

# SmartLink for DST

## DATASHEET

Managing, tracking, and reporting on your clients' investment data is critical as you strive to grow your business. But loading investment data for your entire book of business can be a challenging and overwhelming task.

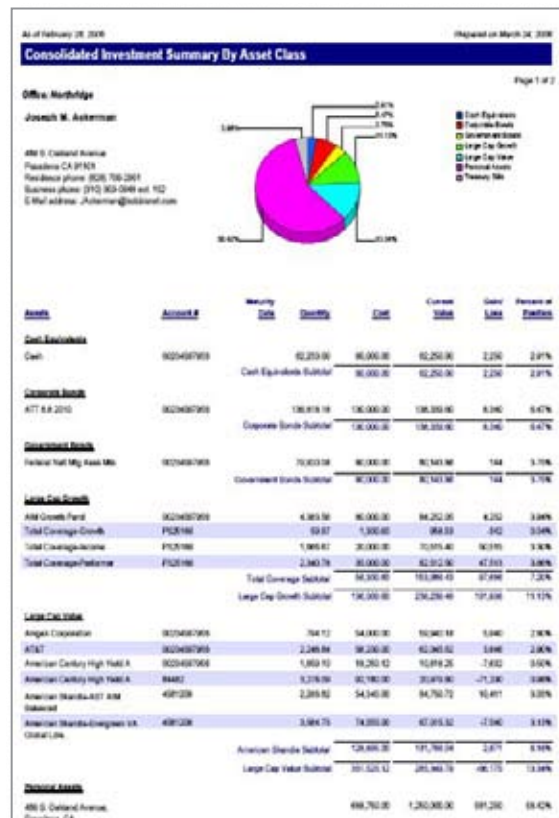
SmartLink for DST, an add-on to E-Z Data's SmartOffice®, gives you control over this process, enabling you to be more effective and productive, and helping you better manage existing clients. As a fully integrated product within the SmartOffice platform, SmartLink for DST interacts seamlessly with the SmartOffice contact management and information management features, giving you the power to load investments information and create a wide variety of valuable reports, including Microsoft® Excel®, Crystal®, and SmartOffice dynamic reports.

## Leverage the power of automated data entry

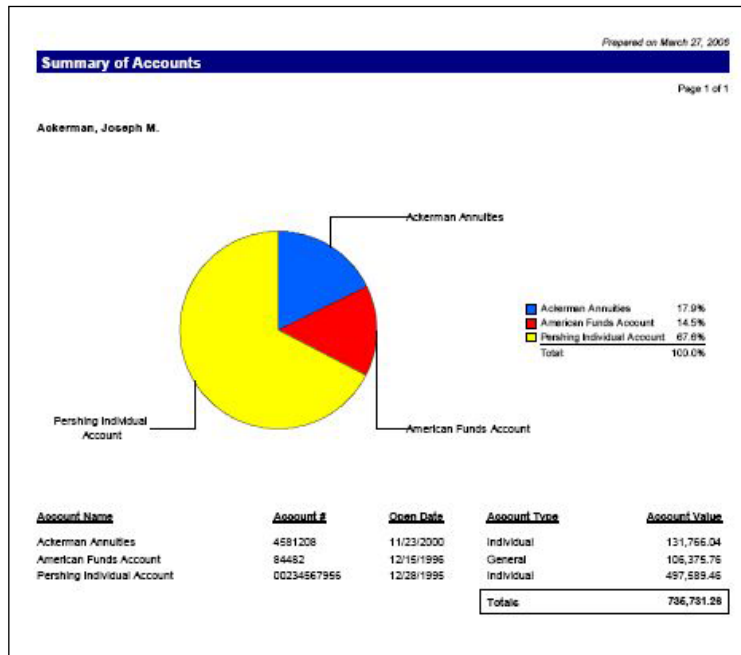
SmartLink for DST gives you the power to upload data files from third-party data providers directly into your SmartOffice database. What does this mean to you? Because the solution handles up to 95% of the day-to-day data entry and updating requirements, you can free up your support personnel to service your clients. And with SmartLink for DST, you'll have access to the most current investment data — so you can deliver an even higher level of value to every one of your clients.

*With easy access to the most current investment information for each client, you can easily prepare detailed investment reports for your clients from your SmartOffice desktop.*

- Gain visibility into the latest investment data for every client (account, position, and transactions)
- Increase your reporting capabilities
- Track and modify investment data from SmartOffice
- Increase productivity by reducing manual data entry



## SmartLink for DST provides these valuable features:



Combine the power of direct DST downloads with SmartInvestments to create graphical account summaries.

- > **Real-time data** — Leverage automatic Internet updates to download the most current policy and investment data.
- > **Seamless integration** — Complete integration with the SmartOffice SmartInvestments module gives you easy access to information, more reporting options, and access to industry-specific features such as Asset Allocation — all to make your job easier.
- > **Powerful reports** — Downloaded data can be used to create powerful, professional investment reports in the format of your choice.
- > **Enhanced error-reporting capabilities** — SmartLink for DST includes a 'processor status report' that provides a comprehensive error log, as well as error details such as total data processed and which items were inserted, updated, and failed.