SmartOffice User Management Roles and Licenses

User Roles

Basic

- **Base SmartOffice:** This is the standard user role and enables access to the basic contact management features of SmartOffice. The access to modules and user rights are controlled by the other options on this tab.
- **SmartView for Advisor:** This role defines a user as a SmartView for Advisor user. This enables very limited functions.
- **eOCS:** Same as the Base SmartOffice user except that the default contact search and summary is the electronic version of the One Card System's Card File. Calendar and activity tracking are also different to accommodate the special needs of eOCS users. The eOCS user has access to special reports and other functions as found under the eOCS side menu.
- **Agency Package:** Enables access to SmartCaseManager, SmartAgency and the base system.

Administrator

- **Users/Licenses Administrator:** Enables license administration in addition to the functions listed for the Access Security Information role.
- **Access Security Information:** Enables modifications of Office Detail, Departmental Hierarchy, Partial Hierarchy, User Creation Default Settings, SmartPad Posting/Contact Data Options, Global Proxy, Group Management, User Roles, Module Access Control, Current User Proxy For, Proxies for Current User, Error Log and Deleted Contacts information. If a user in the System Office is given this role, Office Hierarchy modification is enabled.
- **Enterprise View:** For those organizations that have established an office hierarchy, this enables the user to view offices below the logged in office within that hierarchy.
- **Group Reporting:** Enables the user to select multiple users for reporting. Without this enabled, the user can only run reports for one user at a time.
- **Crystal Report Administrator:** Enables rights to add custom Crystal Reports and set up the custom settings for existing packaged Crystal Reports.
- **DataXchange Enterprise:** Enables access to the DataXchange side menu in order to monitor and control processing as well as run reports and resolve processing errors for DataXchange Enterprise.

E-mail Interface

- **SmartMail:** Enables SmartMail functionality.
- **SmartLink for Outlook:** Enables SmartLink for Outlook. This role cannot be enabled in combination with SmartLink for Lotus Notes.
- **SmartLink for Lotus Notes:** Enables SmartLink for Lotus Notes. This role cannot be enabled in combination with SmartLink for Outlook.

Contact/Calendar Synchronization

- **SmartLink for Outlook Synchronization:** Enables SmartLink synchronization for Microsoft Outlook.
- **SmartLink for Lotus Notes Synchronization:** Enables SmartLink synchronization for Lotus Notes.

Office Setup Options

- **Record Privatization:** Enables the user to privatize records such as Filters, Dynamic Reports, Contact Records, and Activities.
- **Data Import/Export:** Enables rights to both import contact data into the system using the Data Import Wizard and export spreadsheet data using the Export Spreadsheet button located on various spreadsheets throughout SmartOffice. This also controls the ability to export and import Filters and Dynamic Reports.
- **Office-level Spreadsheet Customization:** This enables the user to customize the spreadsheet layout for the entire office.
- **User-level Spreadsheet Customization:** Enables the user to customize the spreadsheet layout for themselves.
- **Custom Screen Prompt Customization:** Enables the user to customize the field labels on custom tabs.
- **Mass Deletion:** Enables the user to delete more than one record at a time within a spreadsheet.
- **Mass Modification:** Enables the user to modify a selected column for more than one record at a time within a spreadsheet. This also includes the Area Code Changes feature.
- **Mass Correspondence:** Enables the right to send correspondence to more than one contact at a time. The Mass Correspondence button displays on applicable spreadsheets and is used to send up to 100 pieces of correspondence simultaneously. To send over 100 pieces of correspondence, select the **Mass Correspondence** option on the **Reporting/Marketing** expanded menu.
- **Mass Activity Creation:** Enables the creation of more than one activity from a spreadsheet.
- **Mass Assignments:** Enables the user to change the assignment for contact, activity, primary advisor and opportunity records.
- **Choice Customization:** Enables the addition and modification of choice values.
- **Form Letter Maintenance:** Enables the ability to add, modify, and delete form letters, labels, envelopes, and templates.
- **Word Track Maintenance:** Enables the ability to add, modify, and delete Word Track scripts.
- **Dynamic Report Maintenance:** Enables the user to add, modify and delete Dynamic Report definitions.
- **Filter Maintenance:** Enables the user to add, modify and delete Filters.
- **Key Relationship Lookup Modification:** Enables the user to modify key relationship lookups.
- **Faxing:** Enables the ability to fax documents.
- **Run Crystal Reports:** Enables the user to run already defined Crystal Reports.
- **Access to Data Validation:** Enables access to the data validation functions.
- **Job Queue Agent Maintenance:** Enables the ability to add, modify, and delete Job Agents.
- **Home Page Customization:** Enables access to the Home Page customization features.
- **Contact Assignments:** Enables assignment of contact records within the proxy list to those contact records that are not directly assigned.

Modules/Licenses

SmartLeads/SmartOpportunities

- **Leads Administrator:** Enables rights to dispatch leads to child offices and to clean up lead data. This is only available from the System Office.
- **Leads Coordinator:** Enables rights to assign, reject and revoke leads as well as run statistic reports for advisors.
- **Leads:** Enables the Leads module rights for the advisor.
- **Opportunity:** Enables the Opportunity module.
- **Opportunity Setup Administrator:** Enables access to administrative setup information.
- **Leads Fulfillment Center:** Enables access to the Leads Fulfillment Center. This is only available from the System Office.

SmartPolicies/SmartInvestments

- **Policy Tracking:** Enables the Policy Tracking module.
- **Group Benefits (Group Policy):** Enables access to the Group Benefits module (Group Policy).
- **Pending Case Management:** Enables access to the Pending Case Management module.
- **Investment Tracking:** Enables access to the Investment Tracking module.
- **Pending Case & Policy Setup Administrator:** Enables Office-level Setup. This includes the capability to modify the Master Requirement List, Setup Requirement Follow-up Days, Status Exclusion, Pending Case Workflow and SmartView for Advisor Privacy defaults. This also enables the Pending Case Setup sub-menu. The Setup menu enables access to the Master Setup List that includes the DataXchange Setup menu and Initial Requirement Load for System Office users. DataXchange Setup allows the creation of DataXchange Registration, GA IDs for GA ID Validation and Auto-Update Exceptions. Access to the HO Pending Case menu is enabled with DX Registration information.
- **Advisor Contract/License Management:** Enables access to the Licensing, Errors & Omissions, Continuing Education, Contracting and Appointment sections of the Advisor module as well as the Setup section in order to manage this information.

Mobile Solutions

- **SmartOffice Mobile for PC:** Enables SmartOffice Mobile for PC.
- **SmartOffice Mobile for PDA:** Enables SmartOffice Mobile for PDA.

SmartWholesaler

- **Wholesaler Setup Administrator:** Enables the administrative setup functions for the Wholesaler module.
- **Wholesaler:** Enables the Wholesaler module.

SmartCommissions

- **CTM Administrator:** Enables access to all functions of the commission tracking system. This license includes carrier postings of commission checks, validation of what was received, what was expected and all reporting functionality and special utilities that are used to Mass Modify commission records.
- **CTM House View:** Enables full viewing access to all levels of payment in the hierarchy chain.
- **CTM Supervisor View:** Similar to the description given for the CTM Advisor View, this enables access to commission records for the advisor and supervisor levels.
- **CTM Advisor View:** Not to be confused with the SmartView for Advisor product, this role restricts how much commission data a person in the office can view over and above the access the user may already have to specific advisors within SmartOffice. CTM allows for a variety of levels of payment. The hierarchy begins at the advisor and rolls through all supervisors up to the house level. The CTM Advisor view enables only the viewing of commission records at the advisor level. Supervisor and house transactions will not be available for viewing.
- **CTM Base:** Enables access to contract setup and rate setup, and provides the ability to import commission data from insurance carriers for the purpose of reporting on the data only.

SmartRecruiting

- **Recruiter Setup Administrator:** Adds everything that the Recruiter license adds and enables access to the Setup menu item.
- **Recruiter:** Adds the Recruitment Tracking side menu. This enables access to the Candidate/Recruit summary and detail information and the Recruiting Activity Management (RAM) Reports.

SmartSeminars

- **Seminar Tracking:** Enables the Seminar Tracking module.

SmartSurveys

- **Survey Setup Administrator:** Adds the Survey Setup side menu and enables the ability to create, administer and analyze published surveys.
- **Survey User:** Adds the Survey Setup Search menu item and enables the ability to link surveys to contact records.
- **Table Extension Functionality:** Enables the ability to link surveys to contact records using the Table Extension button.

DataXchange Online Services

- **Process HO Pending Case Status Information:** Enables access to the HO Pending Case menu items.
- **Carrier Update Pack:** Enables the Carrier Update Pack functions.

SmartWorkflow

- **WFM Administrator:** Enables the administrative functions of the WorkFlow Management module.
- **WFM User (Read-only):** Enables read-only access to the WorkFlow Management module.

Call Center

- **Call Center Administrator:** Enables the administrative functions of the Call Center.
- **Call Center Supervisor:** Enables the supervisory functions of the Call Center.
- **Call Center User:** Enables the Call Center functions.

Integration

- **DXO Adapter:** Enables DXO Adapter integration.
- **Financial Profiles+:** Enables Financial Profiles+ integration.
- **Google:** Launches the Google search engine.
- **Intellisys:** Enables Intellisys integration.
- **LaserApp:** Enables LaserApp integration.
- **Voice Mail Integration:** Enables Voice Mail Integration functions.
- **Albridge:** Enables synchronization of accounts and positions with Albridge.
- **PaperClip**: Enables PaperClip integration.