Fast·Class File

SmartOffice

Volume Five: Contact Reports

Important contact information such as name, address, phone numbers, policy benefit, investment position, key relationship, and activity history information can be printed easily in a SmartOffice contact report.

If a contact has not been selected –

- Select **Contact** from the main menu and click **Contact Reports**.
- In the **Search** dialogue window, enter criteria to search for the desired contact(s), e.g., **Individual** or **Business**, **Last, First Name**, etc. When search criteria are entered, click **Search**.

- SmartOffice will display a list of contacts meeting the search criteria. Select the contact(s) from the list for whom you would like a contact report or phone list.
- Click **OK**.

- In the **Report** dialogue window, select the desired contact report – **Contact Detail** or **Phone List**.

Note: Other contact reports such as Policy, Investment, and Pending Case Reports can be printed from the Report dialogue window as well.
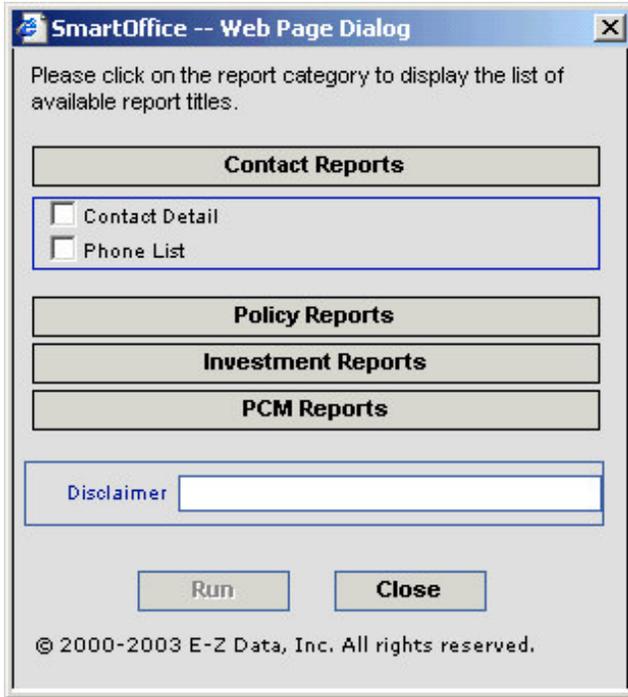
- Once a report selection has been made, click **Run**.
- SmartOffice will display a print preview of the report. The report can be printed using the **Print** button in the toolbar or exported in a variety of file formats using the **Export** button.

If you are viewing a contact record in SmartOffice and would like to generate a contact report for the selected contact –

- Select **Contact** from the main menu and click **Contact Reports**.
- In the **Report** dialogue window, select the desired contact report – **Contact Detail** or **Phone List**.
- Once a report selection has been made, click **Run**.
- SmartOffice will display a print preview of the report. The report can be printed using the **Print** button in the toolbar or exported in a variety of file formats using the **Export** button.

Note: The contact search step is omitted when a contact report is generated while a contact record is in focus.

To generate a **Contact Detail** or **Phone List** report for multiple contacts –

- Select **Contact** from the main menu and click **Contact Reports**.
- In the **Search** dialogue window, specify search criteria for desired contacts using the standard or advanced search options or applying a filter.
- Click **Search**.
- In the resulting list of contacts, tag the contact(s) from the list for whom you would like a contact report or phone list.
- Click **OK**.
- In the Report dialogue window, select the desired contact report – **Contact Detail** or **Phone List**.
- Once a report selection has been made, click **Run**.
- SmartOffice will display a print preview of the report. The report can be printed using the **Print** button in the toolbar or exported in a variety of file formats using the **Export** button.