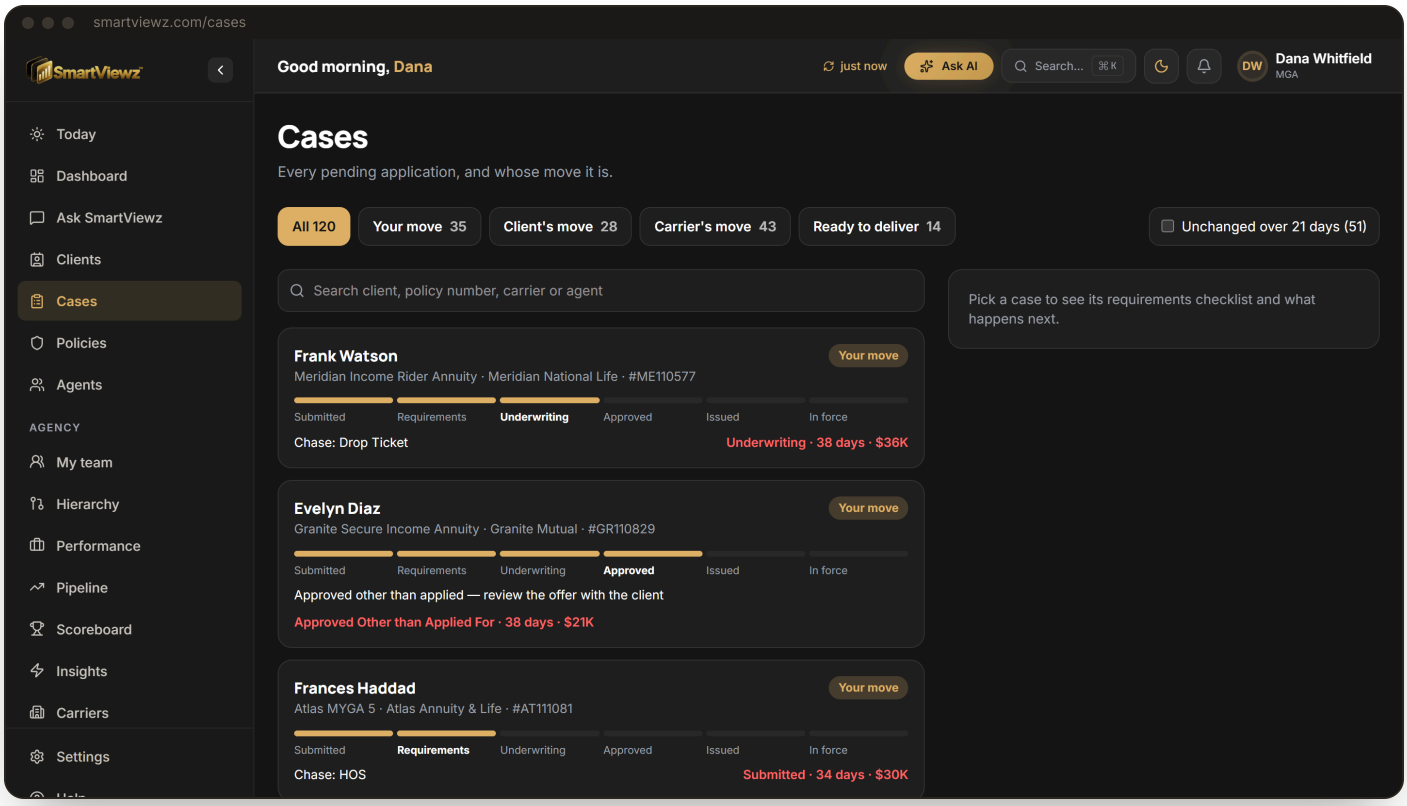
Every pending case, and whose move it is.

No more calling the carrier to find out what's missing. Every application sits on a progress line with its outstanding requirements and how long it has been waiting.

PENDING	WAITING ON AGENT	CHECKLIST	CLOCK
120 cases	**35**	**Requirements**	**Days in step**
across the office	flagged first	what's still missing	stuck cases stand out



1 Whose move it is

Agent, carrier or client: each case says who has to act next.

2 What's missing

The requirements checklist from Smart Office, with what's overdue.

3 Days waiting

How long each case has sat in its step, so stuck business never hides.

Screens and figures: Harborline Financial demo office (sample data).

Get your pending business moving.

See it on a real sample agency, then set it up on your own book in one call.

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TRY THE DEMO

GET STARTED