



Getting Started Guide

Version 5



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About This Guide

Welcome to SmartOffice® Online – the most powerful Customer Relationship Management solution in the insurance and financial services industry!

The information contained in this guide should address many of the questions you have as you begin using SmartOffice Online. Please read the entire guide and contact your SmartOffice Online administrator for questions or clarification on the information presented.

Implementation Overview

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Now, let's get started!



Step 1: Ensuring Hardware and Software Requirements are Met

To ensure acceptable performance of SmartOffice Online whether you're in the office or on the road, the following hardware and software requirements must be met or exceeded: These requirements are based on a combination of software design and field performance tests. Computers configured to exceed these minimum requirements may further enhance the overall performance of SmartOffice Online.

Hardware Requirements

- Pentium III 600Mhz (or equivalent) processor
- 128MB RAM (256MB preferred)
- 56Kbps dial-up connection (cable modem, DSL or other broadband connection preferred)

Software Requirements

- Microsoft Internet Explorer version 6.0
- Windows 2000 or XP
- Microsoft Word 2000 or 2002 required for Word interface
(Microsoft Word 97 is compatible at this time; however, no further development/testing is being conducted on this version--as is.)
- Microsoft Outlook 2003 required for Outlook interface
- Adobe Reader® version 6 (needed for viewing and printing the PDF files produced by SmartOffice). Click here for a free download:
<http://www.adobe.com/products/acrobat/readermain.html>.

Step 2: Logging in to SmartOffice Online the First Time

1. When the SmartOffice Online Administrator creates your account, an e-mail containing the login URL, Office Name, User Name, and Password will be sent to you automatically. Click on the link contained in the e-mail to access SmartOffice Online.
2. From the Login screen, enter your **Office Name**, **User Name**, and **Password**.

Note: Click “Remember Me” to have your Office Name and User Name filled in automatically on future logins. For security reasons, you will still need to enter your password.



Figure 1: SmartOffice Login Screen

3. Click **Login** and the **Change Password** screen displays prompting you to enter a permanent password.

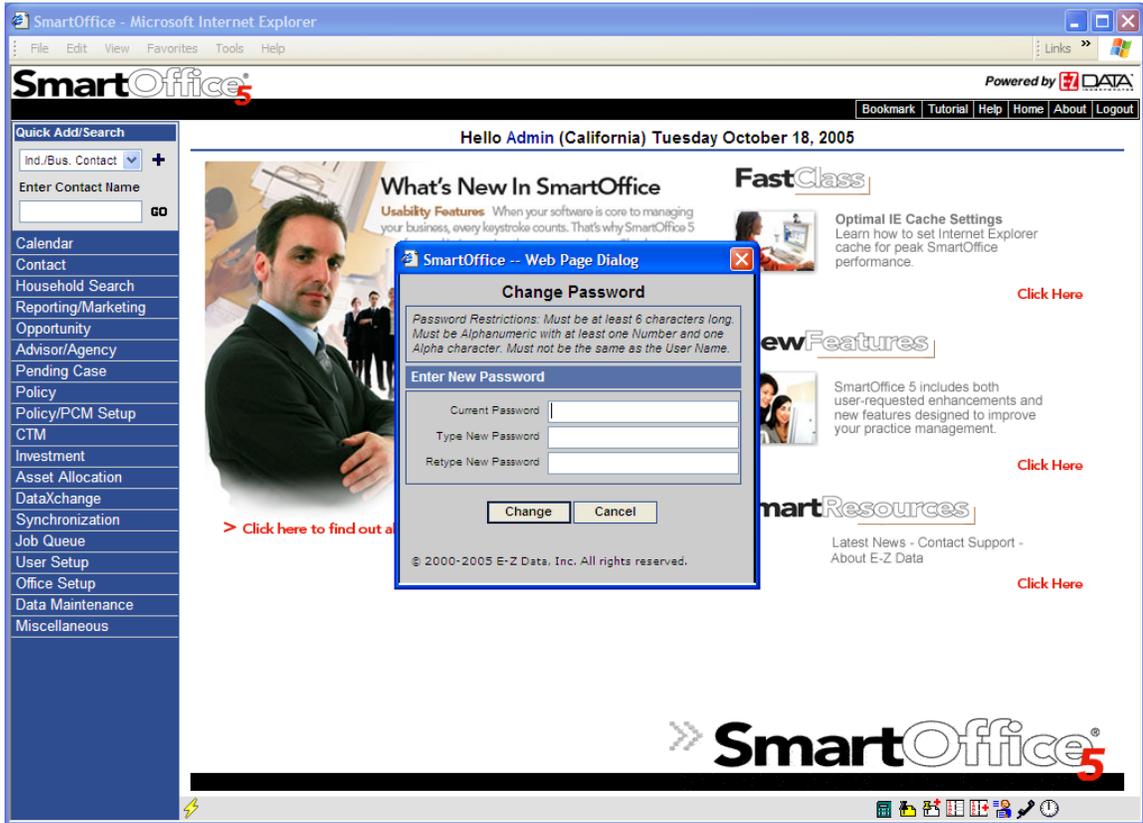


Figure 2: Change Password screen

4. In the “Current Password” field, enter the password contained in the e-mail then press Tab.
5. Enter your new password and press Tab. Retype your new password and click **Change**.
6. When prompted, select your time zone and click **OK**.

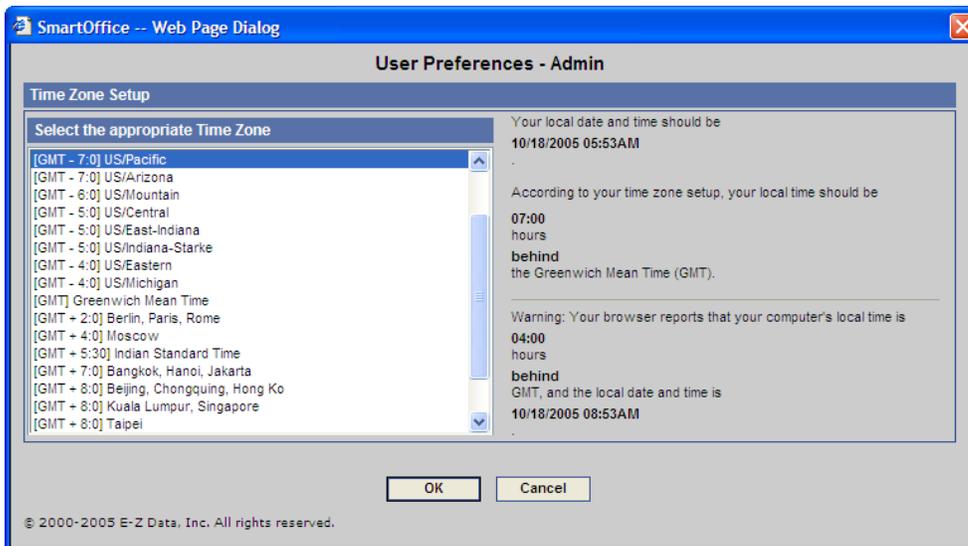


Figure 3: Time Zone Setup Screen

7. The SmartOffice Home page will display as show below.

Note: The options displayed on the side menu vary according to your security level and module assignments. Your options may appear substantially different than those displayed on the screen below.



Figure 4: SmartOffice Home Page

Step 3: Adding SmartOffice Online to Your Favorites List

After you have logged in to SmartOffice Online the first time, you can add it to your Favorites list for quick access the next time you log in.

1. From the SmartOffice Online home page, click **Favorites** in the Internet toolbar (top of the screen).
2. Click **Add to Favorites**.
3. In the Add Favorites screen, SmartOffice will be entered by default. You may change the name or leave it as is. Click **OK**.

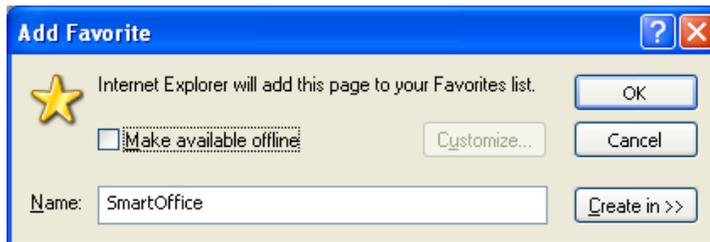


Figure 5: Add Favorite

4. The next time you want to log in to SmartOffice, simply launch Internet Explorer, click Favorites, and select SmartOffice.

Step 4: Logging out of SmartOffice Online

1. To logout of SmartOffice Online, click Logout in the top, right toolbar.



Figure 6: SmartOffice Online Home Page

2. When prompted to logout, click **Yes**.



Figure 7: Logging out of SmartOffice

3. The SmartOffice login screen will display as show below indicating that you have successfully logged out of SmartOffice.



Figure 8: SmartOffice Login Screen

Step 5: Logging in to SmartOffice (after the first time)

1. To login to SmartOffice Online, launch Internet Explorer.
2. If you have saved SmartOffice as a Favorite, click **Favorites** then select SmartOffice from the Favorites list. If you have not saved SmartOffice as a Favorite, enter your SmartOffice URL. If you are unsure of the URL, check with your SmartOffice Online administrator.
3. The SmartOffice Online home page displays, prompting you for your Office Name, User Name, and Password.



Figure 9: SmartOffice Login Screen

4. Enter your Office Name, User Name and Password and click **Login**.
5. Remember, click “Remember Me” to have SmartOffice remember your Office Name and User Name at the next login. For security purposes, you will still be prompted for your password.

Step 6: Configuring and Using SmartMail for Outlook

The SmartMail for Outlook interface allows you to post Outlook e-mail messages, both sent and received, to the SmartPad (notepad) of the appropriate contact record(s) in SmartOffice Online. No more cutting and pasting e-mail text!

Note: *This feature works with Microsoft Outlook 2003 and above only. It will not work with other e-mail programs such as Outlook Express, Lotus Notes, Eudora, etc. If you have not yet configured Outlook to send and receive e-mail, contact your Internet Service Provider (ISP) or your company's IT support team, whichever is appropriate.*

Preparing to Use SmartMail

1. To ensure the proper operation of this feature, Microsoft Outlook must be installed and configured correctly on your computer and be designated as the default mail program. To check this, from SmartOffice Online (or other Web-based program), click Tools, then Internet Options. Click the Programs tab and ensure that Microsoft Office Outlook appears in the E-mail drop-down menu. Click Apply then OK.
2. You must be assigned the "SmartMail for Outlook" User role to use this feature. Note that only an admin user can change this setting: From the main menu, click User Setup then User Management.
3. From the User Search Options dialog box, enter your User Name and click Search.
4. With your user record selected, click on the User Roles/Licenses tab.
5. On the left side, in the User Role section, scroll down until you see the E-Mail Interface section. Check the box to the left of "SmartMail for Outlook" option.

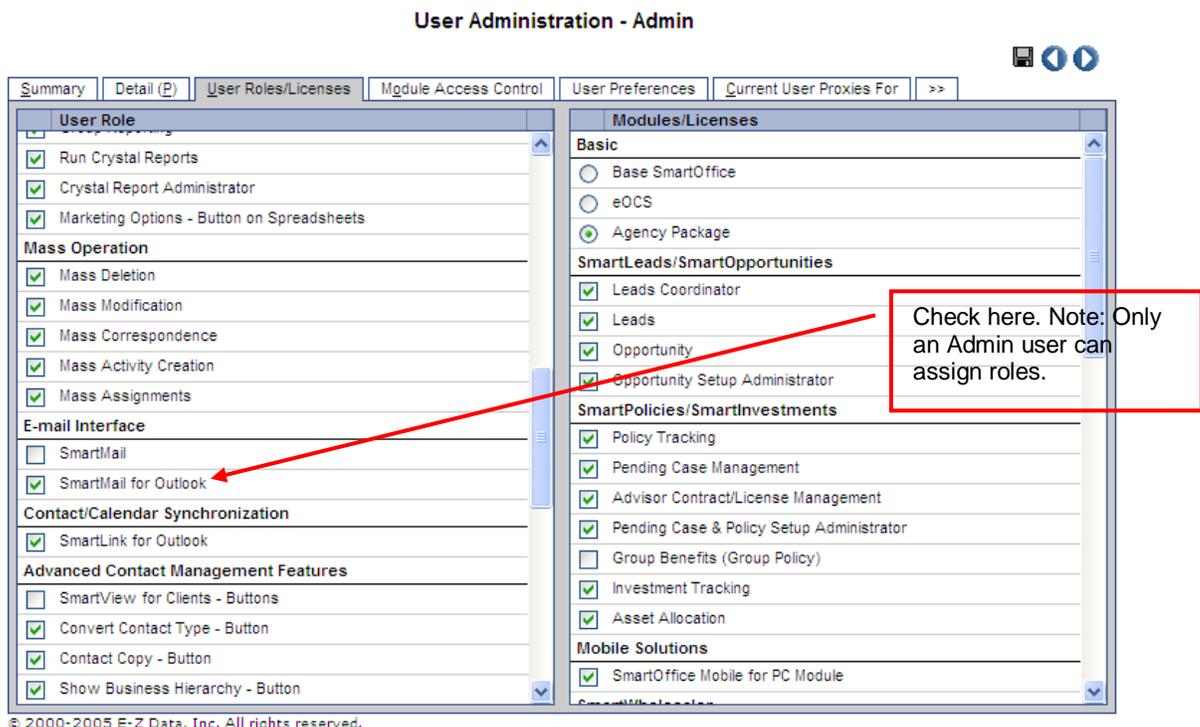


Figure 10: User Roles/Licenses tab

Installing SmartMail for Outlook

1. To install the SmartMail for Outlook interface, click **User Setup** then **Installations** from the side menu.
2. Click **SmartMail for Outlook**.

Installations	
Download	Description
SmartOffice Mobile	Enables synchronization of SmartOffice data with a notebook PC.
SmartLink for Outlook	Enables SmartOffice contacts and activities to synchronize with Microsoft Outlook.
SmartLink for Word	Enables SmartOffice to import and export documents to and from Microsoft Word.
SmartScanner	Enables a scanner interface. Allows embedding of scanned documents.
SmartDialer	If using a modem or network telephony system, allows phone numbers to be dialed directly from SmartOffice.
SmartLink for Spreadsheet Export	Enables SmartOffice to export spreadsheet data in Comma Separated Values, Tab Separated Values, and XML formats into the Browser, Notepad, Microsoft Excel and Microsoft Word applications.
SmartLink for Excel Reports	Enables SmartOffice to export report data to Microsoft Excel.
SmartMail for Outlook	Enables SmartOffice to use Microsoft Outlook for sending e-mail messages and posting them to the SmartPad.
Adobe Acrobat Reader Site	Downloads Adobe Reader, used for printing spreadsheets and reports.
Download SmartOffice Static Content	Downloads static pages into cache. Makes SmartOffice run faster.
Download Crystal Reports Viewer	Downloads Crystal Reports Viewer, used to display and print reports available on the Crystal Server.
SmartLink for Windows Explorer	Enables the posting of files from Windows Explorer to various areas of SmartOffice.

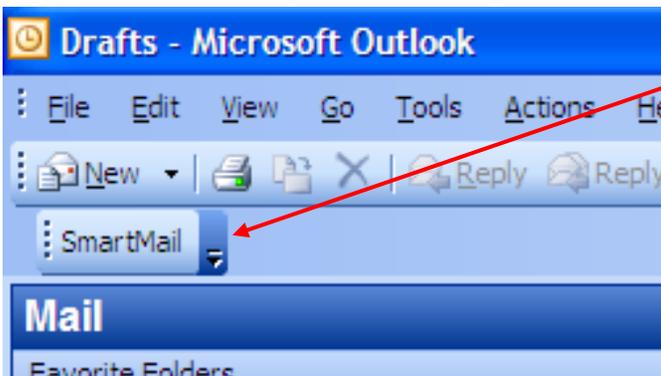


Click here.

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Figure 11: Installations Menu

3. The installation will take place in the background and will happen very quickly.



To verify that the installation was successful, open Outlook and look for the **SmartMail** button on the Toolbar.

You may need to log out then log back in to Windows before the button will display.

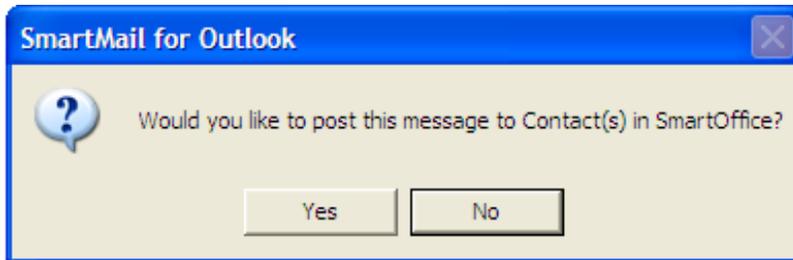
Figure 12: SmartMail Button from within Outlook

Sending and Posting Messages from Within SmartOffice Online

There are two ways to send an e-mail from within SmartOffice Online. Each is described below.

Using the E-mail Link from the Contact Record

1. Go to the appropriate contact's Personal tab and click on their e-mail address.
2. The standard Outlook message window will display with the contact's e-mail address in the "To" field. Compose your message and when finished, click **Send**.
3. You will be prompted to post this message to one or more contacts in SmartOffice Online.



4. Click **Yes**.
5. The following message will display (if you have not applied the Windows security patches, this message will not display):



6. Check the "Allow access for" box and select the desired time period.
7. Click **Yes** to allow SmartOffice Online to access Outlook.
8. A window displays prompting you to select the contacts whose SmartPads will be updated with the content of this message.

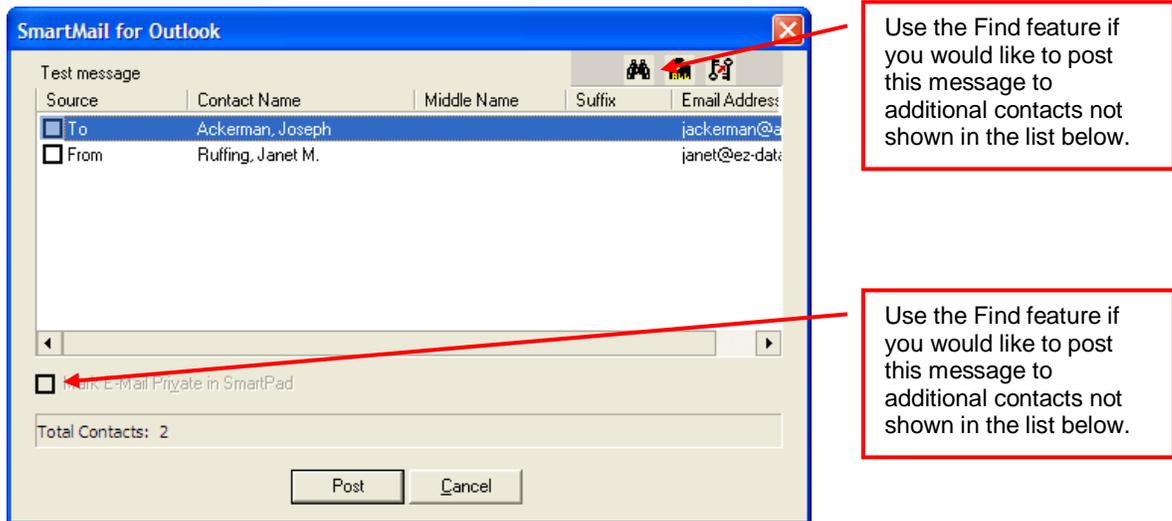


Figure 13: Outlook E-Mail Interface Screen

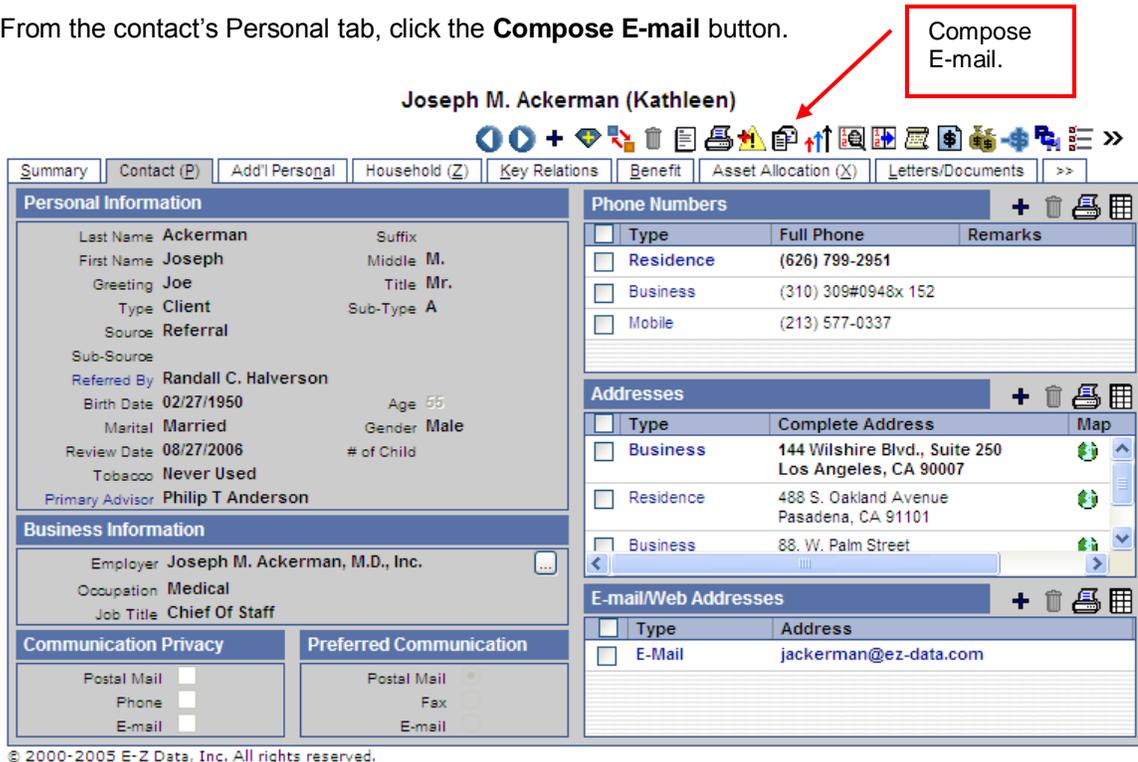
9. Click in the box to the left of each contact whose SmartPad you would like to update with the contents of this e-mail. Click **Post**. The message will be sent via Outlook and posted to each selected contact's SmartPad.

Note: *When you are logged in to SmartOffice Online and create an e-mail from within Outlook, you will still be prompted to post the message to one or more contacts in SmartOffice Online. Follow the steps outlined above.*

Using the Compose E-mail Feature

The Compose E-mail feature gives you some additional flexibility when sending e-mail messages. Using this feature, you may send a message to other users in your office *regarding* the current contact and have it posted to the contact's SmartPad.

1. From the contact's Personal tab, click the **Compose E-mail** button.



Joseph M. Ackerman (Kathleen)

Summary | Contact (P) | Add'l Personal | Household (Z) | Key Relations | Benefit | Asset Allocation (X) | Letters/Documents >>

Personal Information		Phone Numbers	
Last Name	Ackerman	Type	Full Phone
First Name	Joseph	<input type="checkbox"/> Residence	(626) 799-2951
Greeting	Joe	<input type="checkbox"/> Business	(310) 309#0948x 152
Type	Client	<input type="checkbox"/> Mobile	(213) 577-0337
Source	Referral		
Sub-Source			
Referred By	Randall C. Halverson	Addresses	
Birth Date	02/27/1950	Type	Complete Address
Age	55	<input type="checkbox"/> Business	144 Wilshire Blvd., Suite 250 Los Angeles, CA 90007
Marital	Married	<input type="checkbox"/> Residence	488 S. Oakland Avenue Pasadena, CA 91101
Review Date	08/27/2006	<input type="checkbox"/> Business	88. W. Palm Street
Tobacco	Never Used		
Primary Advisor	Philip T Anderson	E-mail/Web Addresses	
		Type	Address
		<input type="checkbox"/> E-Mail	jackerman@ez-data.com

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Figure 14: Contact record: Personal Tab

2. The Compose Mail Options screen displays. Refer to the screen below for instructions on completing the screen.

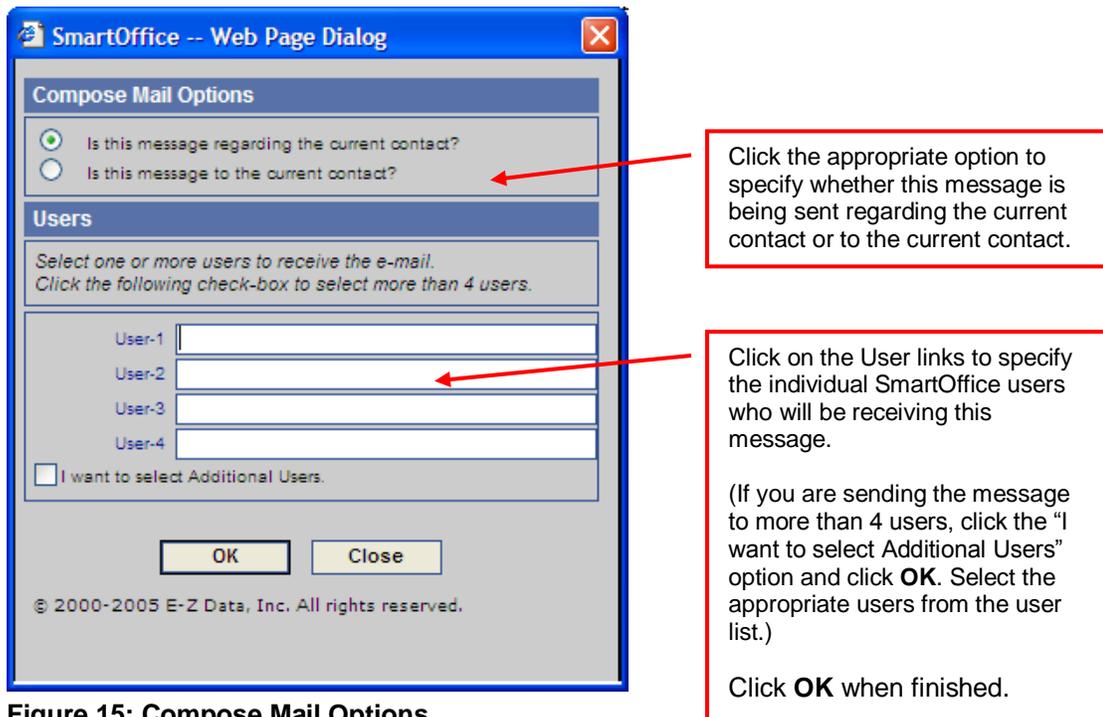


Figure 15: Compose Mail Options

3. The standard Outlook message window will display with the appropriate e-mail address(es) in the "To" field. Compose your message and when finished, click **Send**.
4. Follow steps 3 through 9 starting on page 11.

Posting Previously Sent/Received Messages

To post an e-mail that was sent or received previously via Outlook, follow these steps:

1. Log in to SmartOffice Online.
2. Log in to Outlook and highlight the message you would like to post.
3. Click the **SmartMail** button and you will be prompted to select the contacts whose SmartPads should be updated with the contents of this message.
4. Select the appropriate contact(s) from the list and/or using the Find feature.
5. Click in the box to the left of each contact whose SmartPad you would like to update with the contents of this e-mail.
6. Click **Post**. The e-mail will be posted to each selected contact's SmartPad.

Step 7: Specifying your User Preferences

1. When your SmartOffice Online administrator created your account they were prompted to specify your user preferences. To review or make changes to these preferences, from the SmartOffice Online home page, click **User Setup** then **User Preferences**.

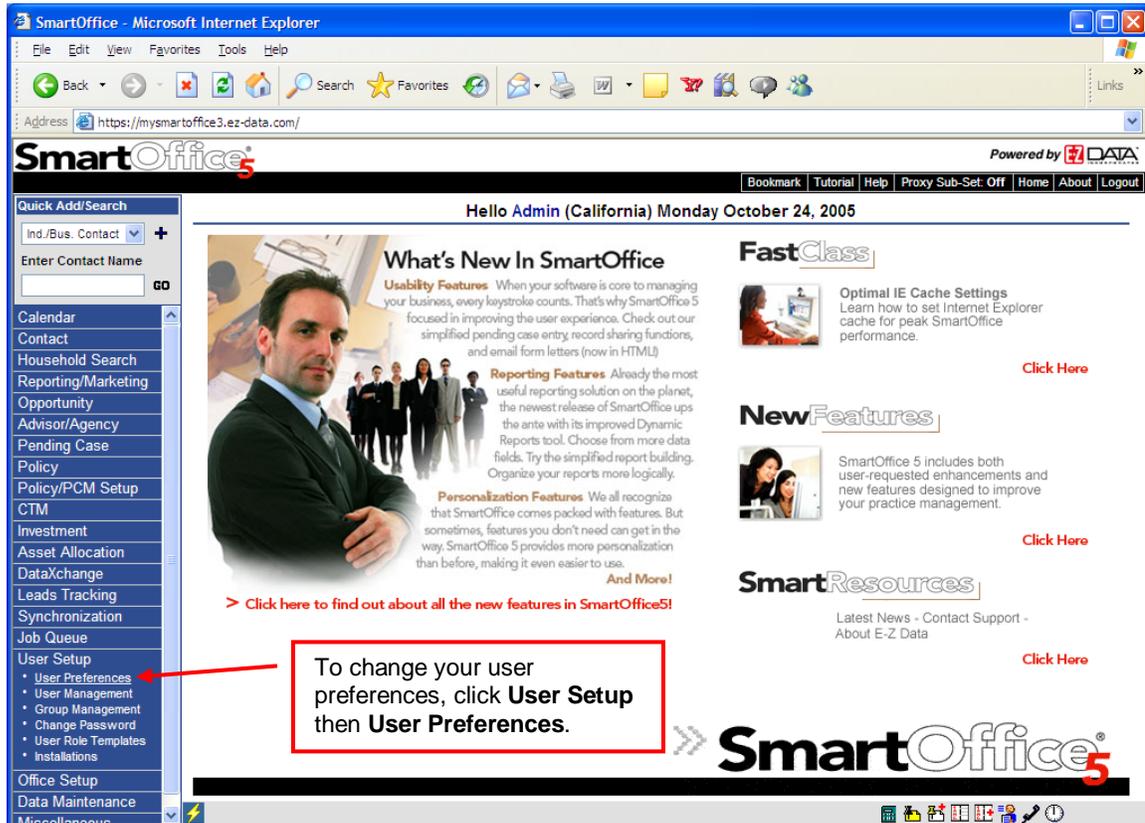
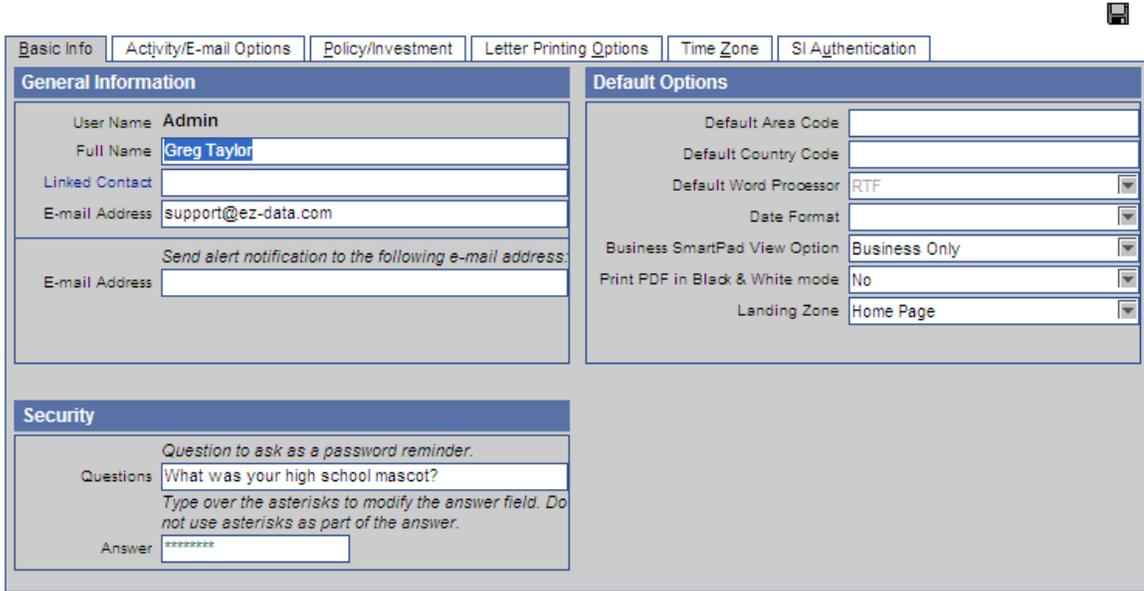


Figure 16: Accessing User Preferences

2. The Basic Info screen displays which contains general user information, a password reminder question (in the event you forget your password), and miscellaneous options. Refer to the information below to complete this screen.

Basic Info Tab

User Preferences - Greg Taylor



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Figure 17: User Preferences – Basic Information Tab

General Information

The only item in the General Information section that has not been previously completed is the E-mail address (for alert notifications).

E-mail Address (for alert notifications)

SmartOffice send alerts to users for a variety of reasons (e.g., when someone else creates an activity for the user, when the user is responsible for the print queue and a job is added, etc.). Enter the E-mail address where this user would prefer to receive these notifications.

Security

SmartOffice is equipped with a password reminder feature. In this section, a user can enter a question as well as the corresponding answer. If the user forgets their password, SmartOffice will ask this question. If the question is answered correctly, SmartOffice will generate a new password and send it to the user's e-mail address specified in the user's **General Information** section. The Question and Answer fields should be completed by the user following their initial login.

Default Options

Default Area Code and Default Country Code

The values entered in these fields will be automatically added to phone numbers as new records are added to the system. Enter a 1 in the Default Country Code field for the United States.

Default Word Processor

Accept the default of RTF in the Default Word Processor field.

**Date Format**

If you want to use a date format that is different than the format set for the office, use the drop down arrow to select the desired date format for system fields.

Business SmartPad View Option

When viewing the SmartPad for a Business record, you may choose to display SmartPad entries for the Business record only, for the Business record and its associated Key Relations (e.g., partners in the business, attorneys, CPAs, or other people who are associated with this business), for the Business record and the linked Primary Contact, or for the Key Relations of the business only.

Print PDF in Black & White mode

Specify whether you would like to print SmartOffice-generated PDF files in black & white or in color.

Landing Zone

Instead of displaying the SmartOffice Online home page upon login, you may specify a different "landing zone." From the dropdown list, select the page you would like displayed upon login.

Activity/E-mail Options Tab

1. Click on the Activity/E-mail Options tab to access the Activity, Calendar, Activity Automove, E-mail, and Signature options.

User Preferences - Greg Taylor




Basic Info	Activity/E-mail Options	Policy/Investment	Letter Printing Options	Time Zone	SI Authentication
----------------------------	---	-----------------------------------	---	---------------------------	-----------------------------------

Activity Preferences

- Check for Activity Collision
- Disable default activity tracking for new activities
- Do not prompt for Activity Confirmation Letter
- Do not navigate to the Contact Detail Page on Phone Dial
- Assume all calls are outgoing
- Do not show Phone List while using the Dial button.

Activity AutoMove Options

Maximum days in past to move or display activities:

Activity types to be moved forward

- Call
- Project
- To Do
- Appointment

Calendar Options

Call Outcome Workflow Option:

DayView Time Interval:

Reminder Before Call:

Reminder Before Appt:

E-mail Options

- Use SmartMail as default mail client
- Save Sent Messages

Signature

<H> A A↕ B I U T ↻ 📄 📧 ABC

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Figure 18: User Preferences – Activity/E-mail Options Tab

2. Refer to the information below to complete this screen.

Activity Preferences

Check for Activity Collision

If you would like to be alerted when scheduling a timed activity that conflicts with a previously scheduled timed activity, select the Check for Activity Collision option.

Disable default activity tracking for new activities

When you mark an activity as finished in SmartOffice, you will be prompted to note the outcome of the activity (e.g., contact not made, call rescheduled, sale made, etc.). This feature is called Activity Tracking and is controlled by the “Tracked” field in the Activity Detail screen.

If you would like to have your activities tracked by default leave this box *unchecked*.

Do not prompt for Activity Confirmation Letter

To have SmartOffice automatically prompt you to print an activity confirmation letter each time you create a timed activity, leave this box *unchecked*.

Do not navigate to the Contact Detail Page on Phone Dial

SmartOffice has an auto-dialer feature that can automatically dial a contact’s phone number (requires modem that interfaces with your telephone) or simply track outgoing and incoming calls if you do not use a modem.

If you would like to display the Contact Detail screen (instead of the calendar or other screen from which you use the auto-dialer) when using the SmartOffice auto-dialer, leave this box *unchecked*.

Assume all calls are outgoing

If you only track outgoing calls, check this box. This saves you a step when using the auto-dialer, because you will not be prompted to specify whether a call is outgoing or incoming.

Do not show Phone List while using the Dial button

If you do not have a modem hooked up or otherwise cannot place a call using the auto-dialer, but you would still like to time and track the call, check this box.

Calendar Options

Call Outcome Workflow Option

Based upon your selection in this field, when a tracked activity is marked as “Done” in the calendar, you will be presented with either a Simplified or Comprehensive Activity Outcome Wizard (both are shown below).

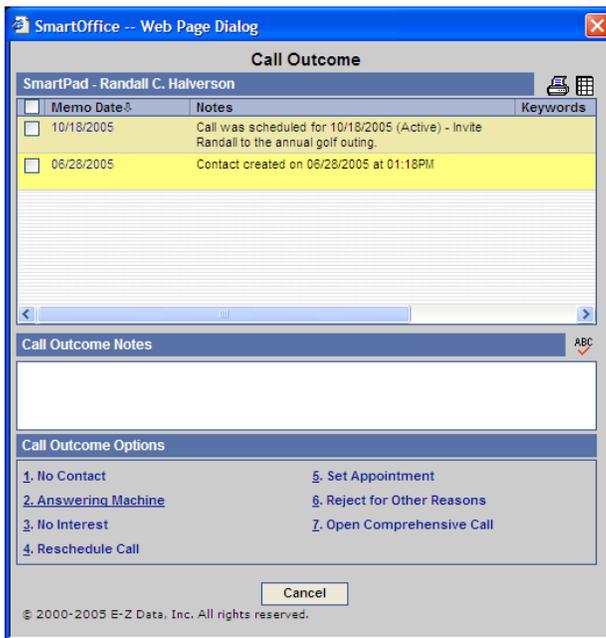


Figure 19: Simplified Call Outcome Wizard

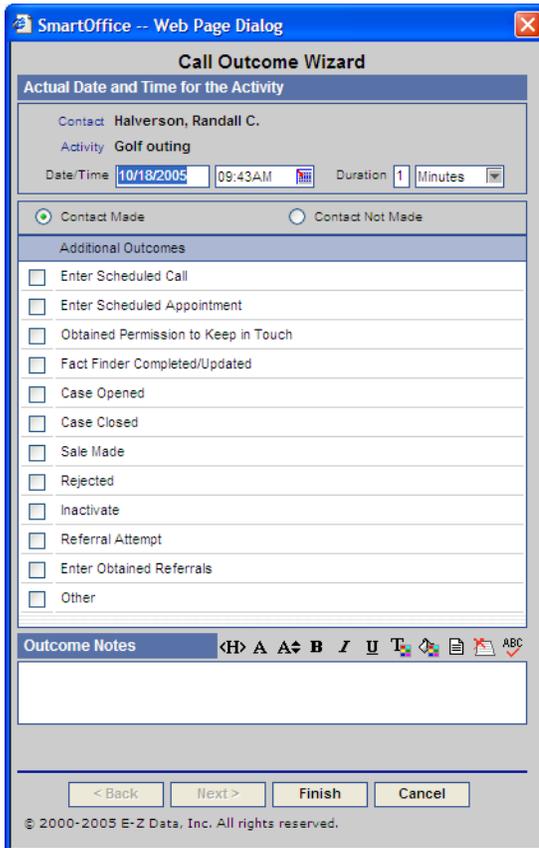


Figure 20: Comprehensive Call Outcome Wizard

DayView Time Interval

The times on the SmartOffice Online calendar may be shown in 10, 15, 30, or 60-minute intervals.

Reminder Before Call/Reminder before Appointment

SmartOffice will display a reminder before timed calls or appointments. Select the amount of time prior to the activity that you would like to be notified.

Activity Automove Options

SmartOffice will move forward unfinished past activities to the current day's calendar based upon the entries in this section.

Maximum days in the past to move or display activities

Specify how many days in the past you would like SmartOffice to look for unfinished activities. Any unfinished activities during this interval (that meet the criteria specified below) will be moved forward to today's calendar. Enter a number that cover times when you are on vacation. We recommend 30 days.

Activity types to be moved forward

This is where you can specify the activity types to be moved forward. Generally, you would restrict your selection to only those activity types without an associated time (i.e., call, project, to-do). Appointments are usually timed or scheduled events and would normally be rescheduled or cancelled as opposed to being moved forward.

E-mail Options

The following options will be grayed out if you are not assigned a SmartMail user role. If you use Outlook as your mail client, skip to the Policy/Investment Tab section.

Use SmartMail as default mail client

If you are using a POP3 e-mail client, you can send and receive messages via SmartOffice using the SmartMail feature. Click here to make SmartMail your default mail client.

Save Sent messages

Click here to have SmartOffice save a copy of each message sent using SmartMail.

Signature

Enter the user's signature line as it should appear on sent e-mail messages.

- When finished completing the entries in the User Preferences section, click the Save icon in the upper right corner of the screen.

Policy/Investment Tab

- Click the Policy/Investment Tab to access policy and investment defaults. Note: If you have not been given a module license for Policies, Group Policies, and/or Investments, you will not see this screen or it will be missing some components.

User Preferences - Greg Taylor



Basic Info	Activity/E-mail Options	Policy/Investment	Letter Printing Options	Time Zone	SI Authentication			
<p><i>You can control 'individual policy' types displayed by SmartOffice by selecting them from the list below.</i></p> <p>Show Policy Types  </p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Life <input checked="" type="checkbox"/> DI <input checked="" type="checkbox"/> Annuity <input checked="" type="checkbox"/> LTC <input checked="" type="checkbox"/> Medical <input checked="" type="checkbox"/> Homeowner <input checked="" type="checkbox"/> Auto <input checked="" type="checkbox"/> Umbrella <input checked="" type="checkbox"/> Other 			<p><i>You can control 'group policy' types displayed by SmartOffice by selecting them from the list below.</i></p> <p>Show Group Policy Types  </p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Group Medical <input checked="" type="checkbox"/> Group Dental <input checked="" type="checkbox"/> Group Vision <input checked="" type="checkbox"/> Group LTC <input checked="" type="checkbox"/> LTD <input checked="" type="checkbox"/> STD <input checked="" type="checkbox"/> Retirement <input checked="" type="checkbox"/> Group Life <input checked="" type="checkbox"/> A D & D <input checked="" type="checkbox"/> Travel <input checked="" type="checkbox"/> Section 125 			<p><i>You can control investment types displayed by SmartOffice by selecting them from the list below.</i></p> <p>Show Investment Types  </p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Mutual Funds <input checked="" type="checkbox"/> Stocks <input checked="" type="checkbox"/> Bonds <input checked="" type="checkbox"/> Cash and Equivalents <input checked="" type="checkbox"/> Fixed Annuities <input checked="" type="checkbox"/> Variable Annuities <input checked="" type="checkbox"/> Unit Investment Trusts <input checked="" type="checkbox"/> Direct Participation Programs <input checked="" type="checkbox"/> Miscellaneous <input checked="" type="checkbox"/> Bank Account <input checked="" type="checkbox"/> Personal Property <input checked="" type="checkbox"/> Notes Receivable <input checked="" type="checkbox"/> Real Estate 		

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Figure 21: User Preferences – Policy and Investment Tab

- Place a checkmark next to each policy and/or investment type you would like displayed in SmartOffice.
- When finished, click the Save icon in the upper right corner of the screen.

Letter Printing Options Tab

1. Click the Letter Printing Options tab to specify your default address, output, envelope, and other letter options.

User Preferences - Greg Taylor



Basic Info	Activity/E-mail Options	Policy/Investment	Letter Printing Options	Time Zone	SI Authentication
----------------------------	---	-----------------------------------	---	---------------------------	-----------------------------------

Select the appropriate options as a default 'Letter Printing Option' for the current User. In case of an automatic Workflow, these options will be used to print letters. These options can be overridden at run-time.

<p>Address Options</p> <p><input checked="" type="radio"/> Preferred Address</p> <p><input type="radio"/> Residence Address</p> <p><input type="radio"/> Business Address</p> <hr/> <p>Letters/Documents Tab Options</p> <p><input type="radio"/> Display Letters and Documents in single spreadsheet</p> <p><input checked="" type="radio"/> Display Letters and Documents in separate spreadsheets</p> <hr/> <p>Letter Output Media</p> <p><input checked="" type="radio"/> Contact's Preferred Method</p> <p><input type="radio"/> Print Letter</p> <p><input type="radio"/> Send as e-mail</p> <p><input checked="" type="radio"/> Print on Local Printer</p> <p><input type="radio"/> Print on Printer Queue</p>	<p>Default Envelope, Header/Footer Options</p> <p>Envelope </p> <p>Header </p> <p>Footer </p> <p>Template </p> <hr/> <p><input type="checkbox"/> Print header on first page only.</p> <p><input type="checkbox"/> Print footer on first page only.</p> <hr/> <p>Letter Printing Options</p> <p><input checked="" type="checkbox"/> Print One Letter per Household</p> <p><input checked="" type="checkbox"/> Apply Contact's Mail Privacy</p> <p><input checked="" type="checkbox"/> Preview before printing</p> <p><input checked="" type="checkbox"/> Post to Letter Log/SmartPad</p> <p><input type="checkbox"/> Create Follow-up Activity</p> <p><input checked="" type="checkbox"/> E-mail Word Document as HTML</p>
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Figure 22: User Preferences – Letter Printing Options Tab

Address Options

You may specify a preferred mailing address for each contact entered in your office (e.g., Residence, Business, Other). If you would normally like to send correspondence to the address listed as the contact's preferred address, click **Preferred Address**. If you would like the address option to default to the contact's Residence or Business Address, check the appropriate box.

Letters/Documents Tab Options

The Letters and Documents tab on the Contact record screen can list letters and documents in one list or it can show the letters and documents in separate lists. Check the appropriate box.

Letter Output Media

You may enter a preferred method of communication for every contact in your office (i.e., postal mail, e-mail, or fax). If you would normally like to send correspondence via the contact's preferred method of communication as indicated in their Contact record, select **Contact's Preferred Method**. If you would like the letter output media to default to letter, e-mail, or fax, check the appropriate box.

If users are responsible for printing their own documents, check **Print on Local Printer**. If you have administrative staff that is responsible for printing the documents of most of the users on your system, check **Print on Printer Queue**. Print jobs will be held stored in the job queue of the



responsible print queue user. This feature allows remote employees to send their print jobs to the main office for printing and mailing purposes.

Default Envelope, Header/Footer Options

If desired, specify an envelope, document header/footer, and letter template as default settings for users creating typewritten correspondence. These options enable you to maintain a consistent look and feel for all contact correspondence.

Click on the appropriate link to select from created documents or to add a document on the fly.

Note: *Envelopes, headers, footers, and letter templates are accessible from the side menu by clicking Office Setup then Form Letters.*

If you would like to print the header and/or footer on the first page only, click the appropriate box.

Letter Printing Options

Use the check boxes to set default letter printing options for all users:

- The **Print One Letter per Household** option will ensure that only one letter will be sent to a household if more than one member of a household is selected when printing mass correspondence. Correspondence will be addressed to the contact specified as the head of household unless a salutation for the household is defined on the contact **Household** tab.
 - The **Apply Contact's Mail Privacy** option will alert a user when a contact has requested not to be contacted via the selected method of correspondence.
 - The **Preview Before Printing** option will automatically launch a print preview before sending the document to the local printer or SmartOffice Online printer queue. This preview will appear in an Adobe Acrobat window.
 - The **Post Letter to Letter Log/SmartPad** option will save all letters and envelopes generated and printed from SmartOffice Online to each selected contact's Letter Log.
 - The **Create Follow-up Activity** option will prompt the user to create a follow-up activity for every letter sent from SmartOffice Online.
 - The **E-mail Word Document as HTML** option will include letter text in the body of the e-mail in HTML format (to preserve formatting) as opposed to sending the document as an attachment.
2. When finished entering the letter printing options, click the Save icon in the upper right corner of the screen.

Time Zone Tab

If you would like to change your time zone, click the Time Zone tab and select the appropriate time zone.

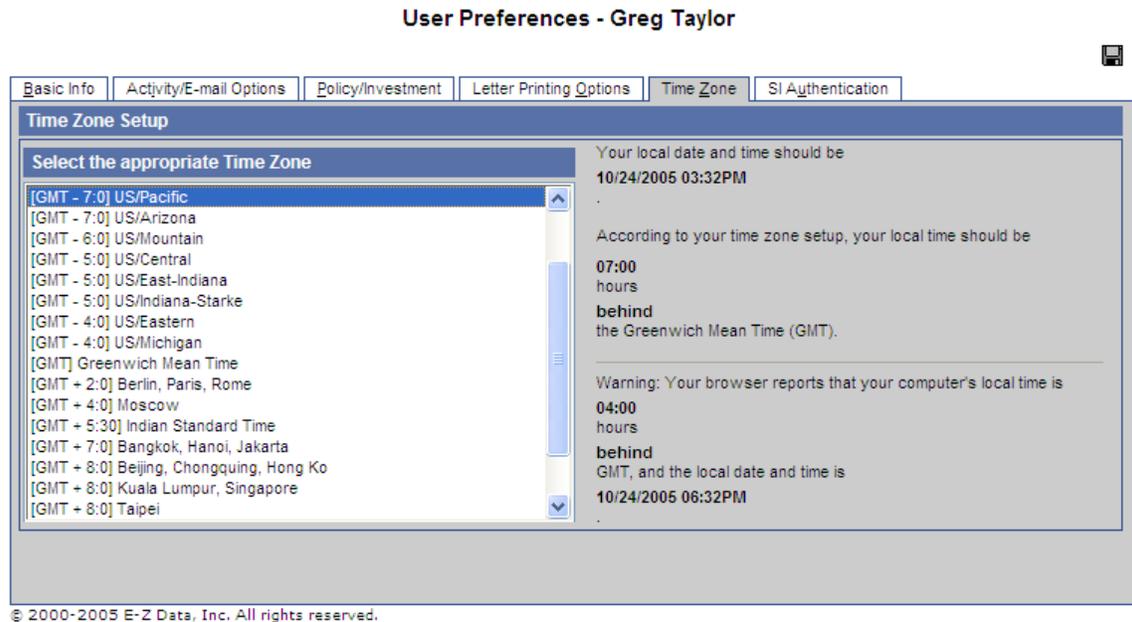


Figure 23: User Preferences – Time Zone Setup Tab



Step 8: Training Options

Successful business people know that even the best tool in the world provides value only if it is used properly.

To reap the rewards of using a tool as robust and broad in scope as SmartOffice Online, careful attention must be given to learning how to properly use the system. The key, of course, is training. Ensuring that you and your staff receive the training needed to effectively perform your job functions is essential.

While it is impossible to apply a cookie cutter approach to developing any training plan, there are certain core system components that all trainees need to be familiar with prior to moving on to more advanced topics. These foundation topics include:

System Introduction: This topic covers how to navigate in the system, access additional resources, select contacts, view data (notes, letters, activities, policies, etc.), and mine data for marketing purposes.

Client File: This topic covers how to use the screens that comprise a contact's record, customize field choices, add contacts to a set, establish key relationships, use advanced selection options, and run contact reports.

Calendar: This topic covers how to navigate through the calendar views, change view preferences, create activities, view other users' activities, create recurring activities, produce activity reports, move unfinished activities forward automatically, and post important dates to the calendar.

Letters: This topic covers how to use Word to create individual letters, form letters, envelopes, and labels, use merge codes to insert database information into letters, produce mass mailings, use templates to save time, and import Word documents.

Filters, Sets, and Dynamic Reports: This topic covers how to select specific records for inclusion in reports and mailings, save selection criteria (filters) for use in reports and sets, create sets of contacts, add and remove set members, create and run dynamic reports, and drop report results into other marketing areas of the system.

More advanced topics and module courses may be added following these core classes to meet the unique needs of your organization.

When Should Training Begin?

You should begin training as soon as your office has been created by E-Z Data and you have completed the office and user setup according to the instructions in this guide.

If you are converting data from another system, training should begin **as soon as you send your data here for the trial conversion**. Once the trial conversion is completed, you will have a 10-day User Acceptance Testing (UAT) period during which you must review the converted data for accuracy and completeness. If you are not comfortable with SmartOffice Online, this will be a very difficult task.

Once you sign off on the UAT, you will resubmit your data for the final conversion. Once converted, the data will be loaded into your SmartOffice Online office and you will begin using the system. By completing training prior to this time, all users will be up and running very quickly.



Training Delivery Methods

Our training delivery methods include online training videos, live Web-based training, and on-site training. Each option is explained in greater detail below.

Online Training Videos

We offer a comprehensive series of online video training courses that are available **at no charge** from our Web site. Unlike other vendors' products, SmartOffice is specifically designed for insurance and financial services professionals so the concepts presented in the classes are relevant and meaningful and can be directly applied to your practice.

Each course is broken down into a series of lessons and "Fast Classes." The lessons cover the fundamentals of the system and the Fast Classes offer training on advanced tools and functionality not covered in the basic lessons. Every other week, a new Fast Class arrives via e-mail and is also posted to our Web site so the information is always fresh!

The lessons and Fast Classes combined provide comprehensive "nuts and bolts" training and make it possible to:

- "Attend" training classes anywhere there is an Internet connection
- View entire classes or just the lessons that you want to view
- See real time examples of SmartOffice functionality
- Train new staff members quickly and easily with no scheduling conflicts
- Take advantage of Fast Class sessions to learn specific SmartOffice functionality

We recommend that you (and your staff members) view *all* the online videos as a prerequisite to using the system or scheduling Web-based or live training. To access these videos, go to the following link:

<http://www.ez-data.com/support/smartoffice.shtml>.

Live Web-Based Sessions

Live Web-based training is a cost-effective, personalized training solution that combines the benefits of interacting with an E-Z Data instructor with the convenience of the Internet.

Web-based training sessions are generally used as a supplement to the online training sessions (or on-site sessions) and often involve module-specific or advanced functionality training. Typically, Web-based training is delivered in 1 to 1½ hour blocks and scheduling is very flexible.

Live Web-based session rates are \$200/hour. Charge applies to preparation time for customized sessions as well for actual instruction time. You may use your company's Web-meeting and audio-conferencing facilities, or E-Z Data's facilities. E-Z Data's Web-meeting and audio-conferencing facilities are limited to 5 attendees plus the instructor.

If you have sufficient Web and audio conferencing facilities, this is an extremely easy and cost-effective way to offer valuable training to your staff.



On-Site Training

An E-Z Data trainer can be sent to your location to conduct a group training session for your staff members. The benefit of this type of training is that all team members can be trained at one time and can benefit from the collaboration and one-on-one interaction that naturally occurs in this type of environment. Because the training takes place in a meeting room or computer lab, the staff members are free from their daily office distractions (phone calls, e-mails, etc.) and can completely focus on the material presented.

E-Z Data instructors bring a wealth of experience and provide lab-based instruction that allows participants to walk through a number of real life scenarios. Through hands-on exercises, course participants develop a significant comfort level with system components and features.

You may also elect to send one or more staff members for training at our Pasadena, California headquarters. One benefit of this approach is that this team will receive more individualized, intensive training than would occur in a larger group. In addition, product experts can be brought in to assist with advanced topics, if necessary. This team would become your in-house E-Z Data solution experts and would be an invaluable resource to the success of your project.

On-site training rates are \$1500/day, \$600 travel day fee, airfare, hotel, meals, and other expenses.

For more information or to schedule a training session, contact Marlon Urias, Manager, Training Services at (626) 585-3505 ext. 7312 or marlon@ez-data.com.



Step 9: Getting Technical Support Assistance

First line support is provided by your office's SmartOffice Online administrator. If you have a question or encounter a problem, please contact your administrator first. If they cannot assist you, the administrator will contact our support staff.

Additional Resources

- Comprehensive online video training classes are available **at no charge** from our Web site. Type www.ez-data.com then go to the Training & Support page (or click the following link: <http://www.ez-data.com/support/smartoffice.shtml>). Additional product and support related information is also available from our Web site.
- As part of your SmartOffice Online subscription, you will receive a “Fast Class” movie every other week. These movies are generally ten minutes or under in length and spotlight various features of the system.
- For immediate assistance, try our robust online help system. Simply click the Help hyperlink shown at the top of system screens to launch a context-sensitive help menu. No need to stop your work to open a manual!

Thank you for purchasing SmartOffice Online! We value your business and look forward to helping you put the power of SmartOffice Online to work in your practice.