SmartLink for Intellisys
User Guide

SmartOffice®

918 E. Green Street

Pasadena, CA 91106

Web: http://www.ez-data.com

Telephone: (626) 585-3505

Fax: (626) 440-9097

U.S. toll-free fax: (800) 779-3123

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. For more information on the Intellisys (ExamOne) application, please visit www.examone.com. For information on the Azalea bar code font please visit 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.

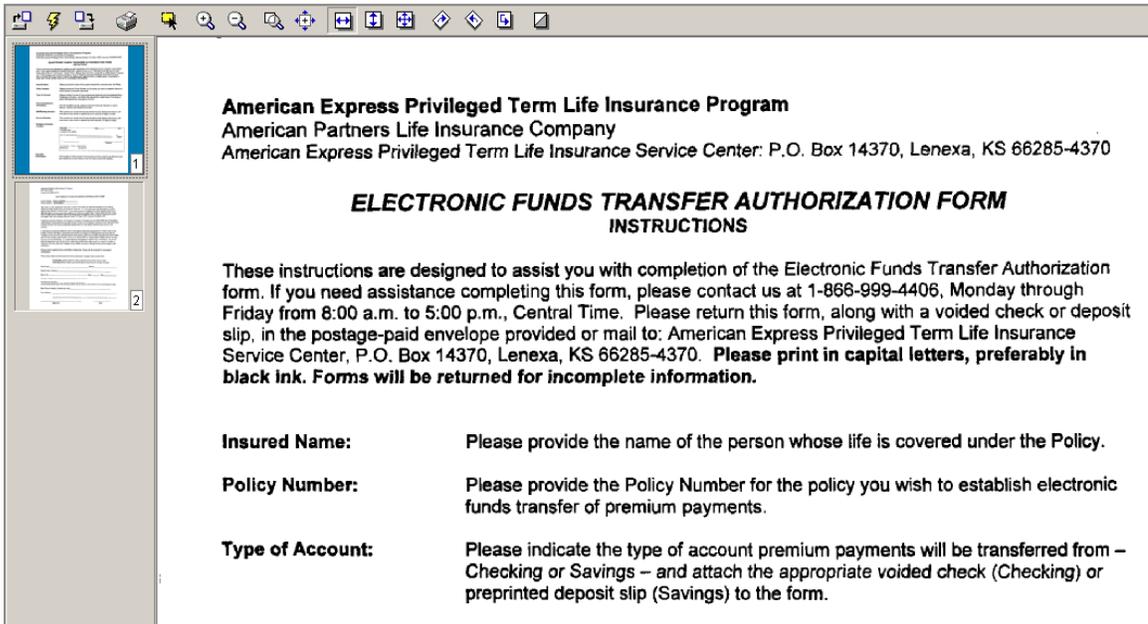2. Enter the Intellisys User Name and Password and then click the **OK** button.

3. 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.
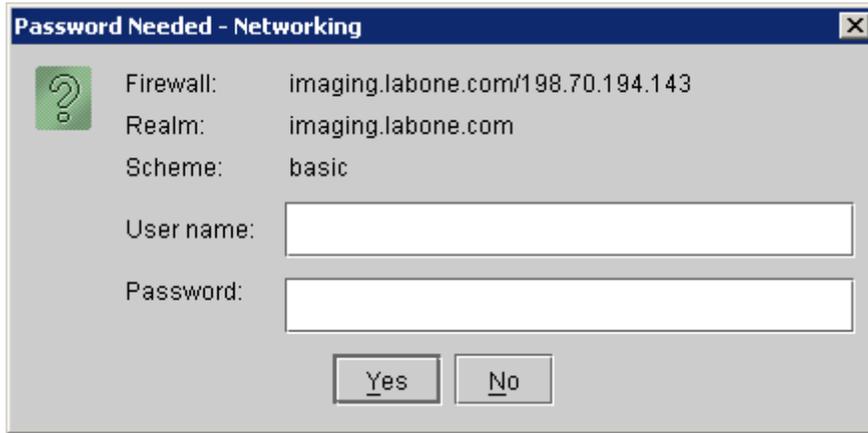
4. Based upon the Pending Case case ID or Unique case ID, the user will be taken to the document storage for that particular contact/case ID.
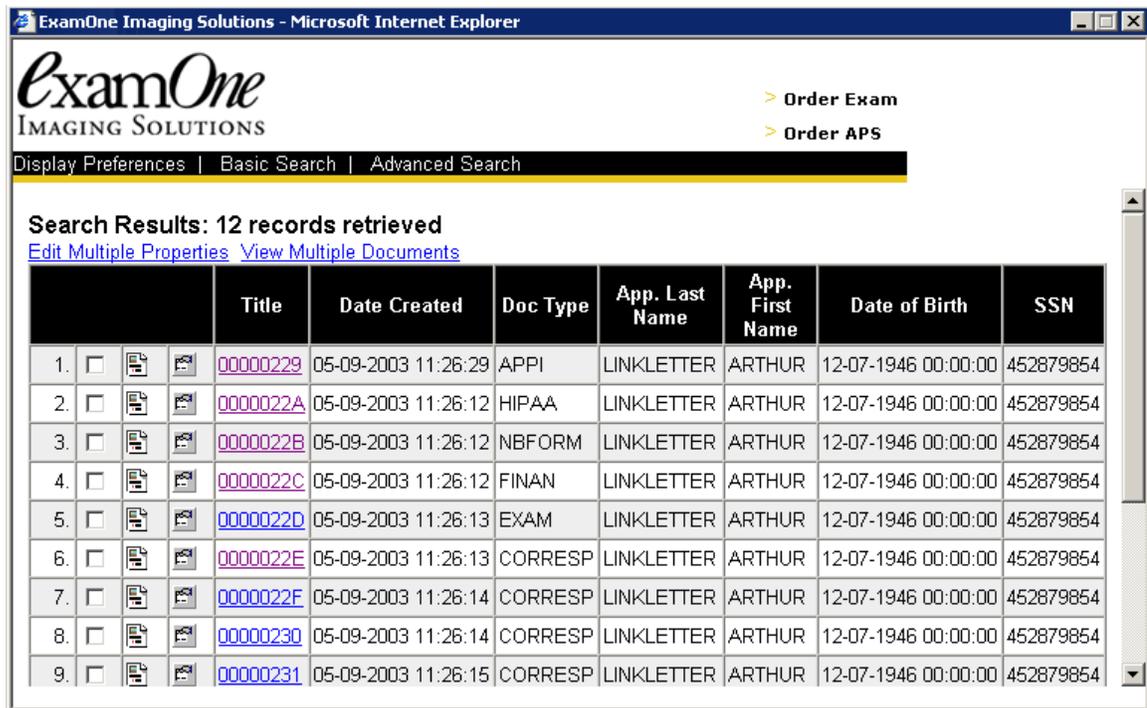
5. Click on a Title hyperlink to display the corresponding information.