

SmartLink for Intellisys  
User Guide

# SmartOffice<sup>®</sup>



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## Introduction

This guide outlines the use of the Intellisys (ExamOne) Integration module for SmartOffice® Online (SOO) version 3.5.9 and higher. The integration of this application involves being able to view a contact's existing documents that are linked at the Intellisys (ExamOne) Web site from SmartOffice Online. This module is available as a separate add-on to SmartOffice Online. For information on purchasing the Intellisys (ExamOne) Integration module, please contact the E-Z Data Sales Department, [www.ez-data.com](http://www.ez-data.com). For more information on the Intellisys (ExamOne) application, please visit [www.examone.com](http://www.examone.com). For information on the Azalea bar code font please visit [www.azelea.com](http://www.azelea.com).

## Requirements for the Intellisys Integration

- A User Name and Password to the Intellisys Web site
- SmartOffice Online v3.5.9 or higher
- SmartCaseManager license
- The Azalea Bar code font C128
- Intellisys integration rights

## Using the Intellisys Integration

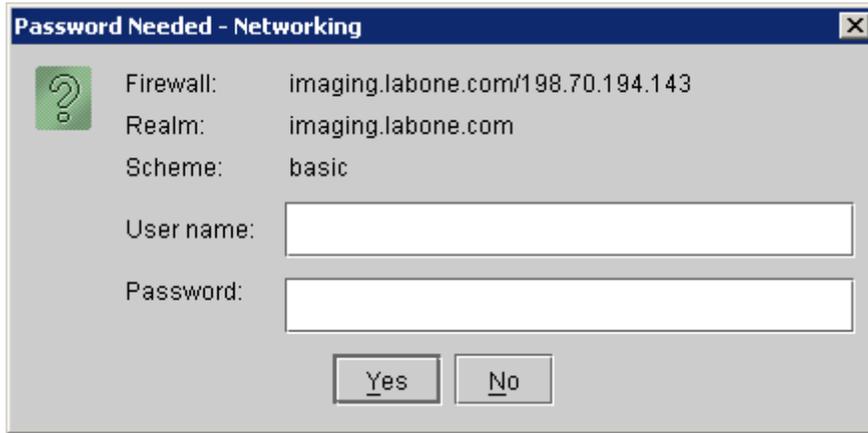
1. From the SmartOffice Pending Case Summary or Detail tab, click the **Intellisys** button.



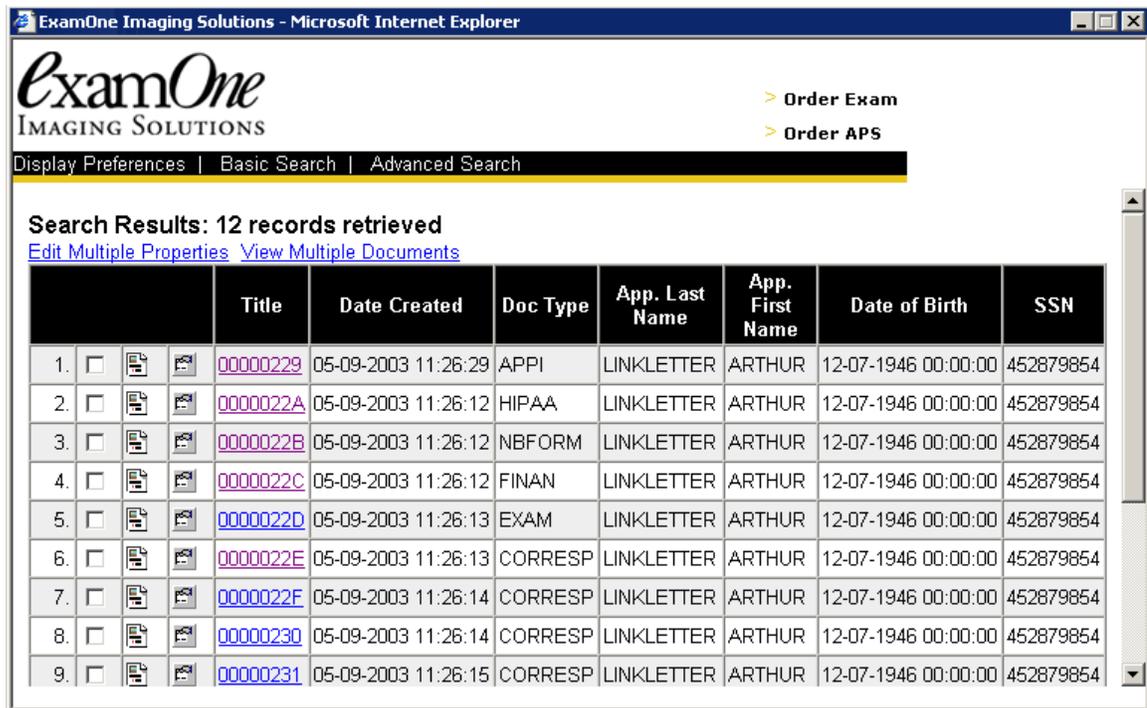
2. Enter the Intellisys User Name and Password and then click the **OK** button.

A screenshot of a Windows-style dialog box titled "Enter Network Password". The dialog has a blue title bar with a question mark icon and a close button. The main area is light gray and contains a key icon on the left. The text "Please type your user name and password." is centered. Below this, there are two labels: "Site:" and "Realm:", both with the value "imaging.labone.com" entered. There are two text input fields: "User Name" and "Password". At the bottom left, there is a checkbox labeled "Save this password in your password list" which is currently unchecked. At the bottom right, there are two buttons: "OK" and "Cancel".

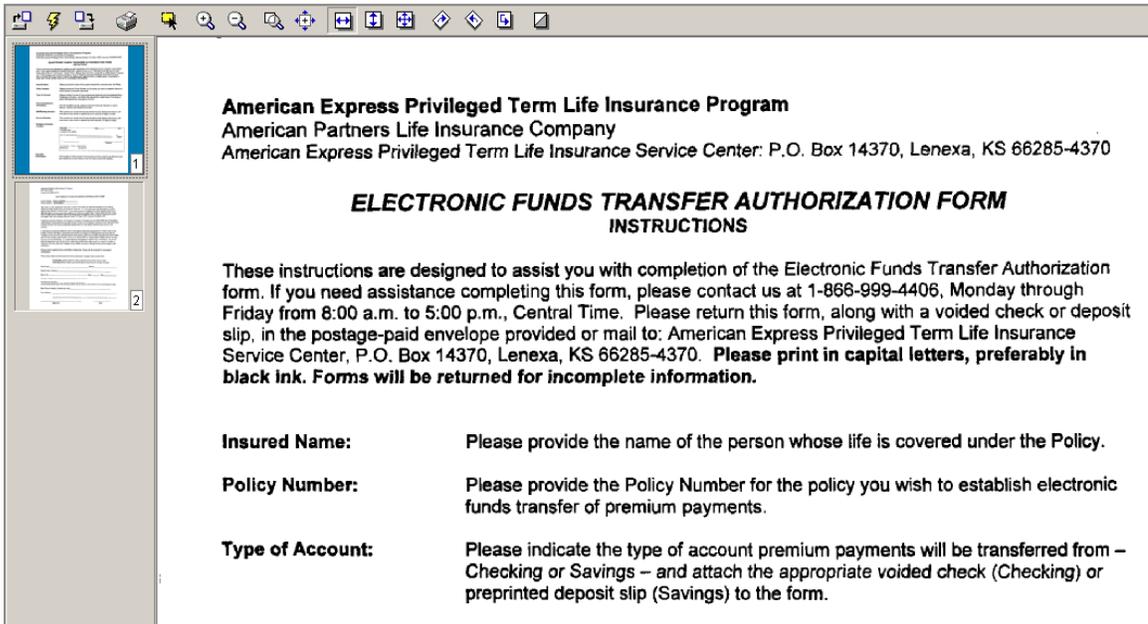
- Enter the User Name and Password when prompted. If prompted to download a file/software/security certificate from Intellisys (ExamOne), please do so in order to display the files that are stored on their site.



- Based upon the Pending Case case ID or Unique case ID, the user will be taken to the document storage for that particular contact/case ID.



5. Click on a Title hyperlink to display the corresponding information.



The screenshot shows a web browser window with a toolbar at the top. The main content area displays the following information:

**American Express Privileged Term Life Insurance Program**  
American Partners Life Insurance Company  
American Express Privileged Term Life Insurance Service Center: P.O. Box 14370, Lenexa, KS 66285-4370

***ELECTRONIC FUNDS TRANSFER AUTHORIZATION FORM***  
***INSTRUCTIONS***

These instructions are designed to assist you with completion of the Electronic Funds Transfer Authorization form. If you need assistance completing this form, please contact us at 1-866-999-4406, Monday through Friday from 8:00 a.m. to 5:00 p.m., Central Time. Please return this form, along with a voided check or deposit slip, in the postage-paid envelope provided or mail to: American Express Privileged Term Life Insurance Service Center, P.O. Box 14370, Lenexa, KS 66285-4370. **Please print in capital letters, preferably in black ink. Forms will be returned for incomplete information.**

**Insured Name:** Please provide the name of the person whose life is covered under the Policy.

**Policy Number:** Please provide the Policy Number for the policy you wish to establish electronic funds transfer of premium payments.

**Type of Account:** Please indicate the type of account premium payments will be transferred from – Checking or Savings – and attach the appropriate voided check (Checking) or preprinted deposit slip (Savings) to the form.