

SmartLink for Labels  
User Guide

# SmartOffice®



Copyright 1998-2006, E-Z Data, Inc.

All Rights Reserved.

No part of this documentation may be copied, reproduced, or translated in any form without the prior written consent of E-Z Data, Inc.

All product names are trademarks of their respective manufacturers or organizations.



918 E. Green Street

Pasadena, CA 91106

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

Telephone: (626) 585-3505

Fax: (626) 585-3523

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

# Table of Contents

Introduction .....	1
Installation of the SmartLink for Labels Adapter.....	1
Overview .....	2
Requirements for SmartLink for Labels.....	2
Installation of the SmartLink for Labels .....	2
Running the Installation Program .....	2
SmartLink for Labels Workflow .....	3
Single Label Printing for Contacts and Advisors.....	3
Single Label Printing from Policy and Pending Case.....	4



# Introduction

This comprehensive guide is intended for both System Administrators, who will deploy the adapter, and end users interested in using the SmartLink for Labels. The first section of this guide is not intended for the end user, it requires access to administrative functions of the system. It describes the installation of the actual adapter, an action that needs to be performed once per server. End users can skip this first section and proceed directly to the Overview section. The Overview section explains how the SmartLink for Labels is used to perform single label printing with a Dymo® device.

## Installation of the SmartLink for Labels Adapter

The following section is intended for the SmartOffice System Administrator who will be installing the SmartLink for Labels adapter.

To allow SmartOffice users' access to SmartLink for Labels, the adapter must first be installed and enabled in the System office (site access). Prior to attempting to install the adapter, save a copy of the latest **SmartLink-Labels.zip** file on an accessible drive and log into the System office as a user with administrator rights.

1. Select **SI Adapter** from the expanded **Interfaces** menu to open the Adapter Search dialog box.
2. Select the **Search** button to display the Adapter Summary.
3. Click the **Install** button to install the SmartLink for Labels adapter.
4. The Adapter Installation Wizard dialog box opens.
5. Select the **Select the package file from your local system** option, click the **Browse** button to locate the **SmartLink-Labels.zip** file, and then click the **Next** button.
6. On the next screen of the Adapter Installation Wizard, verify that the License Type is set to **Site** and then click the **Next** button.
7. On the next screen of the Adapter Installation Wizard, verify that the Adapter Accessibility section has options selected for the areas to be supported on the server. Currently SmartLink for Labels supports functionality for contacts, advisors, policies, and pending cases.
8. On the next screen of the Adapter Installation Wizard, nothing needs to be changed or modified; click the **Next** button.
9. On the next screen of the Adapter Installation Wizard, nothing needs to be changed or modified; click the **Finish** button.
10. A confirmation dialog box will open and advise that the adapter has been installed successfully. Click the **OK** button to close this dialog box.

The remainder of this document is intended for the user who will be using SmartLink for Labels to generate labels.

## Overview

SmartLink for Labels enables a user to tag the appropriate record from any of the following modules.

- Contact
- Advisor
- Pending Case
- Policy

Once you have tagged a record, click the SmartLink for Labels button to print a single label. You can select the appropriate address (the default address appears in bold) and whether or not to print spousal information, if applicable. The appropriate data will display in the Dymo program and one or more copies of the same label can be printed using the Dymo software. For more information on Dymo single label printers, visit [www.dymo.com](http://www.dymo.com).

## Requirements for SmartLink for Labels

- Dymo label software version 7.2.2.3 or higher. Note that SmartLink for Labels has been tested with version 7.2.2.3 but it may work with other versions.
- SmartOffice 5.1 or higher
- Install SmartLink for Labels

## Installation of the SmartLink for Labels

The Dymo label software must be installed prior to attempting the installation of the SmartLink for Labels software. If Dymo software is not installed, the SmartLink for Labels installation will not continue. Because the SmartLink for Labels adapter was installed with a Site License, no additional license is required for a user to access this button.

1. Select **Installations** from the expanded **User Setup** menu to display the Installations spreadsheet.
2. Select the **SmartLink for Labels** hyperlink to begin the program installation.

## Running the Installation Program

When prompted to install the program, read all prompts and select the appropriate option for each step.

1. The first dialog box prompts to **Install SmartLink for Labels?** Select the **Yes** button.
2. The next dialog box displays **Do you want to run or save this file?** The file name is **SmartLink4Labels.exe**.
  - Select the **Run** button to install the program from the Internet. (Recommended)
  - The program can be saved and processed later by selecting the **Save** button and saving the file to an accessible drive.

Note that these instructions assume that the **Run** button was selected.

3. The next dialog box prompts **Do you want to run this software?** Select the **Run** button to run SmartLink for Labels.
4. A SmartLink for Labels - InstallShield Wizard dialog box opens and begins processing. Note that if one or more browser windows are open, you will be prompted to close these windows before the installation program can continue.
5. The wizard continues; select the **Next** button.

6. The SmartLink for Labels - InstallShield Wizard dialog box continues processing. From the InstallShield Wizard Complete dialog box, select the **Finish** button.

Congratulations! SmartLink for Labels is installed and you are ready to print labels using your Dymo single label printer.

## SmartLink for Labels Workflow

After installing SmartLink for Labels, you can now print labels one at a time for contacts. The SmartLink for Labels button appears in various modules within SmartOffice.

- When accessed from a contact or advisor:
  1. The Dymo program is opened.
  2. The SmartLink for Labels dialog box opens for you to select either the preferred address (displayed in bold) or another address to send to the Dymo program.
  3. Prior to sending the address to the Dymo program, the spousal information can be included, if applicable.
  4. Once the appropriate selections are made, the following information will be included on the label for the selected contact record.

Format	Example
Title First and Last Name	Mr. and Mrs. John Smith
Street Address Line 1	1234 Main Street
Address Line 2 if any	Pasadena, CA 91106
Address Line 3 if any	
City, State ZIP Code	

- When a policy or pending case record is selected:
  1. You are first presented with a list of Interested Parties for the policy or pending case.
  2. After the appropriate contact is selected, the workflow is the same as that for selecting a contact.

## Single Label Printing for Contacts and Advisors

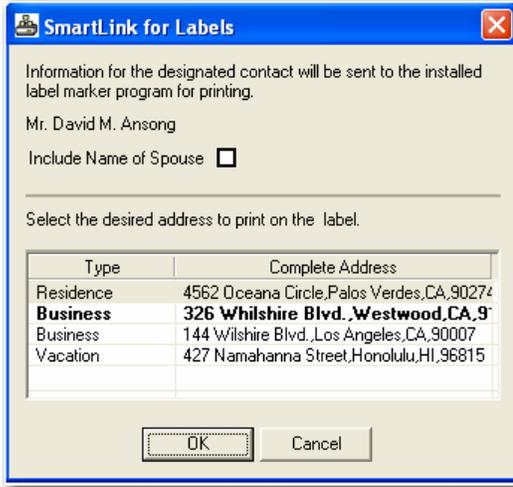
In the Contact and Advisor Summaries, and on the Detail tabs of both of these modules, the SmartLink for Labels button is displayed.

### To Create a Label for a Contact or Advisor

1. After selecting a record, click the **SmartLink for Labels** button.
2. The File Download dialog box opens with the following options:
  - **Open** – Opens SmartLink for Labels with the contact information transferred to the Dymo program.
  - **Save** – Saves the **solabel.elb** file to the specified directory on your computer.
  - **Cancel** – Cancels the process.

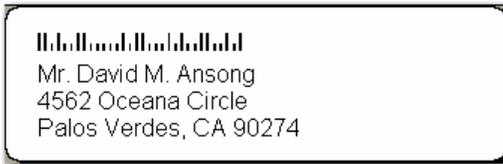
**Tip:** Clear the **Always ask Before Opening this File** option if you do not want to display this dialog box in the future.

- Click the **Open** button to open the Dymo program and then the SmartLink for Labels dialog box, which displays any available addresses for this contact.



Note that the default address is in bold.

- To include spousal information in the label, select the **Include Name of Spouse** option.
- After selecting the appropriate mailing address, click the **OK** button.
- The address (as shown below) will display in the Dymo program; one or more copies of a single label can be printed.



## Single Label Printing from Policy and Pending Case

In the Policy or Pending Case Summary spreadsheets, and on the Detail tabs of both of these modules, the SmartLink for Labels button is displayed.

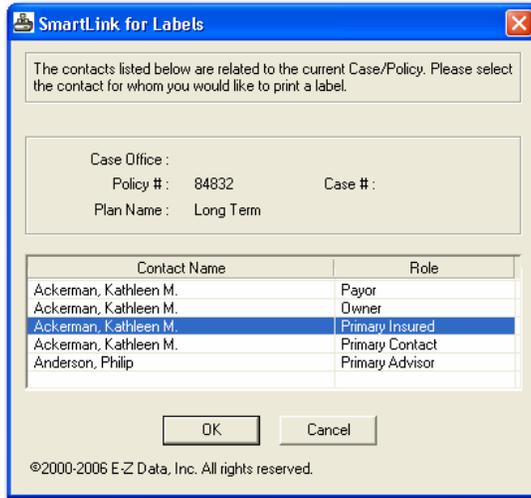
### To Create a Label from Policy and Pending Case

- After selecting a record, click the **SmartLink for Labels** button.
- The File Download dialog box displays with the following options:
  - Open** – Opens SmartLink for Labels with the contact information transferred to the Dymo program.
  - Save** – Saves the **solabel.elb** file to the specified directory on your computer.
  - Cancel** – Cancels the process.

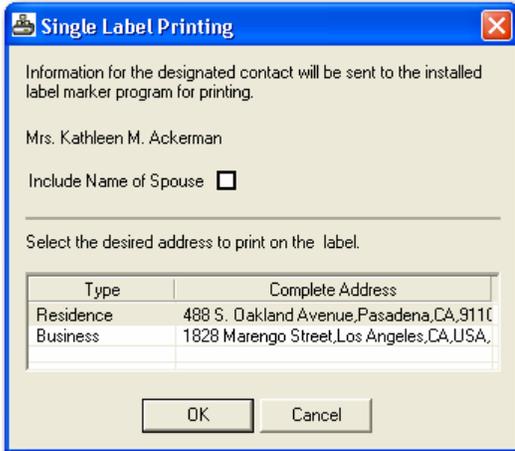
**Tip:** Clear the **Always ask Before Opening this File** option if you do not want to display this dialog box in the future.

3. Click the **Open** button to open the Dymo program and then the SmartLink for Labels dialog box, which displays the following as shown in the image below.

- Case #
- Policy #
- Plan Name
- List of Interested Parties Name and Role



4. Select the contact for which to print a label and then click the **OK** button.
5. Another dialog box opens and displays any available addresses for the selected contact. Note that the default address is bold.
6. To include spousal information in the label, select the **Include Name of Spouse** option.
7. After selecting the appropriate mailing address, select the **OK** button.



8. The address (as shown below) will display in the Dymo program; one or more copies of a single label can be printed.

