AVYST™
eForms Wizard

WELCOME to eForms Wizard! Our goal with this Setup Guide is to get you and your team up and running quickly with this powerful software. By implementing this tool as your first point of data capture at the point of sale, you will increase your efficiency and get complete and accurate submissions to market faster. Let's get started!

Following this Setup Guide will help you save keystrokes and duplicate entry right from the start.
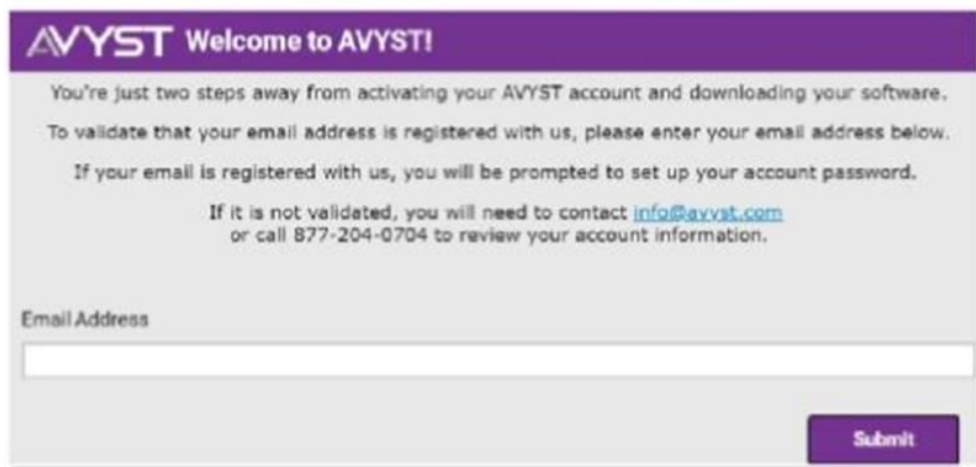
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Download and Install eForms Wizard

From your Welcome Email

Each eForms Wizard subscriber is emailed a "Welcome" email which includes their unique installation URL as well as additional resources and help information. This "Welcome" email is how most new users in an agency or additional users to an agency's eForms Wizard subscription start out. The link will take you to the AVYST portal and allows you to set a password and activate your account. From there, you can download and then install your eForms Wizard software. If using the link in the "Welcome" email, you will find there are some brief instructions for you to follow. The process is further outlined on pages 4/5.

When you click the unique URL provided in your Welcome Email, you will:

- be directed to the AVYST Portal Welcome Page
- be prompted to create your AVYST Portal Account Password (you will need this if you wish to install your software on another machine – like a laptop or table - or if you get a new computer)
- Login and Download (per the instructions onscreen and as noted on pages 4/5)
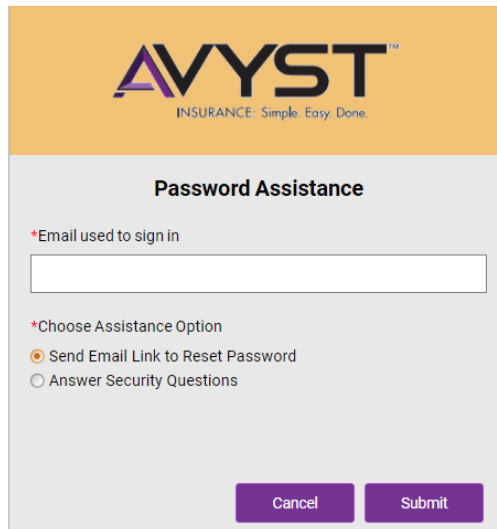
From the AVYST Portal
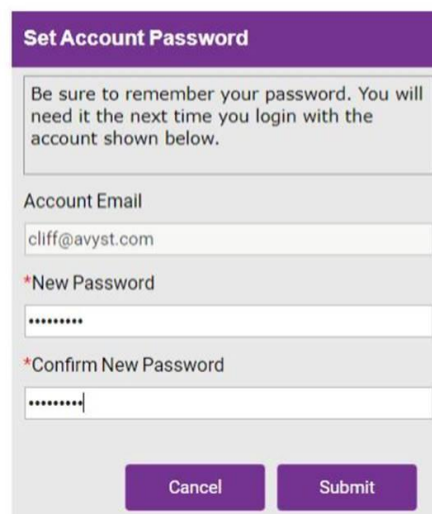
If you don't have this email handy, you can simply go to the AVYST portal at https://portal.avyst.com and use the "Forgot password?" link at the bottom of the screen. Enter the email address you have on file with AVYST and you will be sent an email link to reset your password. Once you've reset your Password, log into the AVYST portal.

Activate eForms Wizard Software

Once you've logged into the AVYST portal, you will have access to Download your software. Select the "Downloads" tile.
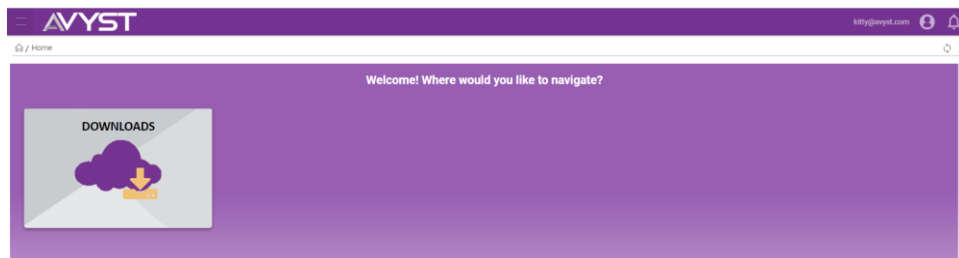
From the Downloads area of the screen, select the Download button.

> **NOTE**: If you are the Subscription Owner or Administrator for your organization's account, you may see multiple usernames listed. Be sure to highlight the correct name / email line before clicking the Download button.
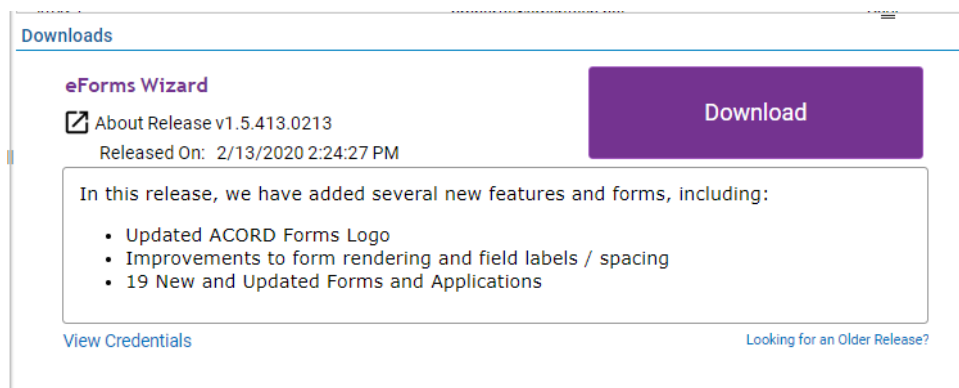
Follow the Installation Instructions on Screen to continue with the download process.

> **NOTE**: When the eForms Wizard download completes, the installation typically starts automatically. Once installation is complete, eForms Wizard should open automatically. Because this is the first time you are opening eForms Wizard, you will be prompted for your credentials. The **license key** you are being asked for, can be found in the onscreen instructions displayed when you originally selected download. **You must use CTRL+C to copy the license key** and then you can use your mouse or CTRL+V to paste the license key into the corresponding field in eForms Wizard – do not attempt to manually type the license key. (see screen shot on next page)

> **NOTE:** There is a chance that if you do not have administrative rights to your local PC/laptop/tablet PC you may need the assistance of someone who does. Your device will ask if you want to allow AVYST/eForms Wizard to make a 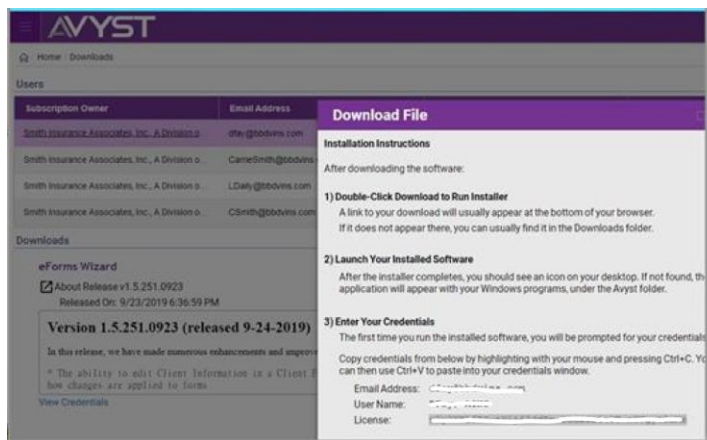change to your machine. If you have administrative rights to your machine, this will be as simple as clicking YES or NO when the window with the question appears. If not, the window will ask for user and password for the installation to finish. If you don't have this information, you'll have to seek the person who does.

> **NOTE**: There is also a chance that your anti-virus or firewall may interfere with the download and/or installation of eForms Wizard. If that happens, one or both will need to be temporarily disabled in order to complete the installation process; after which you can re-enable these security items.

The eForms Wizard software download and installation process should take no more than 10-15 minutes on average. Once your software has been successfully installed, the AVYST icon will appear on your computer's desktop. Double-click to launch eForms Wizard.

Set up your Agency / Agency Branch Offices

To save keystrokes over the long run, take a few minutes to enter your Agency Information, including Branch Offices. While each user can choose to set up their own Agency / Branch information, in organizations with multiple eForms Wizard subscribers, we recommend having one person add all the agency and branch office details. Setup information can then be shared with others using the "Export Setup" link. The recipient of the setup file will use the "Import Setup" link.

- Choose the Setup tab.
- Open the Agency Information screen.
- Select "Add Agency" and enter the requested information.
- Select "Submit".
- In the GOLD Subscription, you can add multiple "Agency" entries. We recommend adding each agency location / branch office.
    - **NOTE**: Each User may "Set default" based on their preference.
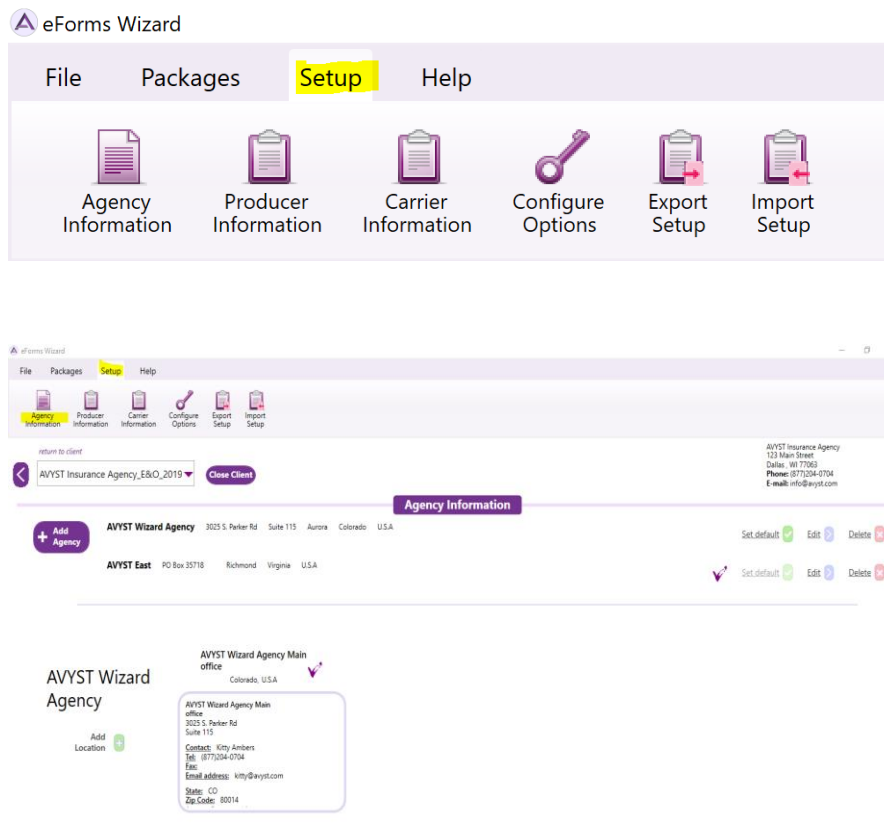
Set up Producers and Assign them to the Appropriate Office

To save keystrokes over the long run, take a few minutes to enter Producer Information. While each user can choose to set up their own Producer information, in organizations with multiple eForms Wizard subscribers, we recommend having one person add all the Producer details. Setup information can then be shared with others using the "Export Setup" link. The recipient of the setup file will use the "Import Setup" link.

- Choose the Setup tab.
- Open the Producer Information screen.
- Select "Add Producer" and enter the requested information.
  - o **NOTE**: Producers are required to be attached to an Agency. If a Producer works out of multiple offices, add them multiple times – once for each office.
- Select "Submit".
- In the GOLD Subscription, you can add multiple "Producer" entries.
  - o **NOTE**: Each User may "Set default" based on their preference.

Set up your Carrier NAIC codes

To save keystrokes over the long run, take a few minutes to enter your primary Carriers and their NAIC Codes. While each user can choose to set up their own Carrier information, in organizations with multiple eForms Wizard subscribers, we recommend having one person add Carrier details. Setup information can then be shared with others using the "Export Setup" link. The recipient of the setup file will use the "Import Setup" link.

- Choose the Setup tab.
- Open the Carrier Information screen.
- Select "Add Carrier" and enter the requested information.
  - **NOTE**: Defaults can be selected by User.
- Select "Submit".

NOTE: Adding your carriers is not as vital as adding your agency, branch office and producer information. From a pure New Business submissions perspective, many agencies leave the Carrier field blank on ACORD forms to make submitting the same ACORD forms to various carriers simpler. However, for renewal submissions, certificates, binders, etc. you may want to have a table of carrier names to choose from within each respective form. Also, for integration purposes, this may become a more important field in the future.

Configure Options

eForms Wizard enables users to configure various features and functionality of the software.

- Choose the Setup tab.
- Choose the Configure Options icon.
- Folder Locations:
    - **NOTE**: Folder Locations default to the local drive of the machine the software is installed on. Many users prefer to set up a shared location as an additional place to save Client Folders.
    - Save as / Export Folder – this is the default location for files that are saved using the "Save as / Export" dropdown list.
    - Client Folders Location – this is where a shared or network drive location would be selected. This should allow the user's work to be saved on a local drive that then will sync with a network or cloud folder once the user is connected to the network or internet.
    - AL3 Folder Location – this is the location where any AL3 export data would be saved.
        - **NOTE**: This comes into play with integration between eForms Wizard and other solutions.
    - User Packages Folder – this is the storage location for Custom Packages created by users. (See the section entitled "Creating Custom Packages for Your Agency").
- Form Options
    - We recommend leaving the defaults, but should you wish to change how the forms appear or behave within the software, you can adjust these settings by individual user.
        - **NOTE:** Many users find it helpful to change the Form Tabs Display to "File Name" for ease of knowing which company forms they have included in their Client Folders.
- Colors
    - Select field colors for Errors, Display of fields as you work through a form, and Printing.

Configure Options

Folder Locations

Save as/Export Folder	C:\Users\Kitty\Documents
Client Folders Location	C:\Users\Kitty\OneDrive - avyst.com\AVYST_WIT\EFW
AL3 Folder Location	C:\Users\Kitty\OneDrive - avyst.com\AVYST_WIT\Integration Testing
User Packages Folder	C:\Users\Kitty\OneDrive - avyst.com\AVYST_WIT\EFW\Packages

Colors

Error in Form Field	
Focused Form Field	
Printed User-Entered Data	Black

Form Options

Display ToolTip	☑
Validate Form Fields	☑
Maximum Tab Width (0=Unlimited)	128
Form Tabs Display	File Name
When Changing Default Agency, Copy Update to Open Forms	Ask
When Changing Default Producer, Copy Update to Open Forms	Ask

Share / Export / Import Setup

In organizations with multiple eForms Wizard subscribers, we recommend having one person add the various Setup details. Setup information can then be shared with others using the "Export Setup" link. The recipient of the setup file will use the "Import Setup" link.

- Choose the Setup tab.
- Open the Export Setup screen.
- Select the setup information to export.
- Choose Export.
- Name and Save the. avcfg (setup information) file.
  - o **NOTE**: Use a descriptive name, especially if you save only part(s) of the setup information.
  - o **NOTE**: Either save to a shared location for others to access or save locally and email a copy to other users with instructions to save to a local drive for import.
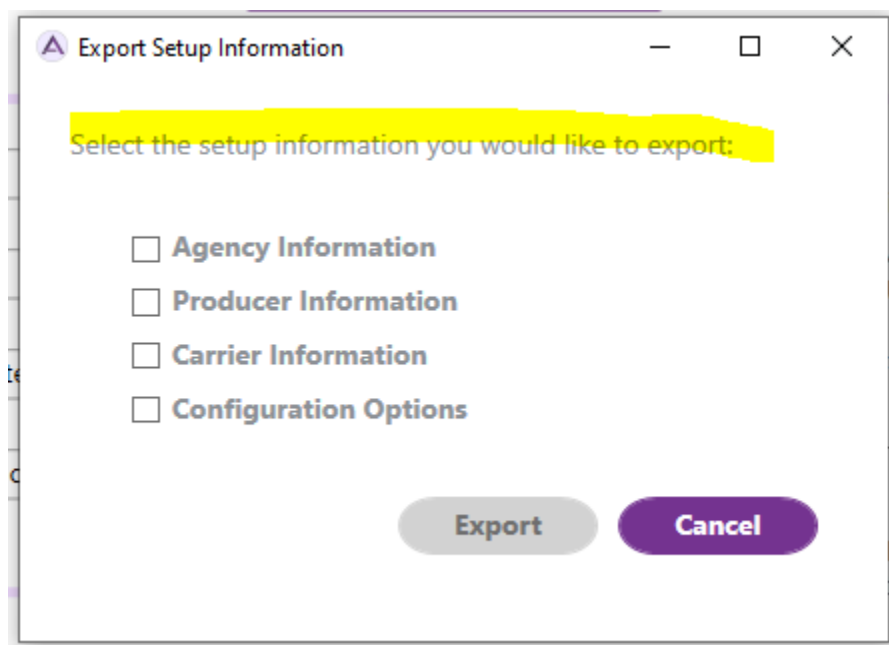
Recipients of the Setup Information file(s):

- Choose the Setup tab.
- Select Import Setup.
- Locate the. avcfg file – shared drive or locally.
- Open the file.
- Select Import.

Create a New Client

As an eForms Wizard user, working in Client Files and Folders is where you will spend the bulk of your time. To get started with a new client folder:

- From the File tab, select New Client.
- Select Personal or Commercial. (Note: the default is Personal)
- Enter Client Information fields.
- You can either Choose a Package and Create, or simply choose Create.
    - **NOTE**: If you choose Create, in the next screen you will be prompted to select a form.
    - **DEFINITION**: A *Package* is group of previously selected forms (ACORD/Non-ACORD) that have been combined based on industry/niche markets or coverages. In the GOLD Subscription, the system comes with several packages included; more can be created, edited and/or shared with users. (see the section *Create Custom Packages for your Agency in this Getting Started Guide*)
- Name your Client Folder.
    - **TIP**: Consider your current file naming conventions. You may wish to establish a standard naming convention for your eForms Wizard client folders, too. The default is the *Client Name YEAR-MO*. Another suggestion is: *Client Name EFF YEAR/EXP YEAR* (term of the policy/account (2020/2021)
- Choose Create.

Select Forms to Add to the Client Folder (submission)

If a Package of forms was not selected as you set up your new client, you will be prompted to "Select Form". The Select Form link (hyperlink or icon), opens the eForms Wizard Forms Library. You can select forms using various Filters:

- Distributor – these are forms providers – carriers, MGAs, wholesalers, ACORD, etc.
- Type of Form – i.e. Personal, Commercial, Bond, Specialty
- Line of Business – i.e. Aviation, Business Auto, Crime, Cyber
- State/Region
- "search term" – like a Google search for terms

Select all the form(s) you wish to pull into the Client Folder by using the "Selected" check box and choose Open.

- **NOTE**: You can add additional forms to the client folder at any time using the same process. You can also choose to add a group of forms ("package") at any time by selecting the Packages tab and Open Package.

Create Custom Packages for your Agency

A powerful feature of eForms Wizard is the ability to create custom forms packages for your organization. Packages can be created based on niche markets, cross-sell and account rounding initiatives, and other sales focused objectives. Once Packages are created, they can be Shared with others which builds more consistent adoption and use.

- From the Packages tab, select New Package.
- Name the Package.
  - **TIP**: You may wish to establish a standard naming convention for your eForms Wizard Packages. For example: Restaurants – Fine Dining_New York; Restaurants – Fast Food Franchise.
- Select LOB Type: Personal or Commercial.
- Create.
- The Forms Library will open.
- Select all the form(s) you wish to include in the *Package* by using the "Selected" check box and choose Save.
  - **NOTE**: You can add additional forms to a *Package* later by choosing "Edit Package".
- Share Package with producers using the "Share *Package*" icon.
  - Select the *Package*(s) you wish to share.
  - Choose "+Share" button.
  - Your Outlook email should automatically open with the *Package* automatically attached to a default email containing instructions for the Recipient of this *Package*.

Save as/Export or Share your Submission

From eForms Wizard, you can easily send your submission to market or share it with a team member to complete the submission process.

You may choose to Share the Current Form (the one currently in your display), Selected Forms (these are indicated with a check mark in the top right of each form tab) or All Forms as either a PDF or an AVYST Client Folder (.avyx).

Share

- From the File tab, select the Share icon.
- Choose what you wish to share and how.
    - Current Form as PDF.
    - Current Form as AVYST Client Folder.
    - All Client Forms as PDF.
    - All Client Forms as AVYST Client Folder.
    - Selected Forms as PDF.
    - Selected Forms as AVYST Client Folder.
- You will be prompted to add a password for your PDF or AVYST Client Folder.
    - **NOTE**: You will need to provide the password to the Receiver of the PDF / AVYST Client Folder under separate cover.
        - You can opt out of creating a password by leaving these 2 fields blank, but it is strongly recommended that you take advantage of this vital security feature.
    - **TIP**: The AVYST Client Folder format is ideal for sharing information with another eForms Wizard user (i.e. teammate, wholesaler) in an editable format so they can continue adding information before the submission is packaged to go to market.
- Select Send.
- You will receive a second data security reminder. Respond Yes or No.
- Your Outlook email will automatically open with the PDF / AVYST Client Folder containing the form(s) automatically attached.
- Address your email.
- Update the Subject Line as desired.
- And a cover note / narrative.
    - **TIP**: Consider using Signature blocks to create standard copy to insert into your email. This helps to minimize typing the same text multiple times.
- Attach any additional external files/documents which may be needed
- Send.
    - **TIP**: A copy of the PDF / AVYST Client Folder can be cc'd to another member of the team for information or tracking; and can be attached to a client folder in a management or document management system.

Save as/Export / Create a Copy

This option is ideal for intentionally saving specific files to a file location – local, shared, cloud. Often, a submission is too large for the "Share" feature as outlined above to work properly with email box or size limits. The Save as/Export feature works very much the same way except the file is saved to a location that can then be shared via a secure link.

Also, the drop-down menu presents you with the opportunity to Create a Copy of the Client Folder. This is useful when renewing or remarketing an account; you will have the option to change the name/term of the client file during this process as well.

Import Client Folder

eForms Wizard users will use this feature to open Client Folders shared by other eForms Wizard users. The recipient of the shared Client Folder will Save the folder to a local or shared drive location. If the recipient is aware of the file location already, they will simply need to navigate to the correct location as part of the import process.

- Under the File tab, select Import Client Folder.
- File Explorer opens.
- Navigate to and Select the desired Client File.
- Open.
- If the file already exists, you will be prompted to Overwrite or Create a New Name.
- Create.

Printing to Paper or eSignature Solution

The Print icon in eForms Wizard connects to your existing print drivers. You can choose to print Current Form, All Forms or Selected Forms to paper. Most eSignature solutions work as a print driver, so you can also use your existing solution seamlessly with eForms Wizard.

REMINDER: Under Setup > Configure Options > Colors, you can select Blue or Black ink color.

Navigation Tips

- Use the "Tab" key to move through form fields.

- You can Exit/Close eForms Wizard by clicking the "X" in the top right-hand corner of the program or you can choose "Save & Exit". Either will save your work before the program closes. eForms Wizard continuously saves as you are working. When you open eForms Wizard again, it will take you to where you left off.

- To switch between forms within a Client Folder use the "hamburger" icon in the top, left corner of the form.   ≡

  This icon provides forms functionality, including:
  - Print
  - Switch
  - Zoom
  - Clear
  - Remove

- To lock a form, use the lock icon in the top, left corner of the form.   🔓

- Change Agency / Carrier / Producer information
  - Use the "arrow" icon to open the appropriate list and make a new selection

- Use the "back arrow" to return to your place in a client folder / form.

- eForms Wizard Updates: Approximately every 45 days on average, there are updates to your eForms Wizard program. When you open eForms Wizard it automatically checks for updates. If there is an update available, you will see the prompt "Update Now". You can choose to go on working without doing the update. Or you can choose to "Update Now". This automated updated process typically takes 5-10 minutes. When the update is complete, eForms Wizard will launch and you will return to where you left off on your last visit. We encourage you to stay as current as possible so you can take full advantage of updated features, functionality and any added forms. Getting too far out of date, can create license verification issues.

Corrections/Updates to Client Folder Information

To make a correction to Client Information entered during the initial setup of a Client, select the Recent Client List dropdown - top left of the screen.

- Select Edit Client Folder.
- Make edits.
- Save.

Edits to Data Fields / Adding or Changing Information in Form Fields

When data entered into a field that is mapped to other fields on forms included in the Client Folder is edited, a drop-down menu of options will appear to ask how the edits should be applied. See the screen shot below. Be sure to make the appropriate selection, otherwise the data edit will only appear in the current form field and will not flow to other forms as expected.

Getting Started Checklist

To Do	eForms Wizard Feature to Master
☐	Download and Install eForms Wizard using the instructions HERE or in the Welcome Email received from AVYST
☐	Launch eForms Wizard from your computer/tablet
☐	Set up your Agency / Agency Branch Offices
☐	Set up Producers and assign them to the appropriate Office
☐	Set up your Carrier NAIC codes
☐	Configure Options
☐	Share / Export Setup with Others OR Import if you are the recipient of the setup file
☐	Create a new client
☐	Select a default package for use with the new client
☐	Search/select additional forms to add to the client submission
☐	Save your Submission (locally, shared drive)
☐	Share your Submission (all or selected forms) as a password protected PDF
☐	Share the entire Submission as an AVYST Client Folder (fillable)
☐	Create Packages for your Agency based on niche markets and Share/Export with your Producers. (Others will Import the Package file to their eForms Wizard)

Additional Resources:

- To Purchase eForms Wizard, visit our Pricing & Subscription Details which includes links to our various partner order forms. Retail Pricing: GOLD (full functionality – best for Producers & Account Managers) - $100/user/year; BRONZE (limited functionality – best for Administrative Staff) - $50/user/year
- Short Videos on various eForms Wizard Features on our Training & Resources webpage
  - Agency & Producer Setup
  - Working with New and Existing Clients
  - Save As, Share and Import a Client Folder
  - Create & Share Custom Packages
  - Printing
- Additional Questions – email info@avyst.com or call 877-204-0704 (option 2)
- Submit Forms to add to eForms Library – email them to kitty@avyst.com
- To Submit Enhancement Ideas please click on this link: https://avyst.com/support/ and click on the "Let us know your great idea" "button" to fill in the form. Thank you – we encourage your input for enhancement ideas!