SmartLink for Quik! Forms

Automating the time-consuming task of form filling

Filling out forms is a necessary and time-consuming task that is an integral part of your business. As your business grows, the number of forms you need to manage grows as well — and every one of your vendors is constantly updating their individual forms, making the challenge more complex than ever. From the challenges of going to multiple websites to get appropriate forms, entering your client demographics, verifying information, and handling errors resulting from data redundancy and re-entry, staying on top of the basic task of form filling can be a tedious challenge.

Simplify Form Filling and Get Back to Selling

SmartLink for Quik!™ Forms integrates trusted form-filling software from Quik! Forms with your SmartOffice solution to simplify the process of managing and filling out the forms you use every day. Easy to use, SmartLink for Quik! Forms transfers your client data and key relations with a click of a button, and automatically launches the Quik! Forms Library. Your SmartOffice contact data is automatically transferred to the most current forms from each of your vendors. Automated form filling transfers approximately 80 percent of the information needed for each form directly from your SmartOffice database to the appropriate form. And the solution automatically checks for updates to ensure you have the right form every time.

The result: an easy-to-use, integrated solution that minimizes data entry, reduces errors, and speeds processing.

- *Speed the form-filling process*
- *Eliminate redundant data entry and reduce human error*
- *Leverage a complete online library of updated forms*
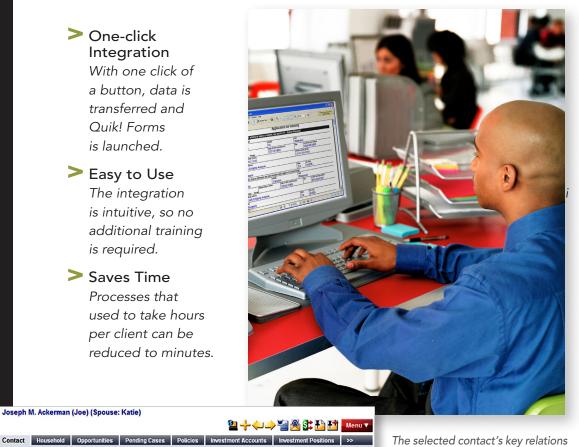- *Update forms automatically via an online update service*

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SmartLink for Quik! Forms provides these valuable benefits

> **One-click Integration**
> *With one click of a button, data is transferred and Quik! Forms is launched.*

> **Easy to Use**
> *The integration is intuitive, so no additional training is required.*

> **Saves Time**
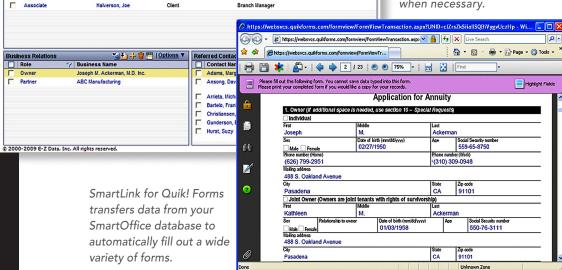> *Processes that used to take hours per client can be reduced to minutes.*

The selected contact's key relations are also transferred to Quik! Forms, enabling the user to select the appropriate joint applicant, beneficiary, and/or annuitant when necessary.

SmartLink for Quik! Forms transfers data from your SmartOffice database to automatically fill out a wide variety of forms.

Take the next step toward superior service, greater growth, & better business:

- **SmartOffice® Professional Edition for Insurance Agents**

- **SmartOffice® Premier Edition for Financial Advisors**

- **SmartOffice® Premier Edition for Brokerage General Agencies**

To learn more about the SmartOffice solution designed for your business,

call 800-777-9188 or go to www.ezdata.com.

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