DataXchange Online -
Appointment Download
User Guide

SmartOffice®

918 E. Green Street

Pasadena, CA 91106

Web: http://www.ez-data.com

Telephone: (626) 585-3505
Fax: (626) 440-9097
U.S. toll-free fax: (800) 779-3123

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Introduction

DataXchange Online – Appointment Download is a SmartOffice service that enables a General Agency to receive Appointment information from carriers. At this time, the data received contains Advisor appointments only and does not contain licensing and contracting information.

- The Appointment download provides an electronic means of receiving information saving both time and resources.
- The Appointment Download is ACORD compliant.
- To use the DataXchange Online – Appointment Download, users must first register with DXO 1.0.
- Appointment data is received just like the Pending Case Download which is retrieved from the DataXchange server mailbox using a unique and secure login.

Registering for DataXchange Online

Users must phone their E-Z Data customer service representative to register for DataXchange Online services. E-Z Data will assign the user a mailbox on the DataXchange (DX) Server. Users already signed up with the DataXchange Online – Pending Case Download service can use the Appointment Download in SmartOffice upon signing up with E-Z Data to receive Appointment data feeds from carriers.

The same mailbox used for Pending Case downloads is used for Appointment downloads. Appointment data is delivered to the AgentUpdates sub-folder of the mailbox much like the way Pending Case data is delivered to the PendingCase or XMLPendingCase sub-folders; Service Provider 850 data is delivered to the ReportStatus sub-folder.

Appointment Download Setup

Prior to loading data to SmartOffice tables, a System Office administrator needs to add the Advisor Office Map records associating the SrcProvider (69868) and SrcAgencyNumber (0172751, 0400996, and 0405105) values with a SmartOffice Office. In order for Appointment Download data to process successfully into SmartOffice, the mapping tells the DataXchange Enterprise engine which office the data belongs to.

1. Log in as the System Office Administrator and then select **Advisor Office Map** from the expanded **DataXchange** menu to open the Advisor Office Map Search dialog box.

2. Click the **Search** button to display the Advisor Office Map Summary.
3. Click the **Add** button to open the Advisor Office Map Information dialog box.

o   Carrier ID or Carrier Code is the SrcProvider. Enter this value in the Provider field.

o   The CompanyProducerID is the Appointment Number, the carrier identification number for the advisor. Enter the value in the Agency Number (SrcAgencyNumber) and Agency License Number (SrcAgentLicenseNum) fields; the value is the same for both fields.

Appointment Tables in SmartOffice

- The file that is retrieved from the DataXchange Server mailbox is read into Appointment staging tables. Data in staging tables cannot be seen by a user from SmartOffice.
    o   ADMAppointment
    o   DSIAdvisor
    o   PDMVendor
- Another process takes the data from the staging tables to production Appointment tables that can be viewed by users.
    o   Appointment
    o   Agent
    o   Vendor

Appointment Data in SmartOffice

1. To view the downloaded Appointment record(s) in SmartOffice, select **Advisor/Agency Search** from the **Advisor/Agency** expanded menu to open the Advisor/Agency Search Option dialog box.
2. Click **Search** to display the Advisor/Agency Summary.
3. Tag or highlight a record and then click the **Cont./Appt.** tab.
4. The Appointment Information section displays.

	Carrier Name	Appointment	Start Date	End Date ⇧	Status
☐	United of Omaha	0400996	08/25/2005		Active

5. Click the **Add** button in the Appointment Information section to display the Appointment Information dialog box.

6. Enter the Carrier, Appointment #, appointment state and lines of business (LOB) that the Advisor can do business for and then click the **OK** button.

Background Service

The SmartOffice Appointment download is a background service that runs automatically at pre-defined time intervals in a configuration file.

Other Processing Details

- The License & Appointment download will only process Agent/Person records. Organizations will not be processed.
- The GovtID (TaxID) is mandatory data for the XML file.
- Single rows are inserted for each appointment state. By doing so, the corresponding Start/End Dates and Statuses are provided. This is similar to SmartOffice enabling the creation of multiple appointment records with the same appointment number.
- There must be one appointment record per carrier per advisor.
- The value for DSIADVISOR_RECORDTYPE is set to 1 (for Individual). The column must be populated for the processing of Advisors to work.
- A lookup table is provided to map ACORD codes to staging column lookup values. The staging column lookup values are in line with the Production column lookup values.
- The SrcProvider column in the DSIAdvisor staging table cannot be blank because the Carrier Code is mapped to the DSIAdvisor SrcProvider column.