



eForms Wizard

AVYST eForms Wizard User Guide V1.0

ABSTRACT

This document contains instruction for end users of the AVYST eForms Wizard Solution.

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1 INTRODUCTION

Welcome to the AVYST Solution! AVYST is an agency sales and risk management software solution that was given birth by agency principles in the P&C Insurance Industry who were struggling with the ability to properly track referrals and efficiently provide prospective clients with insurance quotes that would allow them to effectively secure new business.

Our eForms Wizard automatically populates ACORD forms as well as carrier and agency/broker forms from the interview process. With eForms Wizard, information can be easily added one time to a form and it will pre-populate other forms within the application. From your library, you can select favorite forms and create packages of forms; then edit, save and share your applications and forms with others. Users can also work offline for convenience of people traveling to gain business. AVYST eForms Wizard allows you to work with an application package and submit it once you are back online. Finally, this program will have the ability for you to enter the information once and be able to submit it to multiple parties.

1.1 Notice of Confidentiality

THE PURPOSE OF THIS DOCUMENT IS TO PROVIDE END USERS WITH A REFERENCE GUIDE TO NAVIGATE THROUGH KEY FUNCTIONS OF THE APPLICATION. THE CONTENTS OF THIS DOCUMENT ARE CONSIDERED CONFIDENTIAL AND PROPRIETARY IN NATURE AND SHOULD NOT BE SHARED WITH ANYONE OUTSIDE OF OUR AVYST eFORMS WIZARD BETA TESTER OR CLIENT AGENCIES.

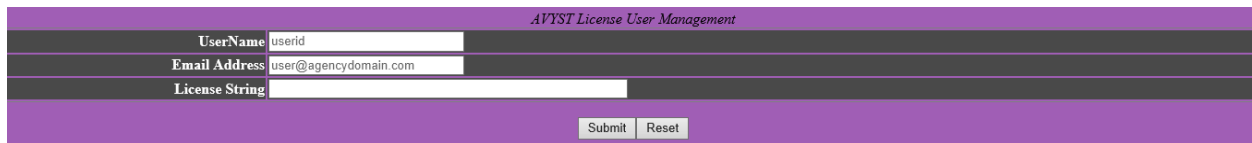
We have provided contact and support numbers in the Appendix of this guide for your reference.

2 DOWNLOADING AND INSTALLING

2.1 RECEIVING EMAIL WITH DOWNLOAD INFORMATION

At this point, you have contacted our company to sign up for our eForms Wizard. By now, you should have received an email containing your Username, Email Address, License Key and the URL link to download our product.

1. Click on the URL and it will take you to our AVYST License Manager.
2. Please enter your Username, Email Address and License String into our AVYST License User Management.

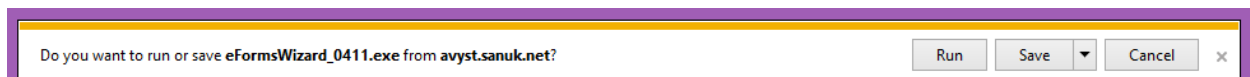


3. Your account information will pop up on the top of the screen and you will click on 'Download URL'

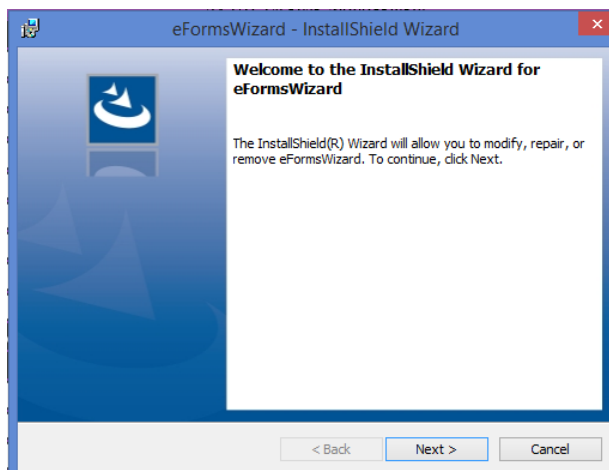
2.2 DOWNLOADING AND INSTALLING AVYST eFORMS WIZARD

This section describes how to download and install AVYST eForms wizard on your desktop, laptops, tablets.

1. Once you click on the link 'Download URL', a pop-up will appear, please click 'Run'.



2. You will then see a pop-up to install eForms Wizard, please follow the prompts to successfully install the product. Within these prompts, you will be asked to look over and accept our customer agreement.

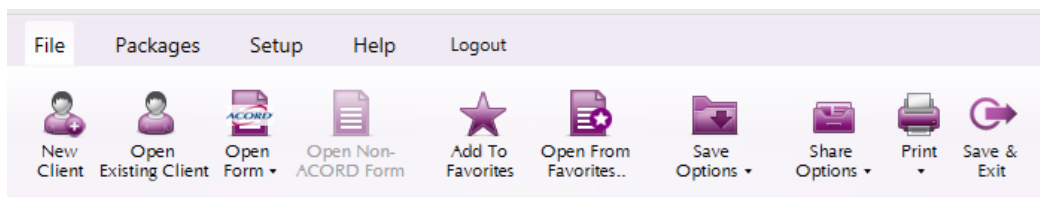


3. Once you click 'Finish' on the installation wizard it will launch our product, and you will be asked to enter your UserName and Email Address once more to login.
 - a. The License will prefill along with the Software Version, Install Date and Current Date.

3 WALKTHROUGH OF EFORMS WIZARD

3.1 FILE

This is the first tab you can see on your eForms Dashboard. If you look all the way to the right, you will see a thumbtack, this will allow you to pin the tabs open or else they will close after each selection.



3.1.1 New Client

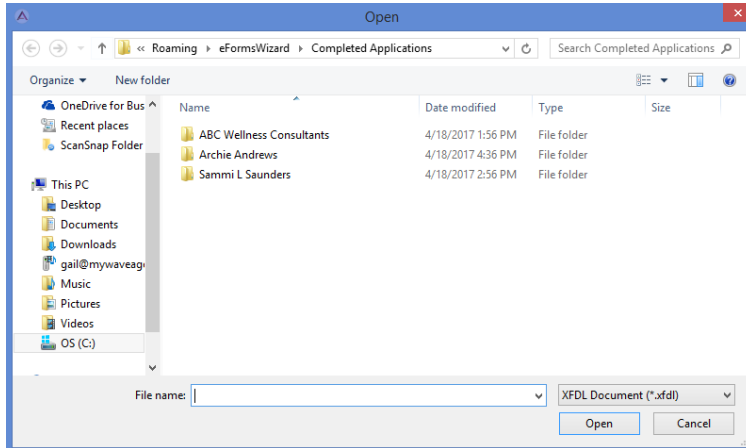
This selection will allow you to add new clients as they come into your workload.

1. You have two options when adding New Clients, you can either add a Personal Lines client or a Commercial Lines Client.
2. After that selection, you will begin to complete all the client details such as name and address.
3. Before you create the client, you have an option to 'Choose a Package', please head over to chapter __ to review how to set up packages and the benefit of doing so. If you would rather select your forms within the client, you can immediately select 'Create Client'
4. Once you click 'Create Client' it will take you to the client file, and at this point you will select 'Open Form' and choose the forms needed. This option will be better explained in chapter 3.1.3.

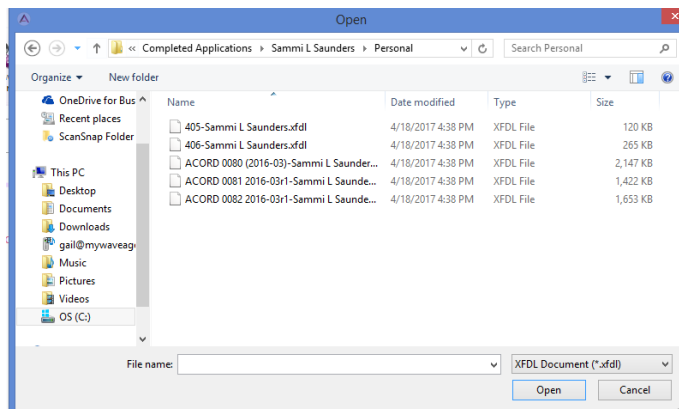
3.1.2 Open Existing Client

This selection will allow you to open a client that has already been created.

1. Once you select 'Open Existing Client', it will open a window with a list of your current clients. You will select the client you want to open and then select 'Open'.



2. At this point it will take you inside the client folder and you will select the folder that you want, there should only be one folder in here and it will either be a Personal or Commercial Lines folder.
 - a. If the client folder does not have any folders inside of it, this means that you did not add any forms to this client yet.
3. Once you select the Line of Business Folder that you want, you will see multiple files depending on how many forms you have added to the client. To open the client and all of its forms you will want to select all files in this folder and then select 'Open'



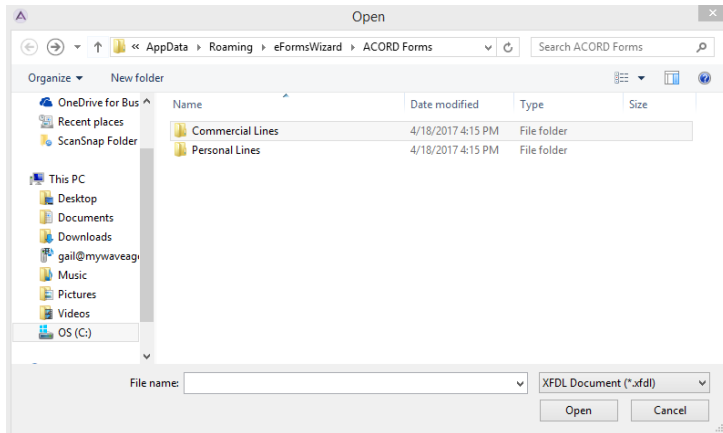
4. This will take you to the client and show you all of the forms selected. You can begin working on this client at this point.

3.1.3 Open Form

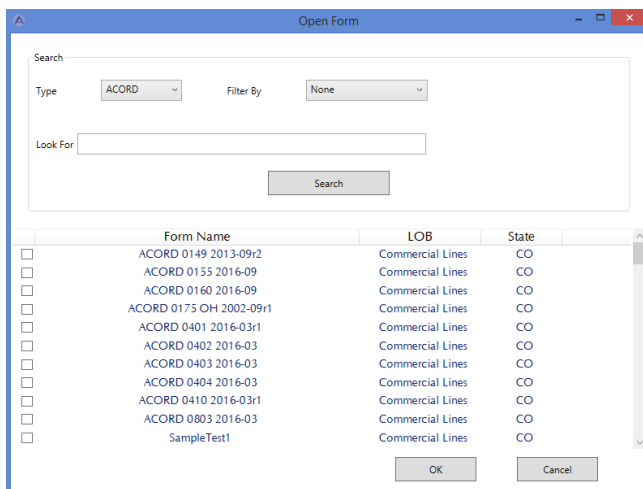
This selection will allow you to select forms that you would like to use for your clients.

1. When starting to look for forms to open, make sure that you are in the client that you want these forms added to.

2. You have two options when selecting 'Open Form', I will walk you through both at this time.
 - a. 'From Folder List' or 'From Pick List'
3. When you click 'Open Form' you will select 'From Folder List'. This will open another window with two folders listing Personal Lines or Commercial Lines. You will select the one that you are needing forms from. You will go through the folders eventually getting to the files that are the forms, you will make your selection, if you are wanting more than one you will hold down CTRL and select multiple and then click 'Open' and they will open to your clients file.



4. When you click 'Open Form' you will select 'From Pick List'. This will open a pop-up window listing the forms by name, LOB and state. You can also use a search option in this window. You will select all the forms that you are wanting and then click 'OK'. This will open them in the client file for you to begin your work.



3.1.4 Open Non-ACORD Form

This selection will allow you to select forms that you would like to use for your clients that are not ACORD forms, these can be carrier or broker specific forms.

This option is not yet available and this guide will be updated once it becomes available.

3.1.5 Add to Favorites and Open From Favorites

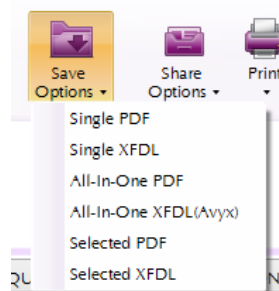
These two selections will allow you to add forms to your favorites folder and will give you easier access to your favorites folder by one click.

1. When you click on 'Add To Favorites', it will open up the form Pick List and you can make your selection to add one or multiple forms to your favorites. Once complete, click 'OK'. It will give you a prompt stating 'File is successfully add to favorite'
2. When you click on 'Open From Favorites', it will open up a window showing files/forms that you have added to your favorites. You can then open all the forms you need to the client that you are in.

3.1.6 Save Options

This selection will allow you to save your forms either via a PDF or XFDL file.

1. When you click on 'Save Options' it will present a dropdown with six selections. We will walk through what each of these mean.



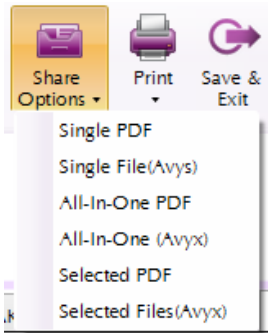
2. Let's talk about PDF vs XFDL:
 - a. PDF will save as an Adobe PDF Format, which means you can open it up as a document and review and share it outside of the program. This file cannot be imported back into our system so once it is saved as a PDF you cannot edit the PDF and have the edits imported to eForms Wizard.
 - b. XFDL file is a proprietary file specific to AVYST and this file can be saved and shared but to open it you must open it within the eForms Wizard.
3. Let's talk about 'Single', 'All-In-One' and 'Selected'
 - a. Saving a 'Single PDF' or a 'Single XFDL' will save the form that you are on at that moment.
 - b. Saving an 'All-In-One PDF' or an 'All-In-One XFDL' will save all of the forms that are under the client selected into one file.
 - c. Saving a 'Selected PDF' or a 'Selected XFDL' will save the selected forms, in order to select a form, you will have to check the box next to the form name in the forms tab.



3.1.7 Share Options

This selection will allow you to share your forms (PDF or XFDL files) via email.

1. When you click on 'Share Options' it will present a dropdown with six selections. We will walk through what each of these mean.



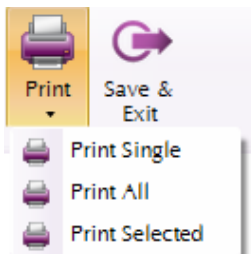
2. Let's talk about PDF vs XFDL:
 - a. PDF will save as an Adobe PDF Format, which means you can open it up as a document and review and share it outside of the program. This file cannot be imported back into our system so once it is saved as a PDF you cannot edit the PDF and have the edits imported to eForms Wizard.
 - b. XFDL file is a proprietary file specific to AVYST and this file can be saved and shared but to open it you must open it within the eForms Wizard.
3. Let's talk about 'Single', 'All-In-One' and 'Selected'
 - a. Sharing a 'Single PDF' or a 'Single XFDL' will save the form that you are on at that moment and attach it to an email.
 - b. Sharing an 'All-In-One PDF' or an 'All-In-One XFDL' will save all of the forms that are under the client selected into one file and attach it to an email.
 - c. Sharing a 'Selected PDF' or a 'Selected XFDL' will save the selected forms, in order to select a form, you will have to check the box next to the form name in the forms tab and it will attach it to an email.



3.1.8 Print

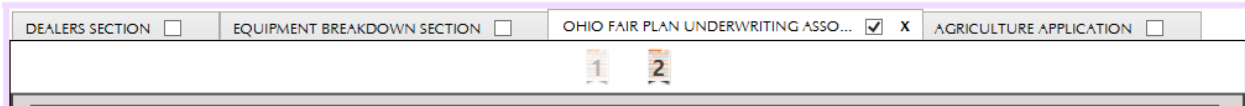
This selection will allow you to print out your forms.

1. When you click on 'Print' it will present a dropdown with three selections. We will walk through what each of these mean.



2. 'Single', 'All' or 'Selected'

- a. Printing 'Single' will print the form that you are on at that moment.
- b. Printing 'All' will print all of the forms that are under the client.
- c. Printing 'Selected' will print the selected forms, in order to select a form, you will have to check the box next to the form name in the forms tab.



3.1.9 Save & Exit

This selection will save all the work you have done up to that point and log you out of the eForms Wizard.

3.2 PACKAGES

This is the second tab you can see on your eForms Dashboard. This section will walk you through how to create and implement form packages.



3.2.1 New Package

This section will allow you to create packages of forms for easier access to a group of forms in future uses.

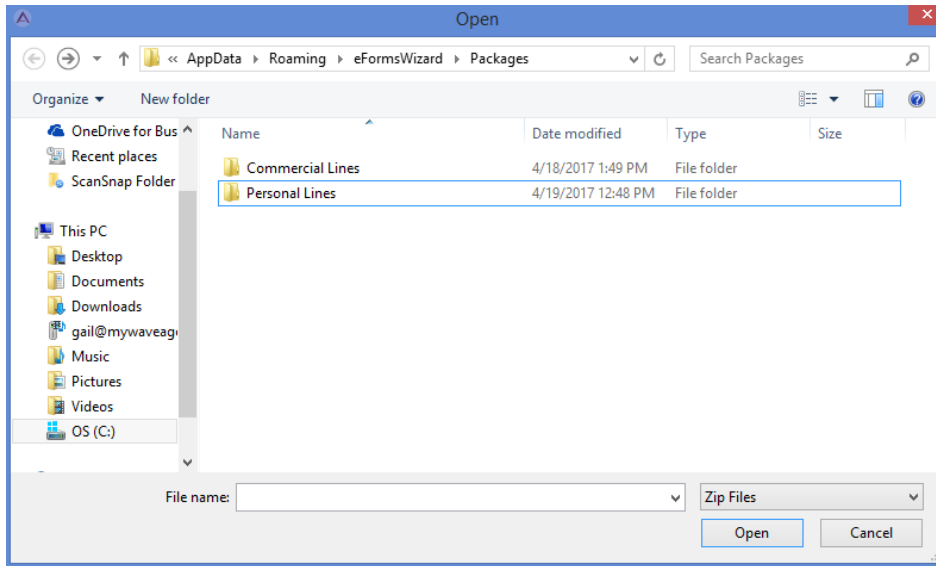
1. Once you click 'New Package' you will see a pop-up screen. You will input the Package Name and select the LOB Type.

2. Once you select 'Create' you will be taken to the Pick list where you will pick the forms that you would like in a package.

3.2.2 Open Package

This section will allow you to open and use the packages that you previously created or imported.

1. Once you click 'Open Package' it will open a window for you to select the LOB, once you open the LOB folder that you want you can see the packages that you have either created or imported.

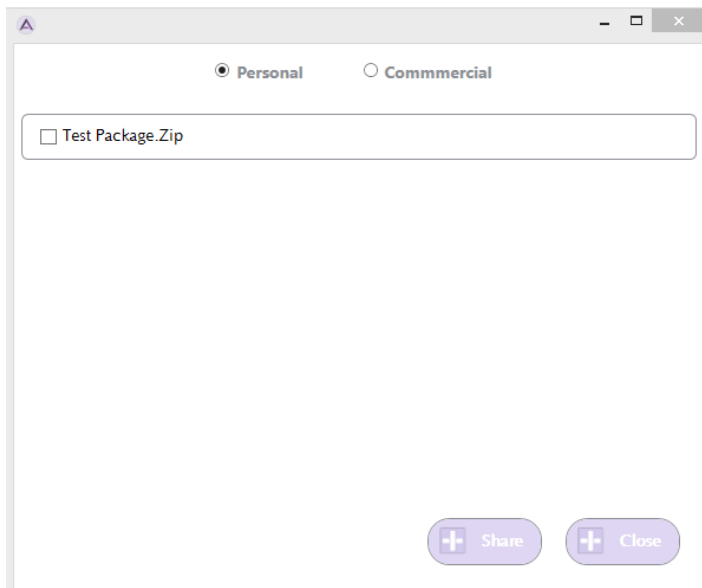


2. Once you open the package that you want, it will add the forms to the client that you are currently on.

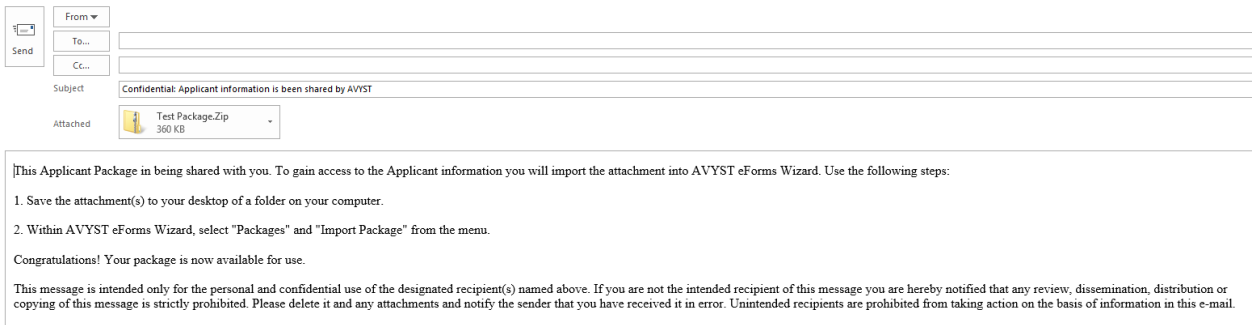
3.2.3 Share Package

This section will allow you to share the packages that you created via email to other users of eForms Wizard.

1. Once you click on 'Share Package' a pop-up window will open listing all of your current packages.



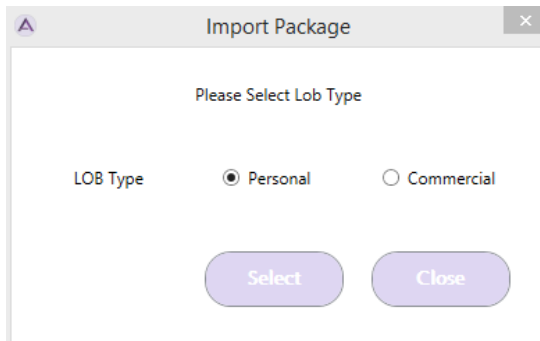
2. Select the package(s) that you would like to share and click 'Share', once you do this it will open a new email with the attachment and instructions to import the attachment to the other users eForms Wizard.



3.2.4 Import Package

This section will allow you to open packages that other users might have sent to you so you can have the form packages they created.

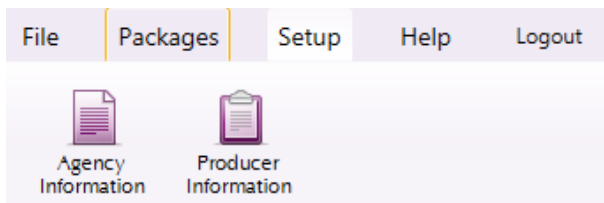
1. Once you select 'Import Packages' it will open a pop-up window to have you select what LOB type you would like to import the package under.



2. Once you select an LOB Type and select 'Select' then it will take you to another window, at that point you will have to find the folder that you saved the file in, and select it to open it up as a package in eForms Wizard.

3.3 SETUP

This is the third tab you can see on your eForms Dashboard. This section will walk you through adding information for your agency and producers.



3.3.1 Agency Information

This section will allow you to add your agency information for easy access and this will also prefill onto forms that require agency information. If you have more than one, you will need to select a default for the one that you want prefilled on the forms.

1. In this tab, you can click on 'Add Agency' and once you do this you will be able to complete your agencies basic information. Once complete, click 'Submit'. You can add multiple agencies as your desire.

The screenshot shows the 'Agency Information' form. At the top, there is a tab labeled 'Agency Information'. On the left, there is a button '+ Add Agency'. On the right, there are buttons for 'Set Default', 'Edit', and 'Delete'. The form fields are: Agency Name, Contact Name, Street Address, Address 2, Unit Number, City, State (dropdown menu), Zip Code, Country (dropdown menu), Main Phone, Fax, and Email. At the bottom right, there are 'SUBMIT' and 'Cancel' buttons.

2. You can also add a location. If your agency has more than one location then you can select 'Add Location' and add the other locations as needed.

The screenshot shows the 'Test Insurance Agency' form. On the left, there is a button '+ ADD LOCATION'. On the right, there is a preview window for 'Velociraptor Insurance Agency Main office' in Colorado, U.S.A. The preview window contains the following information: Velociraptor Insurance Agency Main office, 1234 Main St, Contact: Sam Smith, Tel: (003)555-4564, Fax: , Email address: sam@insagency.com, Code: CO, Sub Code: 80234, Agency Customer id: 456. The form fields are: Nick Name, Contact Name, Street Address, Address 2, Unit Number, City, State (dropdown menu), Zip Code, Country (dropdown menu), Main Phone, Fax, and Email. At the bottom left, there are 'SUBMIT' and 'Cancel' buttons.

3.3.2 Producer Information

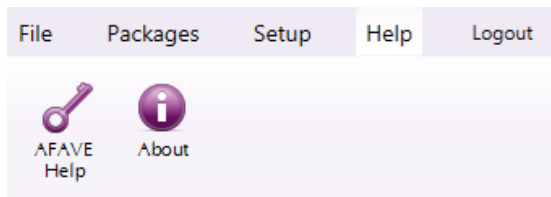
This section will allow you to add your producer information for easy access and this will also prefill onto forms that require producer information. If you have more than one, you will need to select a default for the one that you want prefilled on the forms.

1. In this tab, you can click on 'Add Producer' and once you do this you will be able to complete your producer's basic information. Once complete, click 'Submit'. You can add multiple producers as your desire.

Producer Information				
+ Add Producer	Producer Last Name *	<input type="text"/>	Agency *	
	Producer First Name *	<input type="text"/>		Select Agency ▼
	Producer Middle Initial	<input type="text"/>		<input type="text"/>
	National Producer Number	<input type="text"/>	Submit	
	State Producer Number (if Applicable)	<input type="text"/>	Cancel	
Producer Name	Agency Name	National Producer Number	State Specific	

3.4 HELP

This is the fourth tab you can see on your eForms Dashboard. This section will walk you through how to see updates or upgrades and how to contact our office for additional help.

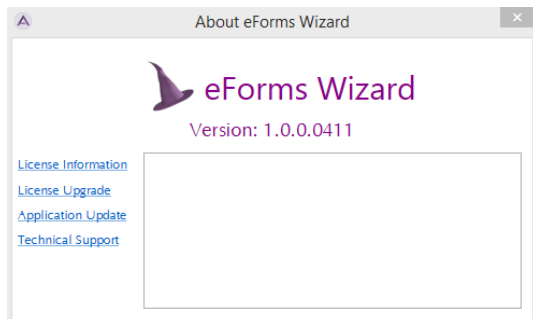


3.4.1 AFAVE Help

This option is not yet available and this guide will be updated once it becomes available.

3.4.2 About

This section will allow you to see more about eForms Wizard whether it be your license information or application information.



1. License Information will tell you about your license and when it expires.
2. License Upgrade will take you to our website if you would like to upgrade your package.
3. Application Update will let you know if your application has an update needed
4. Technical Support will give you additional contact information so you can get further help on any problems that you might be having.

3.5 LOGOUT

This is the fifth tab you can see on your eForms Dashboard. Once you click this tab it will immediately log you out.

4 SUPPORT

Need help? Here's how you can contact us.



Email: support@avyst.com

We will respond to all requests Monday – Friday, 8 am – 6 pm MTN

In your email, please include the following:

1. Tells us a little about what happened and what you expected.
2. Take a screen shot of the page that the issue appears and paste or attach it into an email.
3. Copy the URL and paste that into the email.
4. Please provide your name and contact information so that we can follow up with you.



Phone: 720.893.3005

Monday – Friday, 8 am – 6 pm MTN

Issue Reporting Steps:

1. It's best if you are at your computer when you call so we can set up screen sharing.
2. Be prepared to tell us a little about what happened and what you expected.
3. Have your agency name and your contact details in case we get disconnected.

Helpful Tip

TO GRAB A SCREEN SHOT

1. Navigate to the screen where your issue exists.
2. Find your Snipping Tool and select 'new'.
3. Drag the mouse to create a box around the screen in question.
4. Click on the copy button in the snipping tool.
5. Navigate to your email message and paste/right click and paste/Ctrl-v.

