Fast•Class File

SmartOffice

Volume 12: Record Privatization

In order to mark records as private in SmartOffice, the User Role option **Record Privatization Rights** must be enabled by the SmartOffice administrator.

User Roles/Licenses			
User Role			
Administrator User Roles			
👿 Admin			
Admin - Restricted			
Record Privatization Rights			

Figure 1: The Record Privatization Rights User Role option in Office Settings.

The Following record types can be marked as private in SmartOffice -

Contact records Calendar events Form Letters Letters stored in a contact's Letter Log Documents and images stored in a contact's Document Summary

Records that can be marked as private will have a **Record Privatization** button available on the toolbar. In some cases the **Record Privatization** button will be available by moving the mouse over the **More Features** drop down button on the toolbar.



Figure 2: The Record Privatization button on the To Do toolbar of the DayView Calendar.



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Benefit Letters/Documents	Mass Modify	M	
All Phones	All Addresses	Mass Activity Creation	ER:
	Residence - 321 Long Beach, CA	Record Privacy	C-ut
Mobile - (626) 522-1160	Business - 315 E Huntersville, NC :	Mass Assignment	<u>š</u> sh
		Time Log	0
Business - (310) 273-9873	Business - 1828	Contact Merge	<u>†</u>
Residence - (626) 984-0382 Mobile - (213) 577-0337	Los Angeles, CA Vacation - 24530	Find Contacts with Matching Profile	0
Business - (310) 309-0948#152 Residence - (626) 799-2951	West Hills, CA 91 Business - 144 V	Customer Value	•

Figure 3: The Record Privatization button in the More Features drop down of the Contact summary screen toolbar.

When a user marks a record as private in SmartOffice, only that user will be able to view the private record. Viewing permission may be granted to other SmartOffice users at the time a record is marked as private.

To Mark a record as private in SmartOffice -

- Select the record to be marked as private in SmartOffice by tagging the selected record. Only one record at a time may be marked as private.
- Click the **Record Privatization** button.
- Select the Mark Selected Record as Private option.

SmartOffice Web Pag	ge Dialog
Mark Selected Record a	as Private
Select the following chec Mark Selected Record as	ckbox to mark this record as private. Private
ОК	Close
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Figure 4: The Mark Selected as Private dialogue screen.

 SmartOffice will open an expanded Mark Selected Record as Private screen allowing viewing permission to be granted to SmartOffice users with access to the users records.



Sele N	ct the following checkbox to mark this record as private. Nark Selected Record as Private 🔽			
All users with access to your contacts are listed below. Select iny user(s) you would like to have access to these private ecords. f you do not select anyone, this record will remain visible only				
Ava	ilable Users			
	Adam Cunningham			
	Aaron Johnson			
	Alicia Schmidt —			
	Barry Allen			
	Belinda Young			
	Curt Reynolds			
	Gayleen Wright			
-	Joe Briggs			
	Inza Nelson			
	Inza Nelson			

Figure 5: The expanded Mark Selected as Private dialogue screen.

- If no available users are selected, only the user marking the record as private will be able to view the private record.
- After granting viewing permission, click **OK**.
- The record marked as private will appear with a highlighted background in the record summary screen.



Individual Contact Summary	+ 💎 🗊	🏦 🏈 🖲 🛪	.∎₿∎	罪 闺 관 📬 🖾 🖡 😫 ៷	s ∰ @ »
Summary Personal	Add'l Personal	Household	Key Relations	Benefit Letters/Documents	>>
Contact Name	Туре	Occupation	DOB	All Phones	All Addres
🗖 Adams, Frank	Candidate	Finance	05/29/1968	Residence - (626) 433-0928	Residenc 🔺 3, Glenda
🔲 Adams, Margaret	Client	Real Estate	03/19/1942	Business - (626) 987-7288 Residence Fax - (626) 585-3550 Residence - (626) 962-2032	Business Angeles, Residenc Monterey

Figure 6: Contact record marked as private in the contact Summary screen.

