SmartViewz™

SmartViewz is coming to Smart Office.

AI for life & annuity agents on Zinnia's Smart Office. Every morning it ranks what needs you, by money and deadline, and it answers any question about your book in plain English.

FOR AGENTS · FOR SUPERVISORS · FOR AGENCY OWNERS

ONE STEP TO TURN IT ON

Your agency authorizes SmartViewz in Smart Office

1. **Authorize it once, for the whole office.** Your Smart Office administrator grants BotMakers integration rights. No passwords are shared.
2. **We attach your office.** SmartViewz connects through Zinnia's partner access and your book syncs the same day.
3. **Your people sign in.** Agents see their own book and downline; owners see the whole agency.

Not sure where the setting is? Watch the short how-to video, or contact your Zinnia Smart Office support representative and ask to grant **BotMakers** integration rights to your office.

Watch how to authorize it
training.smartviewz.com/authorize

TODAY
Your day, ranked
Lapses to save, cases waiting on you, clients worth a call.

ASK
Ask your book anything
Plain-English questions, answered as charts and tables in seconds.

CASES
Whose move it is
Every pending case with its step, requirements and days waiting.

MY TEAM
Who needs a hand
Stuck cases, quiet agents and licenses due across the downline.

INSIGHTS
Money the AI found
Revenue at risk and opportunities, each with a dollar figure.

SECURITY
Your data stays yours
Walled-off offices, two-step sign-in, read-only AI, full audit trail.

ISSUED BY
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smartviewz.com
Try the demo: smartviewz.com/try-demo