system, and then decide which fields to sync from SureLC to SmartOffice and vice versa.

The two-way sync feature in SmartLink for SureLC lets you compare the producer data that exists in each system and sync in either direction on a field-by-field basis.

Intuitive buttons help you sync data quickly and easily. Producer addresses, phone numbers, licenses, contracts—all of this data and more can be transferred to and from SmartOffice in a fraction of the time it normally takes to enter the data manually, and with none of the duplication and errors that can slip in when staff perform data entry.

You also gain the benefits of an entirely paperless workflow, improving speed and efficiency even further.

Two Powerful Systems, One Clear Solution

With its ability to leverage SureLC's producer contracting capabilities, SmartLink for SureLC presents SmartOffice users with a compelling answer to the challenge of building a highly effective, integrated licensing/contracting solution.

To get started, contact SuranceBay today at 877-264-6888 and let them know you're ready to integrate SureLC with SmartOffice.