

AVYST eForms Wizard Test Cases V1.1

ABSTRACT

This document contains sample scenarios for the Early Adopter Program of the AVYST eForms Wizard.

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1 Setup

1.1 AGENCY INFORMATION

1.1.1 Add an Agency

1.1.1.1 Add agency by selecting 'Setup' from the top left of the screen.

| File Packages Setup | Help |
|---------------------|------|
|---------------------|------|

1.1.1.2 Select 'Agency Information'



1.1.1.3 Complete all mandatory fields on Agency Information screen and select 'Submit'

| | Agency Information | _ |
|------------------|--------------------------|---|
| Add Agency | | |
| Agency Name * | | |
| Contact Name | | |
| Street Address * | | |
| Address 2 | | |
| Unit Number | SUBMIT | |
| City * | State * Select a State V | |
| Zip Code * | Country • U.S.A V | |
| Main Phone * | | |
| Fax | | |
| Email | | |

1.1.1.4 After selecting 'Submit' you will receive popup notification that agency was successfully created, click **'OK'**



1.1.1.5 Your 'Agency Information' will then display with option to 'Add Agency' or 'Add Location' in addition to your main office. Options will also display to 'Set Default', 'Edit' or 'Delete'

| Wave Financia | Partners 3025 S Parker Rd Suite 110 | Agency Information | Ý | · Carbodiana () Carbodia | × |
|----------------------------|---|--------------------|---|--------------------------|---|
| Wave Financial Partners | Wave Financial Partners Main offi Colorado , U.S.A Wave Financial Partners Main office 3025 S Parker Rd Suite 110 Contact: Tek: (3033/40-9283 Fax: Email address: State: CO Zip Code: 80014 Agency Customer id: | fice | | | |

1.2 PRODUCER INFORMATION

1.2.1 Add Producer Information

1.2.1.1 Add 'Producer Information' by selecting 'Setup' from the top left of the screen.



1.2.1.2 Select 'Producer Information'



1.2.1.3 Select **'+Add Producer'**, complete all mandatory fields and select **'Submit'**. Additional Producers can be added with the same process.

| | Producer Last Name * | Producer Information Agency * Select Agency | Submit |
|---------------|---------------------------------|---|--------|
| | Producer First Name * | National Producer Number | |
| | Producer Middle Initial | State Producer Number (If Applicable) | Cancel |
| Producer Name | Agency Name National Producer N | Number State Specific | |

2 PACKAGES

2.1 NEW PACKAGE

2.1.1 Add a new package

2.1.1.1 Add a new package by selecting **'Packages'** from the top left of the screen.



2.1.1.2 Select '+New Package'



- 2.1.1.3 A pop-up screen will appear to 'Please Enter New Package Name' and select 'LOB Type'
 - Type 'Advanced PL'
 - Select **'Personal'**
 - Select 'Create'

| Create Package | | |
|----------------|--------------------------|--|
| Please | e Enter New Package Name | |
| Package Name | Advanced PL | |
| LOB Type | Personal O Commercial | |
| | Create Cancel | |

- 2.1.1.4 A pop-up screen will appear to "Select Forms for Package'
 - Filter By:
 - o Type; i.e.: 'Personal'
 - Line of Business: i.e.: 'All'
 - o State: i.e.: 'All'

- Use the *Search By* field to search and select (check the box) the 6 following applications from 'Form Name' for the Advanced PL Package:
 - Homeowner Application
 - Colorado Personal Automobile Application
 - Personal Umbrella Application
 - Personal Inland Marine Application
 - Watercraft Application
 - Dwelling Fire Application
- Select 'Open'

| Select | Forms for Package | | | - 0 × |
|--|---------------------------------------|----------------------|--------------|----------------|
| V Line of Business All V State | | | State All | V |
| | Search By Form Name | | | |
| | enter seach term hei | re, i.e. auto | | |
| | Form Name | Form Num | Type of Form | Line of Busine |
| | Solid Fuel Questionnaire | 73 | Personal | Dwelling; Home |
| | Residence Based Business | 74 | Personal | Dwelling; Home |
| ✓ | Homeowner Application | 80 | Personal | Homeowners |
| ✓ | Personal Inland Marine Application | 81 | Personal | Inland Marine |
| ✓ | Watercraft Application | 82 | Personal | Watercraft |
| ✓ | Personal Umbrella Application | 83 | Personal | Umbrella |
| | Florida Personal Umbrella Application | 83 | Personal | Umbrella |
| ~ | Dwelling Fire Application | 84 | Personal | Dwelling |
| \checkmark | | | | |

2.1.1.5 After selecting 'Open' you will receive popup notification that package was successfully created, click '*OK*'.

| eForms Wizard | x |
|---------------------------------------|---|
| Package has been successfully created | |
| ОК | |

2.1.2 Open, Share or Import Package



2.1.2.1 'Open Package'

- A client must be selected to 'Open Package' under 'Packages'
- Double click on the Personal Lines folder
- Select the Advanced PL package just created, click open

2.1.2.2 'Share Package'

- Select the package you want to share and select +Share to email
- Steps automatically included in the email of how to import the package into another users AVYST eForms Wizard

| Send 0 | | | | |
|--------|--|--|--|--|
| | Subject | Confidential: Applicant information is been shared by AVIST | | |
| | Attached | Advanced Jpp (993 XS) | | |
| fo | This Applicant Package in being shared with you. To gain access to the Applicant information you will import the attachment into AVYST eForms Wizard. Use the following steps: 1. Save the attachment(s) to your desktop of a folder on your computer. | | | |
| | | | | |
| 2. | Within AVYSI | 'eForms Wizard, select "Packages" and "Import Package" from the menu. | | |
| Co | Congratulations! Your package is now available for use. | | | |
| yo | u are hereby no | tended only for the personal and confidential use of the designated recipient(s) named above. If you are not the included recipient of this message withing that any review, dissemination, distributions or copying of this message is strictly prohibited. Persee delete it and any attachments and notify the ave received it in error. Unintended recipients are prohibited from taking action on the basis of information in this e-mail. | | |

2.1.2.3 'Import Package'

• A pop-up screen will appear to Select LOB Type

| A Import Package | | × |
|------------------|-----------------------|------------|
| | Please Select Lob Typ | e |
| LOB Type | Personal | Commercial |
| | Select | Close |

3 PERSONAL LINES SCENARIOS

3.1 SCENARIO 1: HIGH NET WORTH PACKAGE

3.1.1 Add a new client

3.1.1.1 Add a new client/prospect by selecting *+New Client* from the top left area of the screen under 'File'.



- 3.1.1.2 This takes you to the 'New Client Info' screen where you will enter the basic information about your client/prospect.
 - Select 'Personal' for a personal lines applicant
 - Select 'Commercial for a commercial lines applicant

| Personal | Commercial |
|----------|------------|
| | |

3.1.1.3 Choose '*Personal'* and enter all mandatory fields on New Client Info screen:

| | return to client | | | | |
|---|--------------------|-------------------------|----------------|-------------------------|--------|
| | New Client | ▼ | | | |
| _ | | | Add New Client | | |
| | | Personal Commercial | | | |
| | | New Client Info | | Choose A Package | |
| | First Name * | John | | Advanced PL | ^ |
| | Middle Initials | R | | Advanced | |
| | Last Name * | Jones | | Advanced2 | |
| | Street Address 1 * | 198 W. Elm Street | | | Create |
| | Street Address 2 | | | Basic | |
| | Unit Number | | | Dwelling Fire Monoline | Cancel |
| | City * | Denver State * Colorado | V | Home, Auto Complex wit | |
| | Zip Code * | 80239 Country * U.S.A | V | Home, Auto, Marine & Uı | |
| | Phone * | (303)999-2563 | | Home, Auto, Umbrella | |
| | Fax | | | Home, Rental, Auto & Un | |
| | Email Address | JRJones69@gmail.com | | nome, Kental, Auto & On | ~ |

3.1.1.4 Choose the appropriate package if you have one and select 'Create'. For this client *select* 'Advanced' from Choose a Package; note that if you do not want to use an existing package you can choose not to pick a package and just *select* 'Create' and will then be able to choose appropriate ACORD forms.

- 3.1.1.5 All applications from your package will then be displayed with client information that was completed as well as your agency information pre-filled in each of the applications. Select each application individually to complete ACORD information on each application.
 - When more than 4 applications are included you can use the right and left arrow keys (< & >) on each side of the application display to display other selected applications.

| John R Jones | • | | John R Jones 198 W Elm Street Denver, CO 80239 Phone: (303)999-2563 E-mail: JRJones69@gmail.com |
|----------------------------|---|---|---|
| ÷ | - Matercraft Application - Personal Umbrella Ap | plication Dwelling Fire Application Colorado P | ersonal Automobile Application 🔲 🗴 ≻ |
| Recent Items | | 1 2 3 4 | |
| Dwelling Fire Application | | | DATE (MM/DD/YYY) |
| Colorado Personal Automo | ACORD COLORADO PERSONAL | AUTO APPLICATION | DATE (MM/DD/TTTT) |
| Personal Umbrella Applicat | AGENCY | APPLICANT'S NAME AND MAILING ADDRESS (Include county & ZIP+4) | TELEPHONE NUMBER |
| reisonal onibiena Applicat | Wave Financial Partners | John R Jones | (303)999-2563 |
| Watercraft Application | 3025 S Parker Rd Suite 110 | 198 W Elm Street | |
| Personal Inland Marine Apr | | | |
| | Aurora CO 80014 | Denver U.S.A CO 80239 | |
| Recent Clients | CONTACT | INDICATE IF MAILING ADDRESS IS GARAGING ADDRESS | NAIC CODE |
| John R Jones | NAME: PHONE (303)740-9283 | 1 | NAL CODE |
| John K Johes | (A/C, No, Ext): (303)740-9265 FAX (A/C, No): | PLAN POLICY #: | |
| | E-MAL ADDRESS: | ACCT #: | |
| | CODE: SUBCODE: | EFFECTIVE DATE EXPIRATION DATE DIRECT MAIL PC | π |
| | AGENCY CUSTOMER ID: | AGENCY MAIL PC TO APPL | UCY |
| | RESIDENCE CURRENT RESIDENCE IS OWNED | RENTED | |
| | VRS AT ADDR CURR PREV PREVIOUS STREET ADDRESS (If less than 3 years) | CITY | STATE ZIP + 4 |
| | | 1 | |
| | ADDITIONAL GARAGING ADDRESS(ES) | CITY COUNTY | STATE ZIP + 4 |
| | | | |

3.1.1.6 To remove an application from the selected package select the 'X' from that particular application.



3.1.1.7 To add an application from the selected package select 'Open Form' from the top left of the screen and a popup page will appear to select the additional forms by checking the boxes to the left of the form name and select 'Open'.



| Filter | | of Business All | V Str | ite All | v |
|--------|--|-----------------------|--------------------|---------|---------|
| | | | | | |
| | Search By | | | | |
| | | to app | | | |
| | | enter seach term here | e,i.e. auto | | |
| | Form Name | Type of Form | Line of Business | State | Edition |
| | California Personal Auto Application | Personal | Personal Auto | CA | 2015/12 |
| - | Colorado Personal Automobile Applica | Personal | Personal Auto | СО | 2015/12 |
| | Connecticut Personal Automobile App | Personal | Personal Auto | CT | 2015/12 |
| | District of Columbia Personal Auto App | Personal | Personal Auto | DC | 2015/12 |
| | Delaware Personal Auto Application Se | Personal | Personal Auto | DE | 2015/12 |
| | Florida Personal Automobile Applicatio | Personal | Personal Auto | FL | 2015/12 |
| | Georgia Personal Automobile Applicati | Personal | Personal Auto | GA | 2015/12 |
| | Hawaii Personal Automobile Applicatio | Personal | Personal Auto | HI | 2015/12 |
| | Towa Personal Auto Application | Personal | Personal Auto | TΔ | 2015/12 |

- 3.1.1.8 Use the paging buttons at the top or bottom of each application or enter the page number at the bottom of each application to move forward or back.
 - The selected page will be in bold on the top of each application where total number of pages is displayed.

| - Watercraft Application | Personal Umbrella Application | Dwelling Fire Application | Colorado Personal Automobile Application 🔲 🗴 > |
|--------------------------|-------------------------------|---------------------------|--|
| | 1 2 | 3 4 | |

- As you complete each field you can you your tabbing button to move to the next field and screen will automatically scroll down or you can use the scroll from the right side of the application.
- The selected page will be displayed at the bottom of each application next to 'Current Page'

| ESTIMATED TOTAL: \$ | PREMIUM DEPOSIT: \$ | POLICY FEE: \$ | TOTAL PER VEHICLE | s | \$ | s | s | |
|------------------------|------------------------|---|----------------------|-----------------|--------------------|-------------|---|-------|
| ACORD 90 CO (2015/12) | | Page 1 of 4 | 🔶 1981-20 | 015 ACORD CORPO | DRATION. All right | s reserved. | | |
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| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | 1 |
| | | | | | | | | |
| | | | | | | | | |
| | M M | Current Page 1 | N To | tal Page 4 | | | | |
| | | | | | | | | |

- 3.1.1.9 Information that is input and used in different selected package application(s) will automatically pre-fill. Complete auto application vehicle and driver information and when you access the umbrella application the information will already be pre-filled.
 - Likewise, when either of the applications is updated system will also automatically update the other line of business.

• If only 3 vehicles were added to the auto application initially and an additional auto was manually added to the umbrella application, vehicle 4 would pre-fill to the auto application.

Auto Application Manual Input:

| VE | HICLE | DESCRIPT | ION / USE | | | | TOTAL NUMBER OF VEHICLES IN HOU | SEHOLD: | | | | | |
|-----|--------|----------------|--|------------------------|---|---------|---------------------------------|-------------|------------|------|----------------------------|---------------|--------------|
| ИЕН | LOC | YEAR | MAKE | MODEL | BODY TYPE | | VIN REG STATE | | | : | DATE | DATE PURCH | NEW/ USED |
| 1 | | 2007 | Ford | Mustang | | 1FA | FP12WA4E123456 | C | 0 | | | | |
| 2 | | 2016 | Ford | F150 | | 2FP | XZ65U4A6578946 | C | 0 | | | | |
| 3 | | 2011 | Chevy | Malibu | | 4EP | U356KDPE125879 | C | 0 | | | | |
| _ | | | | | | | | | | | | | |
|), | | Wa | tercraft Application | Personal Ur | nbrella Application 🔲 | Dwellin | ng Fire Application 🔲 | Colorado Pe | ersonal Au | utom | obile Ap | plication | X |
| | | | | | 1 | 3 | 4 | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | ENCY CUSTOMER ID: | | | | | | |
| F | RESIDE | NT & DRIV | ER INFORMATION (List all res | idents & dependents (I | censed or not) and regular ope | AGE | | | | | | | |
| F | | INT & DRIV | ONAL AUTO APPLICATIO | | censed or not) and regular ope NAME (AS IT APPEARS ON LICENSE) | AGE | ENCY CUSTOMER ID: | | | MAR | REL TO | DATE OF BIRTH | |
| F | LORA | DO PERS | ER INFORMATION [List all res FIRST NAME | | icensed or not) and regular ope | AGE | INCY CUSTOMER ID: | | SEX | STAT | REL TO APPLIC | DATE OF BIRTH | |
| F | J | lohn | ONAL AUTO APPLICATIO | | censed or not) and regular ope NAME (AS IT APPEARS ON LICENSE) | AGE | INCY CUSTOMER ID: | | M | M | APPLIC | 06/04/196 | 6 |
| F | J | DO PERS | ONAL AUTO APPLICATIO | | censed or not) and regular ope NAME (AS IT APPEARS ON LICENSE) | AGE | INCY CUSTOMER ID: | | | STAT | REL TO APPLIC I S | | 6 |
| F | Jo | lohn | ONAL AUTO APPLICATIO | | censed or not) and regular ope NAME (AS IT APPEARS ON LICENSE) | AGE | INCY CUSTOMER ID: | | M | M | APPLIC | 06/04/196 | 6 |
| F | Jo | lohn Brenda | ONAL AUTO APPLICATIO | R | censed or not) and regular ope NAME (AS IT APPEARS ON LICENSE) | AGE | INCY CUSTOMER ID: | | M | M | APPLIC I S | 06/04/196 | 6 |
| F | Jo | lohn Brenda | ONAL AUTO APPLICATIO | R | censed or not) and regular ope NAME (AS IT APPEARS ON LICENSE) | AGE | INCY CUSTOMER ID: | | M | M | APPLIC I S | 06/04/196 | 6 |

Umbrella Application Pre-fill from auto application input:

| ← I | _ | | AND RECREATIONAL WNED, LEASED OR FURNISI | | AND M | OTORCYCLES, SNOWMO | BLES, DUNE BUGGIES, | MINIBIKES, etc. | | | | | | | | | |
|----------------------------|---|----------|---|-----------|--------|--------------------|---------------------|-----------------|------|------------------|---|---------|--|-----------|--------|----------------|--------------|
| 11 | | YEAR | | MAKE | | | | MC | DDEL | | Т | | | BODY T | YPE | | |
| Recent Items | | 2007 | Ford | | | | Mustang | | | | | | | | | | |
| Dwelling Fire Application | | 2016 | Ford | | | | F150 | | | | | | | | | | |
| Colorado Personal Automo | | 2011 | Chevy | | | | Malibu | | | | Ŧ | | | | | | |
| Personal Umbrella Applicat | | | | | | | | | | | 1 | | | | | | _ |
| Watercraft Application | | | | | | | | | | | | | | | | | |
| Personal Inland Marine App | WA | TERCRAFT | | | | | | | | | - | | | | | | _ |
| Recent Clients | LIST ALL WATTERCRAFT OWNED, LLASED, CHARTLEED OR RURSSHED FOR REGULAR USE | | | | | | | | | | | | | | | | |
| | * | YEAR | MANUFACTURER | | | | | MODEL | | | | | | | LENGTH | HORSE POWER | MAX SPEED |
| John R Jones | | | | | | | | | | | | | | | | | |
| 11 | | _ | | | | | _ | | | | | | | | _ | | |
| | | | | INBOARD / | | | _ | | | | | | | | | | |
| | * | POWER | INBOARD | OUTDRIVE | | SAIL | WATERS NAV | | | GREAT LAKES | | PACIFIC | | GULF OF M | EXICO | | |
| | | | OUTBOARD | INBOARD / | | | TLAN | | | INLAND WATERWAYS | | RIVERS | | | | | |
| | * | POWER | INBOARD | OUTDRIVE | | SAIL | WATERS NAV | | | GREAT LAKES | | PACIFIC | | GULF OF M | Edico | | |
| | | | OUTBOARD | WATERJET | | | ATLAN | | | INLAND WATERWAYS | | RIVERS | | GULF OF M | | | _ |
| | POWER INNUMED OUTDRIVE SAL WATER INVERTED GREAT LARS | | GREAT LAKES | | RIVERS | H | GULF OF M | Edico | | | | | | | | | |
| I L | | | OUTBOARD | WATERJET | | | AIDAN | IR. | | INDAND WATERWAYS | | RIVERS | | | | | |
| | | | | | | | | | | | | | | | | | |
| Colorado Personal Automo | Colorado Personal Automo | | | | | | | | | | | | | | | | |

| Colorado Personal Automo | | | | | | | |
|----------------------------|---|---------------------------------|-------------|-----------|-----|------|---------------|
| Personal Umbrella Applicat | | NAME (AS IT APPEARS ON LICENSE) | | | | | DATE OF BIRTH |
| | ÷ | FERST NAME | MIDDLE NAME | LAST NAME | SEX | STAT | DATE OF BRITH |
| Watercraft Application | | John | R | Jones | М | М | 06/04/1966 |
| | | Brenda | L | Jones | F | М | 08/16/1968 |
| Personal Inland Marine App | | Matthew | J | Jones | М | М | 10/30/2000 |
| | | | | | | | |

3.2 SCENARIO 2: HIGH RISK HOME & AUTO

3.2.1 Add a new client

3.2.1.1 Add a new client/prospect by selecting *+New Client* from the top left area of the screen under *'File'*.



- 3.2.1.2 This takes you to the 'New Client Info' screen where you will enter the basic information about your client/prospect.
 - Select 'Personal' for a personal lines applicant
 - Select 'Commercial for a commercial lines applicant

Personal

Commercial

- 3.2.1.3 Choose 'Personal' and enter all mandatory fields on New Client Info screen:
- 3.2.1.4 Choose a package on the list and select 'Create'. For this client *select 'Home, Auto Complex with Umbrella' from 'Choose a Package'*; a green check will appear next to the package you have selected. Note that if you do not want to use an existing package you can choose not to pick a package and just *select 'Create'* and will then be able to choose appropriate ACORD forms.

| return to client New Client | - | |
|-----------------------------|-------------------------|-------------------------------|
| | Personal | Add New Client |
| | Commercial | |
| | New Client Info | Choose A Package |
| First Name * | John | Advanced PL |
| Middle Initials | R | Advanced |
| Last Name | Jones | 4 days and 2 |
| Street Address 1 * | 198 W. Elm Street | Advanced2 Create |
| Street Address 2 | | Basic |
| Unit Number | | Dwelling Fire Monoline Cancel |
| City * | Denver State * Colorado | V Home, Auto Complex wit 🗸 |
| Zip Code * | 80239 Country * U.S.A | V Home, Auto, Marine & U |
| Phone * | (303)999-2563 | Home, Auto, Umbrella |
| Fax | | |
| Email Address | JRJones69@gmail.com | Home, Rental, Auto & Un |

- 3.2.1.5 All applications from your package will then be displayed with client information that was completed as well as your agency information pre-filled in each of the applications. Select each application individually to complete ACORD information on each application.
- 3.2.1.6 To add your state-specific Auto Application to the application set. Choose '*Open Form*'. Filter by *Line of Business* = '*Personal Auto*'; *State* = '*CO*'; in the Search By select *Form Name* and type '*Colorado*'.

| eForms Wizard | | | | | | - 🗆 X |
|----------------------------------|--|--|----------------------|-------------------------|--|----------------------------|
| File Package | s Setup Help | | | | | 9 |
| & & | 🚔 🚑 ★ | B 🖬 🖀 🖨 | () | | | |
| New Open Client Existing Clie | Open Import Client Add To O ent Form Folder Favorites | | ave & Exit | | | |
| Johr | n R Jones 🔻 | | | | John R Jones 198 W. Elm Stree Denver, CO 802 Phone: (303)999 E-mail: JRJones | 39 I-2563 |
| | ← < Homeowner Ap | oplication 🗌 X Personal Umbrella Applicati | on 🗌 🛛 Dwelling Fir | e Application 🗌 🛛 Perso | onal Insurance Application - Appli | cant Information Section > |
| Recent Items | | | 2 3 | 4 5 6 | | |
| | ork / School Add | | | | | DATE (MM/DD/YYYY) |
| Accidents | / Convictions Sc | HOMEC | | RRIER | | NAIC CODE |
| Young Dr | iver Questionnai Northern Colora 500 Broadway | do Agency | | MED INSURED(S) | | |
| Medical S | tatement Denver | | | ohn R Jones | | |
| Good Stu | dent Driver Irain | avid Jones | 0 80231 | | | |
| | PHONE (and the fract | 03)555-1212 | | | | |
| | | | | | | |
| 🔺 Ope | n Form | | | | – 🗆 × | |
| 51 | | | | | | |
| Filte | r Ву | | | | | |
| | Type All V | Line of Business Persona | Auto V | State CO | V | |
| | | | | | | |
| | Search By | | | | _ | |
| | Form Name | V Colorado | | | | |
| | | enter seach term he | re, i.e. auto | | | |
| | Form Name | | Form Num | Type of Form | Line of Business | |
| | Colorado Auto Supplement | : | 61 | Personal | Personal Auto | |
| | Colorado Auto Supplement | : - Colorado Offer of Medical Paym | 64 | Personal | Personal Auto | |
| ~ | Colorado Personal Automo | bile Application | 90 | Personal | Personal Auto | |
| | Colorado Personal Auto Ap | plication Section | 290 | Personal | Personal Auto | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| < | | | | | > | |
| 1 F | orm(s) Selected | | | Open | Cancel | |
| | | | | | | |

3.2.1.7 Complete the application and Save & Exit.

4 COMMERCIAL LINES SCENARIOS

4.1 SCENARIO 1: CYBER

4.1.1 Add a new client

4.1.1.1 Add a new client/prospect by selecting *+New Client* from the top left area of the screen under 'File'.





- 4.1.1.2 This takes you to the 'New Client Info' screen where you will enter the basic information about your client/prospect.
 - Select 'Personal' for a personal lines applicant
 - Select 'Commercial for a commercial lines applicant
- 4.1.1.3 Choose 'Commercial' and enter all mandatory fields on New Client Info screen: Secure Horizon Retirement Resort C Corp 3950 S Madison Ave Littleton, CO 80111 303-999-9999 sylviahess@securehrr.com

| Forms Wizard | - 0 |
|--|--------------------------|
| File Packages Setup Help | |
| And Mexicon Open Client Open Form Import Client Folder Add To Favorites Open From Favorites Import Save as/ Export Import Save & Export Import Save & Export | |
| return to client | |
| New Client 🔻 | |
| Add New Client | |
| Personal Commercial | _ |
| New Client Info | Choose A Package |
| Company Name * Secure Horizon Retirement Resort | Basic |
| Company Type * ("C" Corporation V | Construction |
| Contact Name Jennifer Smith | Cyber 🗸 |
| Street Address 1 * 3950 S. Madison Avenue | Demonstration Create |
| Street Address 2 | |
| Unit Number | Farm Ag Cancel |
| City * Littleton State * Colorado V | Management Liability w (|
| Zip Code * 80111 Country * U.S.A V | Plumbing |
| Main Phone * (303)999-9999 | Plus |
| Fax | Professional Accountant |
| Email Address (sylviahess@securehrr.com | v v |

- 4.1.1.4 Choose the appropriate package if you have one and select 'Create'. For this client *select* 'Cyber' from Choose a Package; note that if you do not want to use an existing package you can choose not to pick a package and just *select* 'Create' and will then be able to choose appropriate ACORD forms.
- 4.1.1.5 All applications from your package will then be displayed with client information that was completed as well as your agency information pre-filled in each of the applications. Select each application individually to complete ACORD information on each application.
 - When more than 4 applications are included you can use the right and left arrow keys (< & >) on each side of the application display to display other selected applications.

| A eForms Wizard | | - 0 | × | | | | | | |
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| File Packages Setup Help | | | 1 | | | | | | |
| New Open Client Existing Client Form Form | Add To Open From Save as/ Share Print Save & Favorites Favorites Capot - Exit | | | | | | | | |
| Secure Horizon Retirement Resort | Secure Protrano Re 3950 S. Madison ↓Littleton, CC 8011 Phone: (303)990- E-mail: sylviahess | Avenue 11 9999 | | | | | | | |
| ← 🔄 | cation - For Use in Management; Executive & Professional Lines - Applicant Section 🗌 Cyber and Privacy Coverage Section 🗌 Technology Ed | &O Section 🗌 | X > | | | | | | |
| Recent Items | 1 2 3 4 | | | | | | | | |
| Technology E&O Section | AGENCY CUSTOMER ID: | | | | | | | | |
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| Defines Marks / Calcard Add | Northern Colorado Agency OLICY NUMBER EFFECTIVE DATE APPLICANT / FIRST NUMED INSURED | - | - 1 | | | | | | |
| Accidents / Convictions S | Secure Horizon Retirement Resort | | | | | | | | |
| | IMPORTANT - If CLAIMS MADE is checked in the POLICY / COVERAGE INFORMATION section below, this is an application for a claims-made policy. Read all provisions of the policy carefully. | | | | | | | | |
| Recent Clients | ARGERS / ACQUISITIONS / JOINT VENTURES | | - | | | | | | |
| | LIST ALL MERGERS OR ACQUISITIONS BY YOUR COMPANY (INCLUDING YOUR SUBSIDIARIES) IN THE PAST S YEARS, IF ANY OCCURRED, RLEASE ENCLOSE THE CONTRACTUAL AGREEMENTS). | | | | | | | | |
| John R Jones | 1 | | | | | | | | |

4.1.1.6 To remove an application from the selected package select the 'X' from that particular application.



- 4.1.1.7 To add an application from the selected package select '*Open Form*' from the top left of the screen and a popup page will appear to select the additional forms by checking the boxes to the left of the form name and select 'Open'.You can search for the desired form by:
 - ✓ Filtering by Type, Line of Business and State
 - ✓ Searching by form name, form number, edition or key words
 - ✓ Scrolling through forms list

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- 4.1.1.8 Use the paging buttons at the top or bottom of each application or enter the page number at the bottom of each application to move forward or back.
 - The selected page will be in bold on the top of each application where total number of pages is displayed.

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| | 1 | 2 | 3 | 4 | | | | |

- As you complete each field you can you your tabbing button to move to the next field and screen will automatically scroll down or you can use the scroll from the right side of the application.
- The selected page will be displayed at the bottom of each application next to 'Current Page'

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|---------------------|---|---|--|
| ACORD 180 (2016/03) | Page 1 of 4 | • 1997-2015 ACORD CORPORATION. All rights reserved. | |
| | Attach to ACORD 125 | | |
| | The ACORD name and logo are registered marks of ACORD | | |
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| | Current Page 1 | 🔰 Total Page 4 | |

- 4.1.1.9 Information that is input and used in different selected package application(s) will automatically pre-fill. Complete the Professional/ Specialty Ins. Application information and when you access the later pages in the application the information will already be pre-filled.
 - Likewise, when any of the applications are updated system will also automatically update the other line of business.

4.2 SCENARIO 2: AGRICULTURE

4.2.1 Add a new client

4.2.1.1 Add a new client/prospect by selecting *+New Client* from the top left area of the screen under 'File'.



- 4.2.1.2 This takes you to the 'New Client Info' screen where you will enter the basic information about your client/prospect.
 - Select 'Personal' for a personal lines applicant
 - Select 'Commercial for a commercial lines applicant
- 4.2.1.3 Choose 'Commercial' and enter all mandatory fields on New Client Info screen: Clark Farms 18930 Hwy 83 Franktown, CO 80133 303-999-9999 info@clarkfarms.com
- 4.2.1.4 Choose the appropriate package if you have one and select 'Create'. For this client *select* '*Farm Ag' from Choose a Package*; note that if you do not want to use an existing package you can choose not to pick a package and just *select 'Create'* and will then be able to choose appropriate ACORD forms.
- 4.2.1.5 All applications from your package will then be displayed with client information that was completed as well as your agency information pre-filled in each of the applications. Select each application individually to complete ACORD information on each application.
- 4.2.1.6 All applications from your package will then be displayed with client information that was completed as well as your agency information pre-filled in each of the applications. Select each application individually to complete ACORD information on each application.

5 FORM NAVIGATION

5.1 PAGE VIEW

5.1.1 You can transition through the pages 1 of 4 ways:

- ✓ Tabbing through fields as entering
- ✓ Simply select the page # displayed located in the middle of the border at the top of the ACORD form
- ✓ Typing the selected page number in the 'Current Page' field in the middle of the bottom border at the bottom of the ACORD form
- ✓ Selecting the < or > options in the middle of the bottom border at the bottom of the ACORD form

5.2 ADDING A FORM

- 5.2.1 With the client still open and displayed in left upper corner of screen, select 'Open Form' from the File Menu.
- 5.2.2 You can search for the desired form by:
 - ✓ Filtering by Type, Line of Business and State
 - ✓ Searching by form name, form number, edition or key words
 - ✓ Scrolling through forms list
- 5.2.3 Select desired form or forms and select 'Open'.
- 5.2.4 Added ACORD form/forms will be added to the displayed forms for completion.

6 SAVE OPTIONS

6.1 SINGLE

6.1.1 Individually save only one of many applications of the selected package

6.1.1.1 Select the application you want to save by checking the box to the right of each application name:

| Dwelling Fire Application 📃 Colorado Personal Automobile Application 📝 Colorado Perso | nal Automobile Application 📃 🗴 |
|---|--------------------------------|
|---|--------------------------------|

6.1.1.2 Select 'Save as / Export' from the top of the screen under 'File'



6.1.1.3 Select 'Current Form as PDF' or 'Current Form as AVYST Client Folder'

6.1.1.4 Select where you want to save your document and rename your file if necessary and select *'Save'*



6.2 ALL CLIENT FORMS

6.2.1 Save all applications included in package together

- 6.2.1.1 Select "Save as / Export' from the top of the screen under 'File'
- 6.2.1.2 Select 'All Client Forms as PDF' or 'All Client Forms as AVYST Client Folder'
- 6.2.1.3 Select where you want to save your document and rename your file if necessary and select *'Save'*

6.3 SELECTED

6.3.1 Save only selected applications from your package

6.3.1.1 Select the applications you want to save by checking the box to the right of each application name:

| Dwelling Fire Application 📝 Colorado Personal Automobile Application 📝 Colorado Personal Automobile. | Application 📃 🗴 |
|--|-----------------|
|--|-----------------|

- 6.3.1.2 Select 'Save as/Export' from the top of the screen under 'File'
- 6.3.1.3 Select 'Selected Forms as PDF' or 'Selected as AVYST Client Folder'
- 6.3.1.4 Select where you want to save your document and rename your file if necessary and select *'Save'*

7 SHARE OPTIONS

7.1 SINGLE

7.1.1 Individually share only one of many applications of the selected package by email

7.1.1.1 Select the application you want to share by checking the box to the right of each application name:

| Dwelling Fire Application 📃 Colorado Personal Automobile Application 🔽 Colorado Personal Automobile Application 📃 🗙 |
|---|
|---|

7.1.1.2 Select 'Share' from the top of the screen under 'File'



7.1.1.3 Select 'Current Form as PDF' or 'Current Form as AVYST Client Folder'

7.1.1.4 This will auto generate a new email with the file attached so that you can enter recipient email address and 'Send'

7.2 All

7.2.1 Share all applications included in package together by email

- 7.2.1.1 Select 'Share' from the top of the screen under 'File'
- 7.2.1.2 Select 'All Client Forms as PDF' or 'All Client Forms as AVYST Client Folder'
- 7.2.1.3 This will auto generate a new email with the file attached so that you can enter recipient email address and 'Send'

7.3 SELECTED

7.3.1 Share only selected applications from your package by email

7.3.1.1 Select the applications you want to share by checking the box to the right of each application name:

| Welling Fire Application 🔽 Colorado Personal Automobile Application 🔽 | Colorado Personal Automobile Application 📃 🗴 |
|---|--|
|---|--|

- 7.3.1.2 Select 'Share' from the top of the screen under 'File'
- 7.3.1.3 Select 'Selected Forms as PDF' or 'Selected Forms as AVYST Client Folder'
- 7.3.1.4 This will auto generate a new email with the file attached so that you can enter recipient email address and 'Send'

8 PRINT OPTIONS

8.1 PRINT SINGLE

8.1.1 Individually print only one of many applications of the selected package

8.1.1.1 Select the application you want to print by checking the box to the right of each application name:

| Dwelling Fire Application | Colorado Personal Automobile Application 🚽 | / | Colorado Personal Automobile Application | X | |
|---------------------------|--|---|--|---|---|
| | | | | | - |

8.1.1.2 Select 'Print' from the top of the screen under 'File'



8.1.1.3 Select 'Print Single'

8.1.1.4 Select your printer name and 'OK'

| Int | |
|---------------------------|---------------------------------|
| Printer | |
| Name: Adobe PDF | Properties |
| Status: Ready | |
| Type: Adobe PDF Converter | |
| Where: Documents*.pdf | |
| Comment: | Print to file |
| Print range | Copies Number of copies: 1 - |
| C Pages from: 1 to: 4 | Sa Sa Colote |
| C Selection | 123 123 M Colate |
| | OK Cancel |

8.2 PRINT ALL

8.2.1 Print all applications included in package together

- 8.2.1.1 Select 'Print' from the top of the screen under 'File'
- 8.2.1.2 Select 'Print All'
- 8.2.1.3 Select your printer name and 'OK'

8.3 PRINT SELECTED

8.3.1 Print only selected applications from your package

8.3.1.1 Select the applications you want to print by checking the box to the right of each application name:

| Dwelling Fire Application 🔽 🛛 Colorado Personal Automobile Application 🔽 🚽 Colorado Personal Automobile Application 📃 | X | |
|---|---|--|
|---|---|--|

- 8.3.1.2 Select 'Print' from the top of the screen under 'File'
- 8.3.1.3 Select 'Print Selected'
- 8.3.1.4 Select your printer name and 'OK'