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
BotMakers, Inc.
A subsidiary of BioQuest (BQST) · smartviewz.com

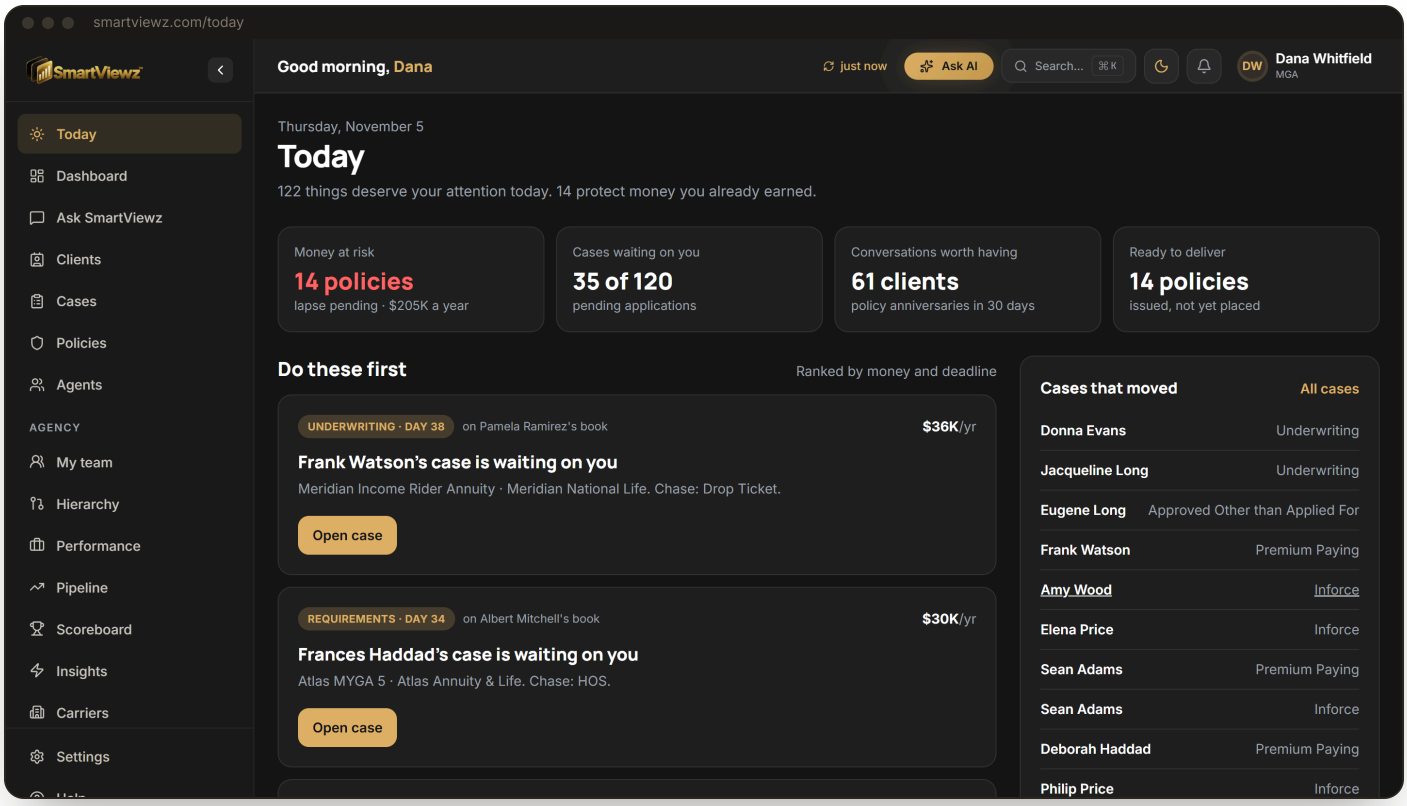
LEARN MORE
smartviewz.com
Try the demo: smartviewz.com/try-demo

01 · FOR AGENTS · TODAY

Know who to call before your coffee's cold.

Today reads your Smart Office book overnight and ranks what needs you by money and deadline: policies about to lapse, cases waiting on you, and clients worth a call.

MONEY AT RISK	WAITING ON YOU	WORTH A CALL	RANKED BY
14 policies	**35 of 120**	**61 clients**	**Money + deadline**
$205K a year, lapse pending	pending applications	anniversaries in 30 days	biggest first



$ Lapses to save

Each lapse-pending policy with its premium and carrier. A call before it lapses usually saves it.

→ Cases waiting on you

The applications stuck on your move, with what's missing, one click from the case.

☎ Conversations worth having

Policy anniversaries coming up: the easiest reviews and referrals of the month.

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

Start every day with the list that pays.

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

LEARN MORE **smartviewz.com**

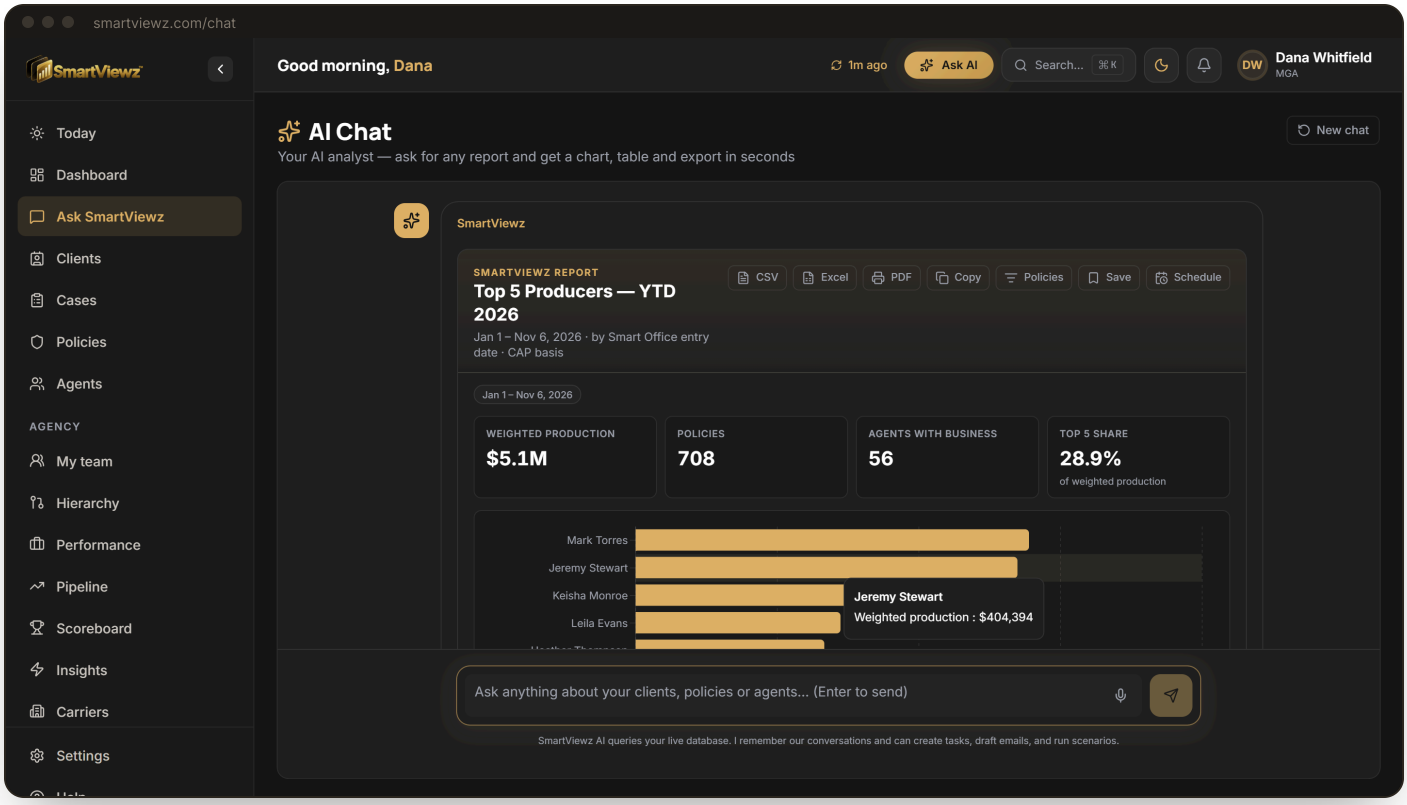
TRY THE DEMO

GET STARTED

Ask your book anything.

Type a question the way you'd say it. SmartViewz answers from your own Smart Office data with the number, a chart and a table, and you can export, save or schedule the answer.

ANSWERS IN	COMES BACK AS	SEES	KEEP IT
Seconds	**Chart + table**	**Only your book**	**Save or schedule**
from your live book	CSV, Excel or PDF	and your downline	weekly to your inbox



Q Questions agents ask

- Which of my policies are about to lapse?
- Which cases have been in underwriting over 30 days?
- Which clients have an anniversary next month?

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

✓ Built to be right

- **Real numbers** from your synced book, never made up
- **Scoped to you:** an agent never sees another agent's book
- **Read-only:** the AI can look, never change your data
- **Shows its work:** every answer says how it was computed

Ask your first question in the demo office.

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

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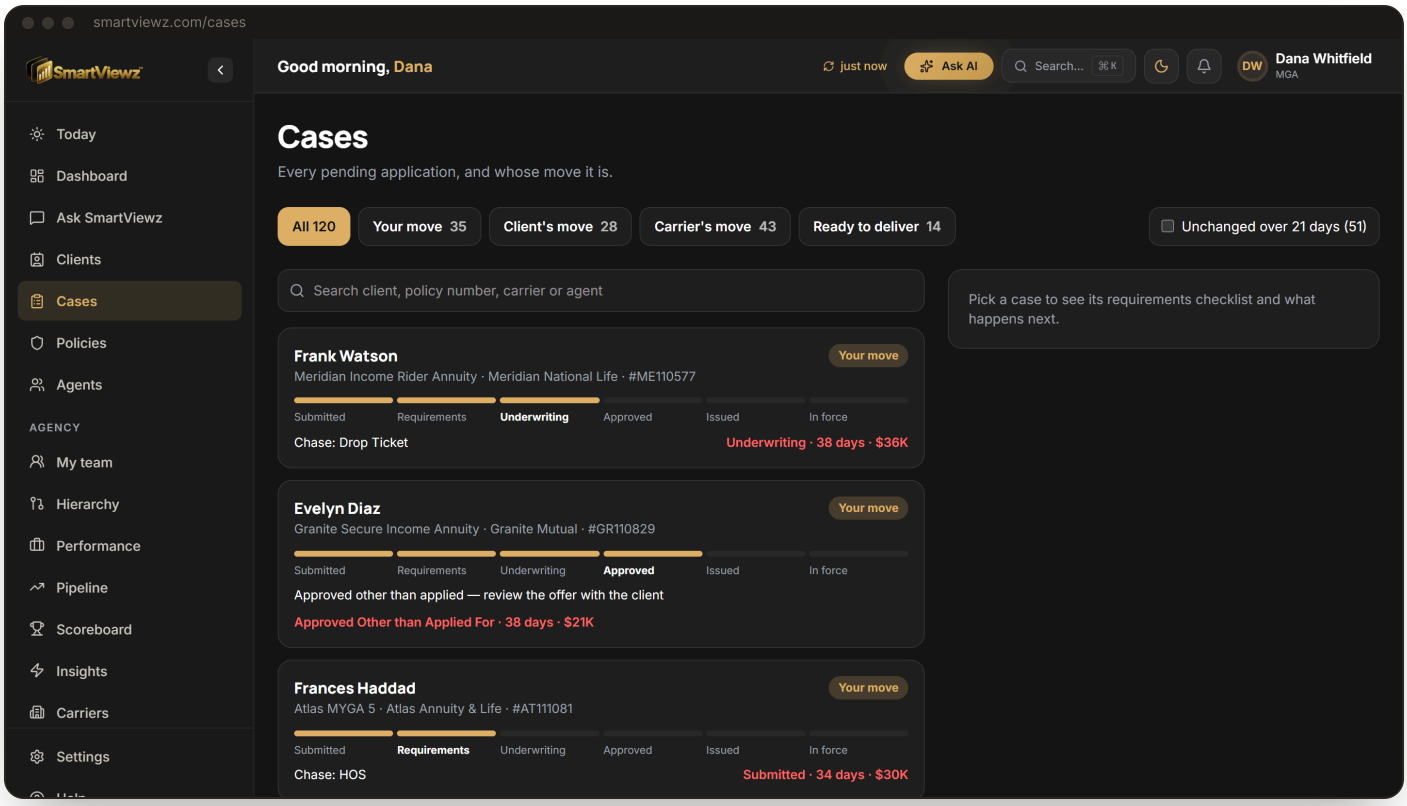
TRY THE DEMO

GET STARTED

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

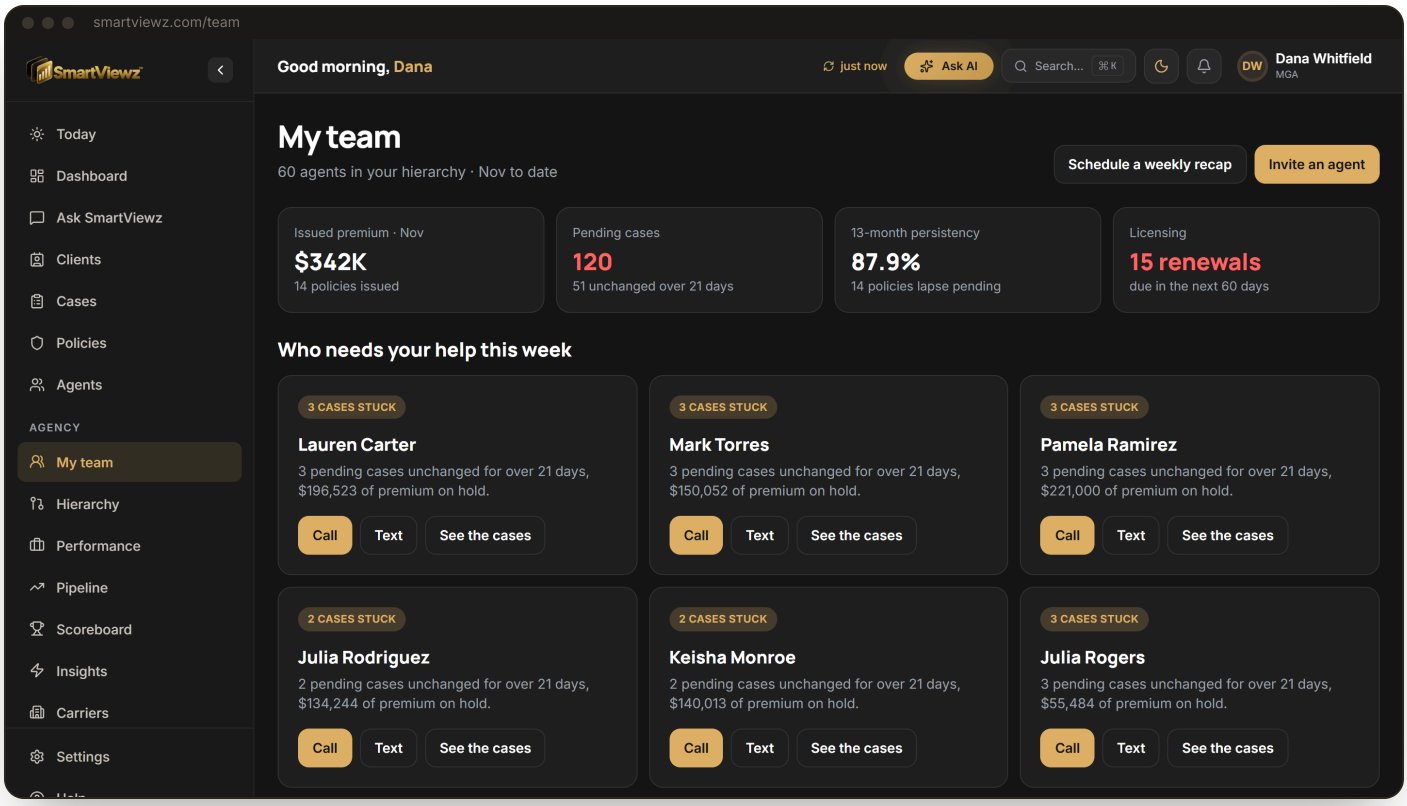
GET STARTED

04 · FOR SUPERVISORS · MY TEAM

Know who on your team needs a hand this week.

Stuck cases, quiet agents and licenses coming due across your whole downline, with production rolled up at every level of the hierarchy.

YOUR HIERARCHY	ISSUED PREMIUM	13-MONTH PERSISTENCY	LICENSING
60 agents	**$342K**	**87.9%**	**15 renewals**
production rolled up	this month	across the team	due in 60 days



Who needs your help

Agents with stuck cases and premium on hold, sorted by who needs you most.

Your org chart

Click any branch to see that part of the downline and how it's producing.

Meeting prep

A one-page brief on any agent before you sit down with them.

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

Run your team from one screen.

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

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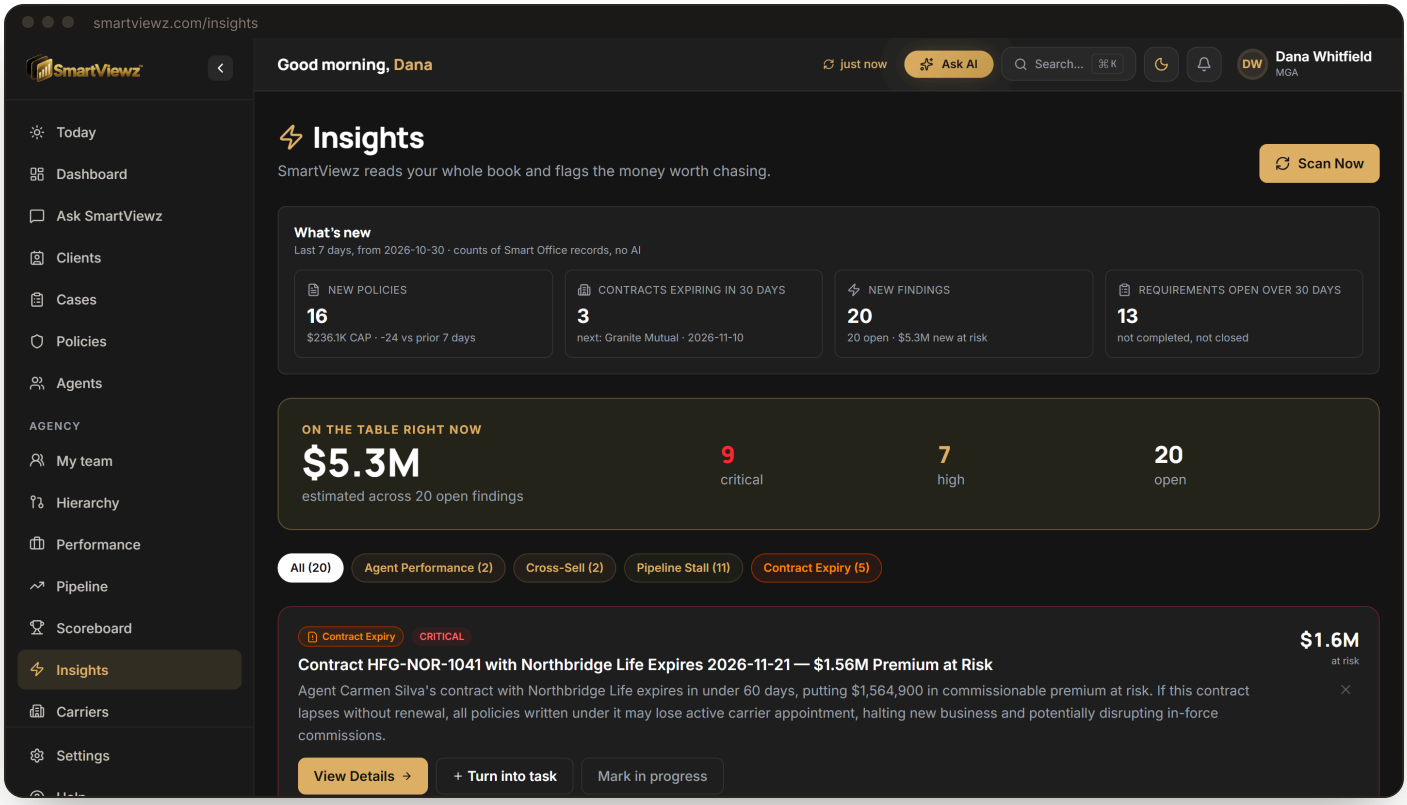
TRY THE DEMO

GET STARTED

Your whole agency, rolled up.

Org-wide production, revenue at risk with a dollar figure, and every producer ranked, refreshed from Smart Office automatically.

FLAGGED THIS MORNING	WEIGHTED PRODUCTION	PRODUCING AGENTS	TOP PRODUCER
$5.3M	**$5.1M**	**56**	**$416,604**
across 20 findings	year to date	ranked on the scoreboard	weighted, YTD



$ Money the AI found

Expiring contracts, stalled cases and cross-sell openings, each with a dollar figure and next step.

Scoreboard

Leaderboards for the agency or any branch, with progress to goal.

↗ Performance

Production by agent, carrier and product, with trends over time.

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

See your agency rolled up.

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

Never miss a license renewal.

Licenses, appointments, overdue requirements, CE hours and E&O for every agent in one place, with alerts before anything lapses.

LICENSES	REQUIREMENTS	CE & E&O	ALERTS
By state	**Overdue first**	**On file**	**Before it lapses**
expiry tracked	from Smart Office	per agent	not after



Every agent at a glance

Who is clear, who has something due, and who is overdue.

Early warnings

Licenses and requirements flagged weeks before they become a problem.

My compliance

Each agent sees their own licenses, CE hours and E&O in one place.

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

Keep every agent writing business.

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

Your agency's data stays your agency's.

SmartViewz handles the book of business you connect from Smart Office. Here is how it is protected. Our full security brief was prepared for Zinnia's integration review.

OFFICES	SIGN-IN	AI	ACTIVITY
Walled off	**Two-step**	**Read-only**	**Audit trail**
enforced on the server	for every user	never trains on your data	append-only

Each office is walled off
A signed-in user can never reach another office's book.

Each person sees only their part
Agents their book and downline, supervisors their team, owners the agency.

Two-step sign-in
Every user can turn it on; owners can require it for the whole office.

Changes confirmed by email
Password, phone and email-connection changes need a code sent to the registered address.

Append-only audit trail
Sign-ins, views and changes are recorded in a log that can't be rewritten.

AI that only reads
Scoped, read-only tools. Your data is never used to train models for anyone else.

Encrypted in transit and at rest
TLS everywhere, on a managed database with row-level security.

Locked-down browser policy
Signed-in pages block any script the app didn't issue.

Have a security questionnaire? We'll walk you through it.
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

From yes to your own book in one call.

SmartViewz runs on the Smart Office data your agency already has. There is nothing to install and nothing to move.

1 **Authorize SmartViewz in Smart Office**
Your Smart Office administrator grants BotMakers integration rights to your office, once. The how-to video is at training.smartviewz.com/authorize, or ask your Zinnia Smart Office support representative.

2 **Book a 30-minute setup call**
At smartviewz.com/get-started. Tell us about your agency and pick a time.

3 **We connect your office**
Your policies, cases, agents, contracts and licenses sync the same day, then keep syncing automatically.

4 **Your team signs in**
Everyone starts on Today, with a short setup checklist and six training courses at training.smartviewz.com.

$ Plans · every plan includes the full app and AI

INDIVIDUAL
$149 /month
For independent agents. One login, your whole book.

TEAM
$129 /user/mo
2–20 users. Full hierarchy and downline, custom branding.

AGENCY
$99 /user/mo
20+ users. Roll-ups at every level, priority support.

ENTERPRISE
Custom
Large BGAs and multi-office operations, dedicated onboarding.

Annual billing saves 20%.

Ready when you are.
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