

BookSmart®

Tame the data beast.

Moving, manipulating or analyzing book rolls can present tremendous new business opportunities. But the execution can be crippling. Thorough book analysis requires a review of all the policies and understanding massive amounts of data. As a result, only a small number of policies are typically assessed. Enormous risk is often determined by disproportionately small amounts of information.

And then, of course, there are the mountains of data entry. Until now...

Agencyport's BookSmart® is a one-of-a-kind proven solution for migrating entire Books of Business—both personal and commercial lines. Whether you're acquiring a book from an agent, processing one purchased from another carrier, migrating policies from one policy administration system to another, or analyzing your existing books, BookSmart offers a flexible, easy-to-use solution to streamline and simplify the process—and give you a complete understanding of the risks inside.

Efficiency redefined.

BookSmart automatically prepares large data sets by validating and normalizing bulk policy records and applying company-specific underwriting rules. It also provides powerful reporting for instant analysis of which risks are desirable, and integrates quickly and easily with rating, point of sale and policy systems to move policy data through your specific workflow, without all of the re-keying along the way.

Smarter risk.

BookSmart lets users quickly and easily evaluate, edit and report on policy data. Its reporting capability also improves the overall assessment of a book's quality, helping companies better qualify the risk of a book of business. Smart.

KEY FEATURES:

Data Encryption At Rest

Sensitive Data Masking

Detailed Audit Trail

Personal & Commercial Lines

QuickFix

Now with Toolkit

Fastest version yet

Over 130 out-of-the-box reports

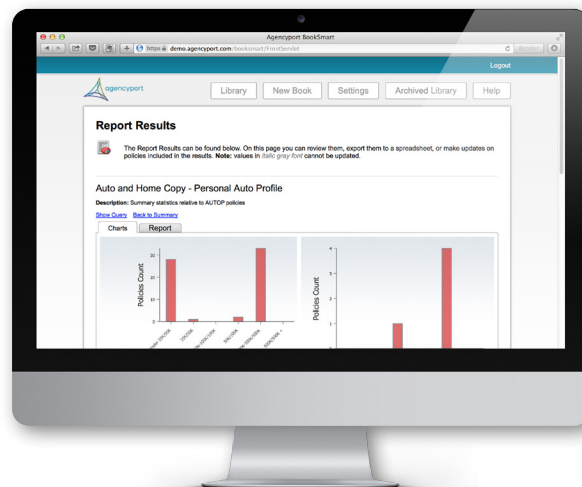
SAMPLE REPORTS:

Analytic Profile Reports

Data Validation Reports

Detailed Line of Business and Coverage Reports

Custom Reports



Many uses. One tool. How will you use BookSmart®?



Internal systems conversion.

Move data from one policy admin system to another quickly and efficiently. Data will automatically standardize to the new system's rules.



Rate and underwriter modeling.

Evaluate your own books quickly and easily. Let your underwriters and marketers get back to what they do best.



Inter-carrier book rolls.

Seamlessly transfer complete line of business data between another carrier and you. No more re-keying.



Automated book analysis.

Assess 100% of your agents' business, no matter the source or the format.

Painless updates.

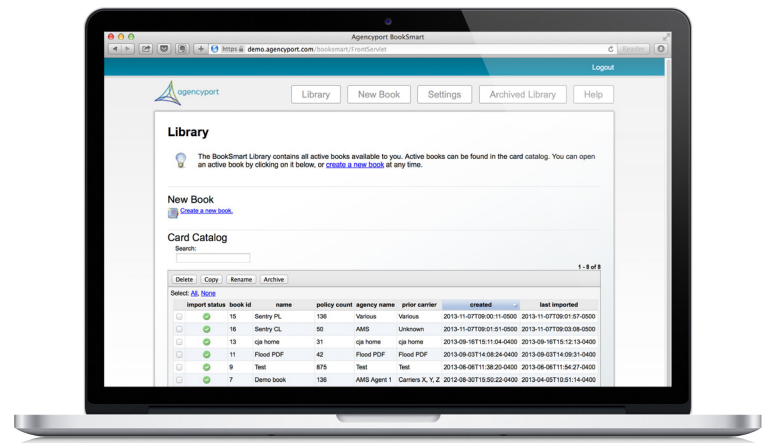
With BookSmart®, change is easy. Go ahead, make adjustments to policy data. Transform coverage codes or other values specific to a prior carrier to your coverages and values before moving policies over. Use VIN validation or address correction services to ensure the data you're entering is accurate. Bulk upload, simple or global update capabilities allow you to easily manipulate the data to meet your system's needs. Excel spreadsheet export also gives you the ability to push new data down to agents—all at once, not one policy at a time.

Easy on your business partners.

Why not start off on the right foot with a new business partner, or remind an existing one why you're the best carrier to do business with. BookSmart gives you the data you need without you having to take over partners' systems or ask for printed documentation.

Built on ACORD XML.

Like all Agencyport products, BookSmart is based on ACORD XML standards and designed to be integrated with your core processing systems from policy administration system to rating and rules, etc. Because all data is stored in ACORD XML, it can be sent by policy or in bulk to company systems or rating engines at any point within the book transfer process.



BOOKSMART®... BY THE NUMBERS:

Average cost to manually roll 2,500 policies from agent to carrier system: **\$4,500.00**

Average cost to roll same 2,500 policies from agent to carrier using BookSmart: **\$126.00**

Carrier rolling over 3,000 policies/month saves over **\$60,000** in first year.

Other BookSmart® highlights.

- Automatically or manually evaluates, reports, views and edits data on a policy or book basis.
- Over 130 different standard reports from which to choose.
- Users can sort, filter and drill down on virtually every detail of a policy.
- All reports can be exported to Excel for sharing with agents, underwriters and others.
- Integrates with rating and rules engines to automatically prepare a timely, accurate and complete response to your producers.
- Ability to compare premium and coverages from prior carriers.

Flexible import enables consumption of data in bulk or one policy at a time from varied sources including:

- AMS Book Roll Transit Server
- SIS WebLink
- Transformation Station
- CD or Zip file
- Commercial PDF Applications via Turnstile

Supports multiple data formats:

- AL3
- ACORD XML
- Flat Files and Excel Spreadsheets
- Custom formats based on other carrier requirements

Supports multiple lines of business:

- Personal Auto
- Commercial Auto
- Homeowners
- Dwelling Fire
- Personal Package
- Personal Umbrella
- Commercial Property
- General Liability
- Workers' Compensation
- Multi-Location Personal Homeowners

Agencyport® Software helps the nation's top P&C insurance companies engage simply and quickly with their distribution channels and technology partners—optimizing efficiency, improving the quality of underwriting and differentiating carriers from their competition. For more information contact sales@agencyport.com or 866.539.6623.



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