

BookSmart®

Book of Business Transfers, Revolutionized.

Our BookSmart® application is the first automated solution for processing Books of Business. Whether you're acquiring a book from an agent, processing one purchased from another carrier, or migrating policies from one policy administration system to another, BookSmart® gives you a flexible, scalable solution that takes the pain out of policy transfers.

Efficiency Redefined.

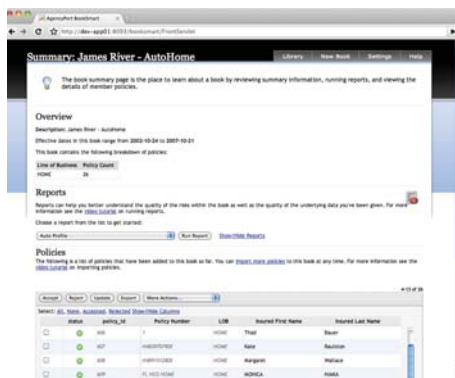
While book roll transfers can be tremendous new business opportunities, their execution can be crippling ... until now. BookSmart® integrates quickly and easily with rating, point of sale and policy systems to move book data electronically, and without re-keying. Make adjustments to policy data, transforming coverage codes or other values specific to the prior carrier before moving the policies over. Bulk upload, group or global update and Excel download capabilities also allow agents to update and return policy information.

Smarter Risk.

BookSmart® provides users with an easy-to-use, flexible means to evaluate, edit and report on data that resides within the book roll application. Its reporting capability improves the accuracy of analysis and overall assessment of the book's quality, helping companies better qualify the risk of a book of business. Smart.

Easy on Agents.

Why not start off on the right foot with a new agency partner, or remind an existing agent why you're the best carrier with which to work. BookSmart® lets you get in and get out without having to take over an agency's systems, print declaration pages, or invade their systems. BookSmart® helps you automate your process and look good in your agent's eyes.



Built on ACORD XML.

Like all of our products, BookSmart® is based on ACORD XML standards and designed to be integrated with your policy administration system, rating engine, and rules engine. Because all data is stored in ACORD XML, it can be sent by policy or in bulk to company systems or rating engines at any point within the book transfer evaluation.

BookSmart® Highlights

Consumes bulk data "bridged" from supporting agency management systems (ie. AMS- TRANSIT TWS), if available from the agency vendor system export service.

Includes numerous other 'import modules' designed to facilitate collection of policy data one at a time or in bulk from a variety of sources including AL3, ACORD XML, spreadsheets or management system query and output reports.

Provides a fully functional book roll application to automatically or manually evaluate, report, view and edit data on a policy or "book" basis.

Integrates with rating and rules engines to automatically prepare a timely, accurate and complete response to your producers.



For a complete listing of our
offices please visit our website

www.sword-group.com

Sword AgencyPort

211 Congress Street

11th Floor

Boston, MA 02110

† 1 866 539 6623

www.sword-insurance.com