

# Fast•Class File

SmartOffice

## Volume 52: The Consolidated SmartPad™

A Consolidated SmartPad will display SmartPad records for a selected group of contacts. The consolidated SmartPad is a useful and flexible tool that can be used for activity workflow research, to track the success of initial calls made to a group of prospects. The consolidated SmartPad can also be used to review policy, investment, and activity data captured for each member of a family or household. You can also use the Consolidated SmartPad to review information for some or all individuals affiliated with a business.

A Consolidated SmartPad can be launched from:

- An **Individual Contact Summary** screen
- The **Household** tab of an individual contact record
- The **Key Relations** tab of an individual or business contact record
- The **Employee Census** tab of a business contact record

### Individual Contact Summary screen Consolidated SmartPad:

- Perform a contact search.
- In the **Individual Contact Summary** screen, select specific contact records to include in the Consolidated SmartPad by tagging each selected record, or select all records with the **Tag All** option.
- After selecting contact records, click the **SmartPad** button in the global toolbar (at bottom right-hand corner of SmartOffice).



Figure 1: The SmartPad button in the Global toolbar.

- SmartOffice will launch a Consolidated SmartPad displaying all SmartPad records for the selected contacts.

SmartOffice will automatically add a **Contact Name** column to the Consolidated SmartPad so that it will be easy to determine which contact each SmartPad record belongs to. Each name in the **Contact Name** column is a hyperlink that will open an editable **Contact Detail** screen containing the same information available on the **Personal** tab of the individual contact record of the selected contact.

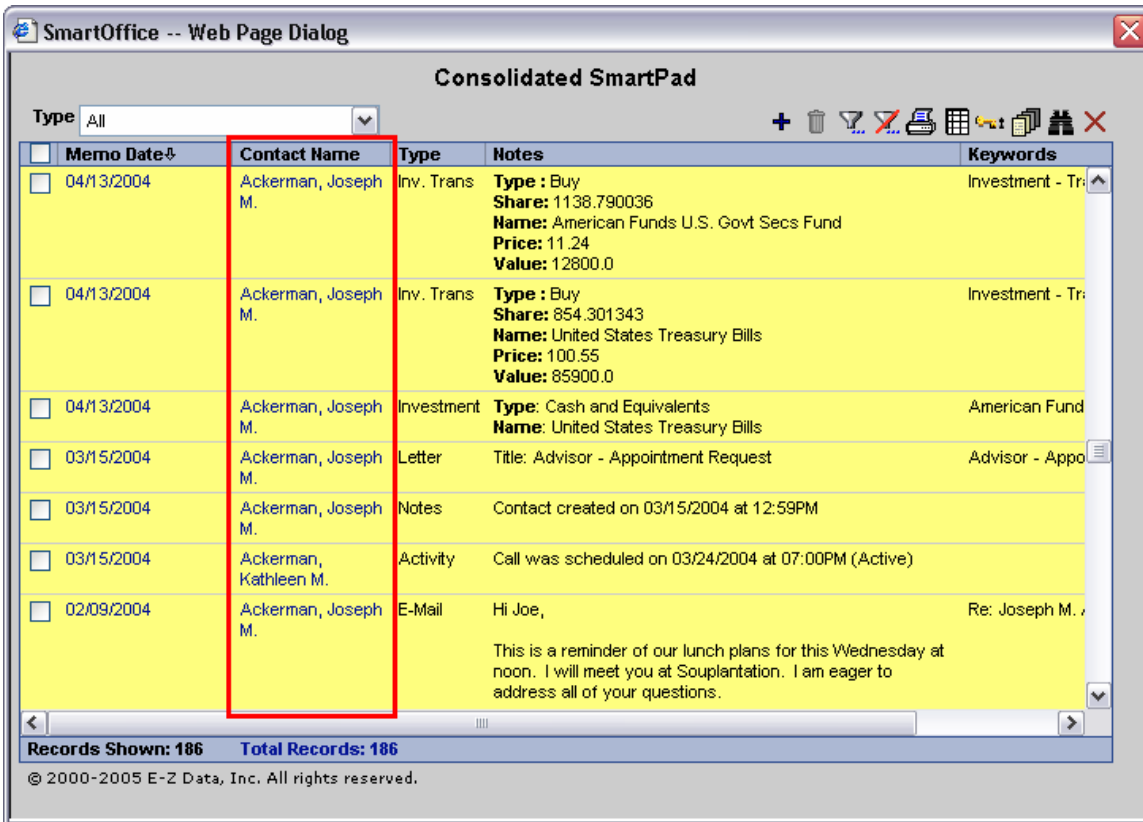


Figure 2: The Consolidated SmartPad (Contact Name column highlighted).

The first column (in Figure 2 the **Memo Date** column) contains links to the type of information contained in the SmartPad. For instance, if the SmartPad record references an activity, the hyperlink in the first column will open an activity detail screen. If the SmartPad record refers to a letter, the link in the first column will open the referenced letter and so on.

**Important Note:** The first column is reserved for the SmartPad entry type specific link. If you choose to move the **Contact Name** column to the first column, the **Contact Name** link will become the SmartPad entry type link and will open information relevant to the SmartPad entry and not the individual contact detail screen. For this reason, E-Z Data recommends leaving the **Contact Name** column in the default second column position in the Consolidated SmartPad.

By default, all SmartPad entry types will be loaded into a Consolidated SmartPad. Entry types can be filtered using the Consolidated SmartPad **Type** drop-down.



Figure 3: The Consolidated SmartPad Type drop-down.

## Household Tab Consolidated SmartPad:

- Open a contact record.
- Select the **Household** tab.
- Select the contact records for which a consolidated SmartPad will be viewed in the **Household Members** section of the **Household** tab. Tag specific contact records or use the **Tag All** option to select all of the contact records.
- Click the **SmartPad** button in the **Household Members** toolbar.

<input checked="" type="checkbox"/>	Role	Contact Name
<input checked="" type="checkbox"/>	Head	Ackerman, Joseph M.
<input checked="" type="checkbox"/>	Wife	Ackerman, Kathleen M.
<input checked="" type="checkbox"/>	Daughter	Ackerman, Marianne
<input checked="" type="checkbox"/>	Son	Ackerman, Kenneth

Figure 4: The Household Members section of the individual contact Household tab (with selected contacts and highlighted SmartPad button).

- SmartOffice will launch a Consolidated SmartPad displaying all SmartPad records for the selected contacts.

## Key Relations Tab Consolidated SmartPad:

- Open an Individual or Business contact record.
- Select the **Key Relations** tab.
- Tag selected contact records in one of the sections of the Key Relations tab or use the **Tag All** option to select all of the contact records in one section.
- Click the **SmartPad** button in the toolbar of the appropriate section.

<input type="checkbox"/>	Relationship	Contact Name	Employer	Title
<input type="checkbox"/>	Wife	Ackerman, Kathleen M.	High Tide Sportswear	Architect
<input type="checkbox"/>	Wife	Ackerman, Kathleen M.	High Tide Sportswear	Architect
<input type="checkbox"/>	Daughter	Ackerman, Marianne		
<input type="checkbox"/>	Son	Ackerman, Kenneth		
<input checked="" type="checkbox"/>	Associate	Halverson, Joe	Mitsubishi Bank	Branch Manager
<input checked="" type="checkbox"/>	Associate	Halverson, Randall C.	Randall Halverson	Physician
<input type="checkbox"/>	Partner	Abernathy, Brad	Nations Life Insurance	Computer Programmer

Figure 5: The Key Relations section of the individual contact record Key Relations tab (with selected contacts and highlighted SmartPad button).

- SmartOffice will launch a Consolidated SmartPad displaying all SmartPad records for the selected contacts.

## Employee Census tab Consolidated SmartPad:

- Open a business record.
- Select the **Employee Census** tab.
- Tag specific contact records or use the **Tag All** option to select all of the contact records.
- Click the **SmartPad** button in the **Employee Census Summary** toolbar.

The screenshot shows the SmartOffice application in a Microsoft Internet Explorer browser window. The address bar displays <https://mysmartoffice.ez-data.com/>. The main content area is titled "ABC Manufacturing" and features a navigation sidebar on the left with options like "Quick Add/Search", "Calendar", "Contact", and "Policy". The central area displays the "Employee Census Summary" for "ABC Manufacturing". A toolbar above the table includes buttons for "Summary", "Business (P)", "Add'l Business Info", "Key Relations", "Employee Census", and "Benefit". The "Employee Census" button is highlighted with a red box. Below the toolbar is a table with the following data:

DOB	Employee Class	Contact Name	Hire Date	Total Salary	Assignm
12/16/1956	Class 1 - Owners, Exec Mgmt.	Antille, Eugene	05/14/1993	85,000	Phillip A Mark Pe Phil's William
09/19/1959	Class 2 - Managers	Ernst, Rosemary	03/15/1995	85,000	Phillip A Mark Pe
02/10/1955	Class 2 - Managers	Hamamoto, Tsuyako	08/04/1998	55,000	Phillip A Mark Pe
11/10/1979	Class 1 - Owners, Exec Mgmt.	Horley, Elan A.	05/14/1993	120,000	Phillip A Mark Pe
10/06/1970	Class 3 - All Others	Johnson, Rochelle	06/20/1998	41,000	Phillip A Mark Pe
03/02/1970	Class 3 - All Others	Porter, Steve	08/14/1999	55,000	Phillip A Mark Pe
01/31/1960	Class 3 - All Others	Riviera, Carlos	07/26/1996	63,000	Phillip A Mark Pe
01/22/1973	Class 3 - All Others	Smith, John	05/21/1999	45,000	Phillip A

Records Shown: 8 Total Records: 8

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Figure 6: The Employee Census Summary (with selected contacts and highlighted SmartPad button).

- SmartOffice will launch a Consolidated SmartPad displaying all SmartPad records for the selected contacts.