PRODUCT OVERVIEW

SmartOffice®

User Guide

Getting Started

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Introduction

SmartOffice® is the most powerful Customer Relationship Management solution in the insurance and financial services industry. This guide addresses many common questions users have as they begin to use SmartOffice. Please read the entire guide and contact the SmartOffice administrator with any questions.

SmartOffice® System Requirements

> **Note:** System requirements are subject to change. The most current SmartOffice System Requirements document can be found on the E-Z Data Web site at: www.ezdata.com/support/SO60_UserGuides/SO_system_requirements.pdf

To ensure acceptable performance of SmartOffice, the system requirements listed in this document 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.

All Microsoft system updates can be downloaded from Microsoft's Web site at www.update.microsoft.com/windowsupdate/v6/.

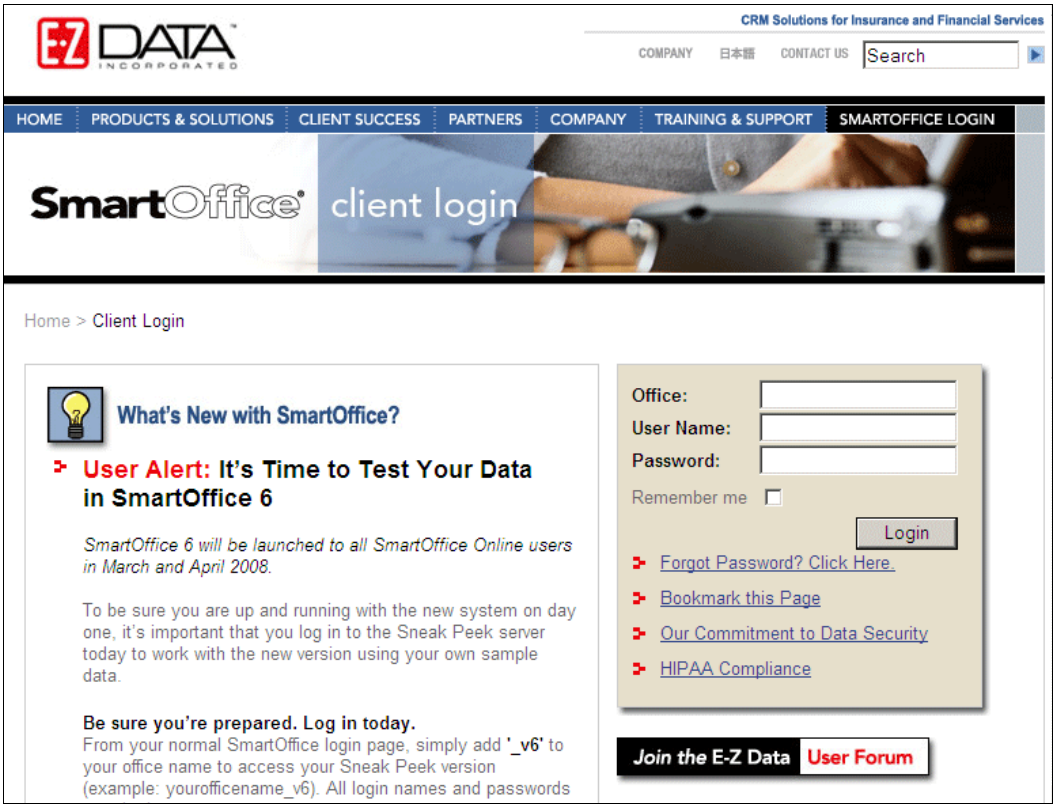
- **Microsoft® Windows®**
  - Windows XP (with Service Pack 2); or Windows Vista® (with Service Pack 1); 32-bit only; 64-bit not supported
- **Memory (RAM)**
  - 1 GB for Windows XP
  - 2 GB for Windows Vista
- **Microsoft® Internet Explorer®**
  - Version 7.0 (recommended) with all updates installed. Version 7.0 required for all SmartLink integrations, including Laser App, PaperClip, Quik! Forms, Dymo label printing, etc.
  - Version 6 with all updates installed is satisfactory for integration with Microsoft® Word®, Outlook®, and Excel®, as well as PDF export.
  - **Note:** Although SmartOffice 6 has been tested on Internet Explorer 6, more testing has occurred on Internet Explorer 7. For this and many other reasons, E-Z Data strongly recommends that users run SmartOffice 6 on Internet Explorer 7.

- **Microsoft Office®**
  - Microsoft Word 2007 or 2003 with the latest updates (required for Word integration)
  - Microsoft Excel 2007 or 2003 with the latest updates (required for exporting and printing the Excel files produced by SmartOffice)
  - Microsoft Outlook 2007 or 2003 with the latest updates (required for Outlook e-mail posting and Calendar/Contact synchronization)
  - The latest Office updates can be downloaded at office.microsoft.com/en-us/downloads/maincatalog.aspx
  - **Note:** While SmartOffice 5 worked with versions of Microsoft Office below 2003, due to major changes in the Office 2007 product, E-Z Data is unable to support integrations between SmartOffice and Microsoft Office versions prior to Office 2003.
- **Lotus® Notes®**
  - Version 6.5.1 or later (required for Notes integration)
  - Additional Lotus Notes Template changes are required for e-mail posting to work correctly with SmartOffice v6. Please review the SmartOffice v6 - Lotus Notes 7 Server Setup Guide and discuss this with your Lotus Notes administrator.
- **Adobe® Reader®**
  - Version 6 or later (required for viewing and printing the PDF files produced by SmartOffice). Download Adobe Reader at www.adobe.com/products/acrobat/readstep2.html
- **Contact Information**
  - **Technical Support:** (626) 585-3515 or support@ezdata.com

Logging in to SmartOffice the First Time

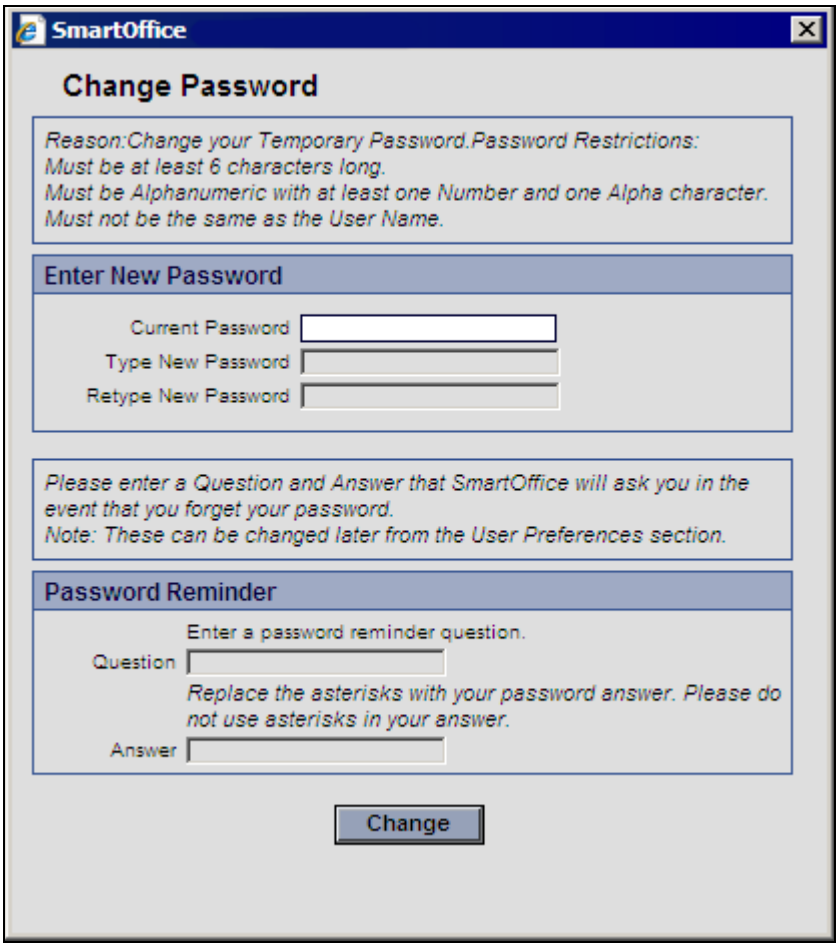
When the SmartOffice Administrator creates an account for a user, the user receives a series of e-mail messages containing the login URL, Office Name, User Name, and Password. Click the login hyperlink to access the SmartOffice Client Login page. Then follow these steps:

1. Enter the Office Name, User Name, and Password information included in the e-mail messages.



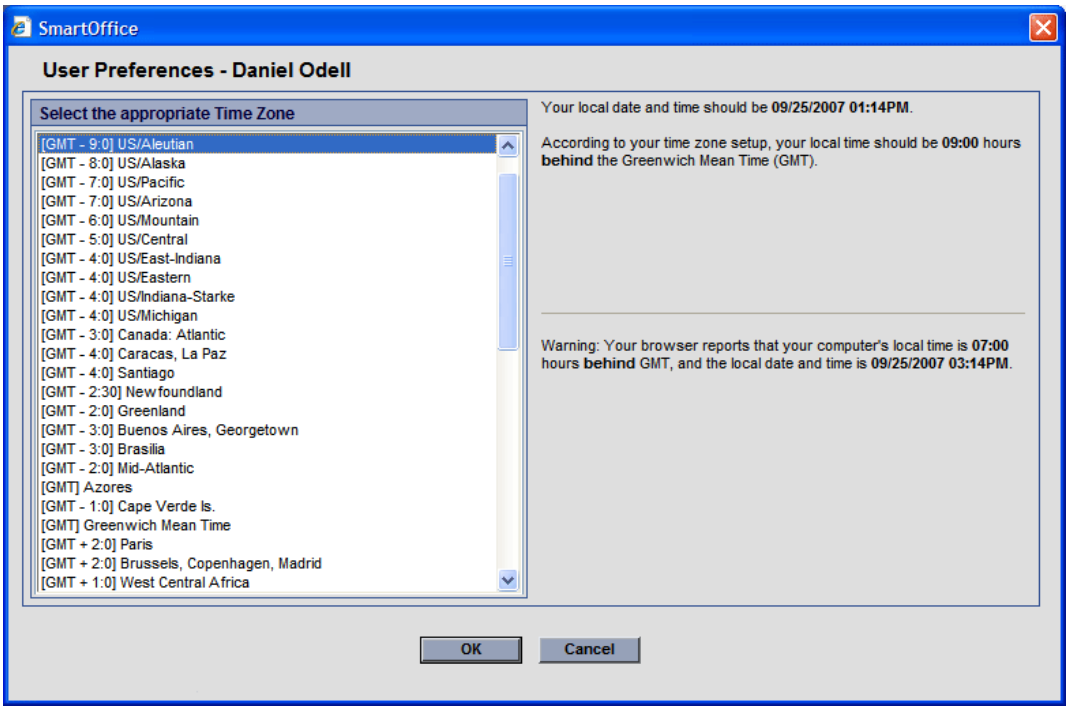
2. (Optional) Select the **Remember Me** option to have the login page remember the Office name and user name information entered in those fields for future logins. For security reasons, the password must be entered at every login.
3. Click the **Login** button.
4. When prompted, run the SmartOffice Configuration Tool to configure Internet Explorer to work with SmartOffice.

5. After the configuration process ends, the **Change Password** dialog box opens:



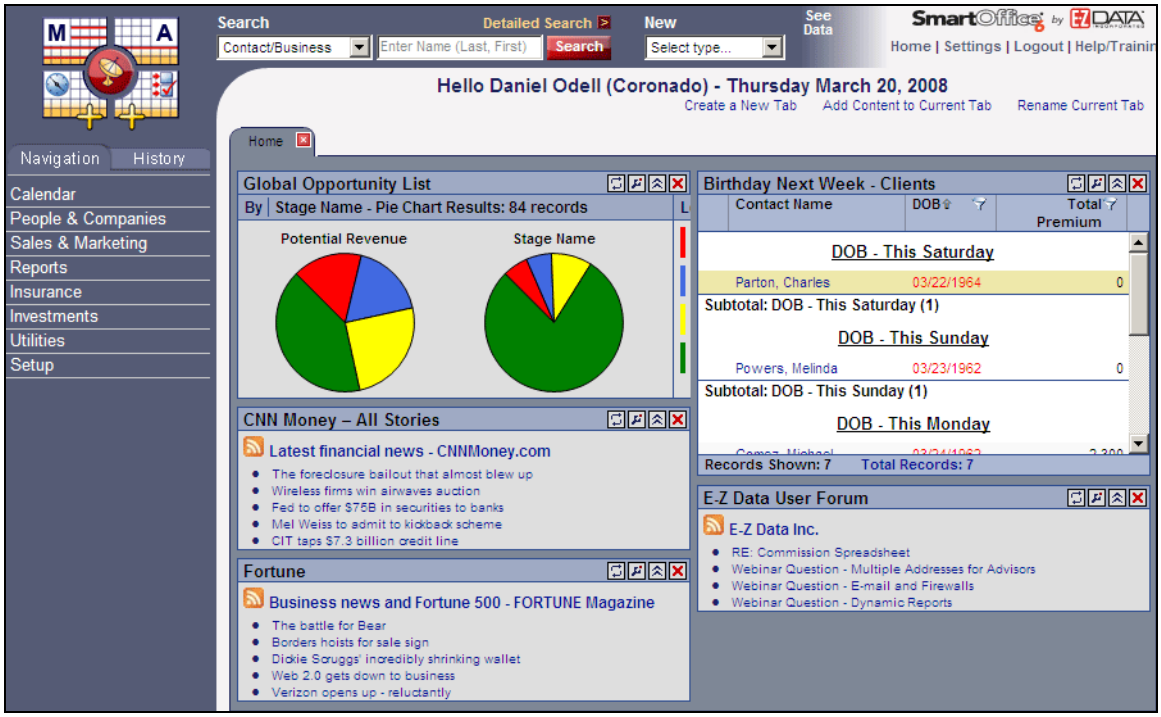
6. In the Current Password field, enter the password from the e-mail message.
7. In the Type New Password field, enter a new password.
8. In the Retype New Password field, retype the new password exactly as it was entered in the Type New Password field.
9. In the Question field, enter a password reminder question, e.g., “What is your favorite color?” or “What is your favorite sports team?” This question enables the user to access the system if the user’s password is forgotten.
10. In the Answer field, enter the answer to the password reminder question.
11. Click the **Change** button.

12. When prompted, select the appropriate time zone in the dialog box that opens:



13. Click the **OK** button.

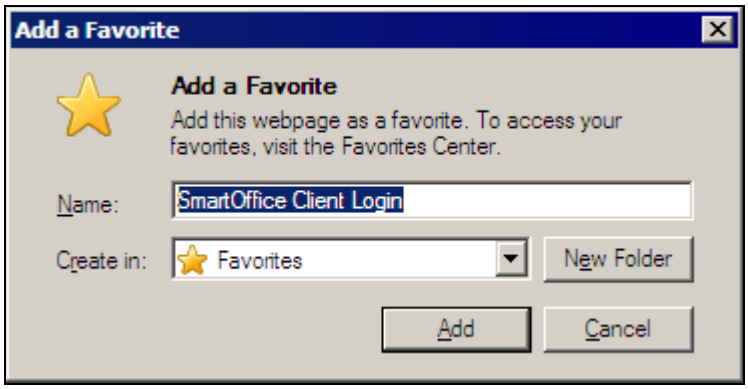
The SmartOffice home page displays:



Adding SmartOffice to the Browser Favorites List

After logging in to SmartOffice the first time, the user can add SmartOffice to Internet Explorer's Favorites list for quick access to the login page in the future.

1. From the Internet Explorer **Favorites** menu, select **Add to Favorites**.
2. In the Add a Favorite dialog box, SmartOffice will be entered by default. The name can be changed or left as is.

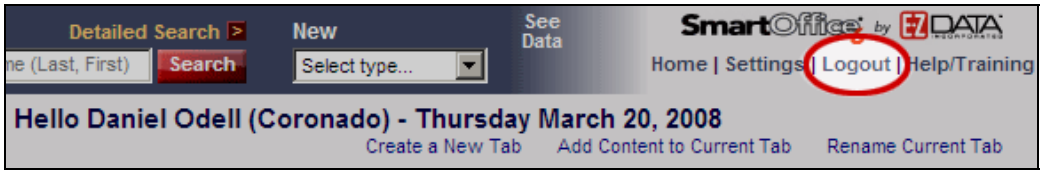


3. Click the **Add** button.
4. To log in to SmartOffice in the future, open Internet Explorer, click the **Favorites** menu, and select **SmartOffice** (or the name entered when the favorite was created).

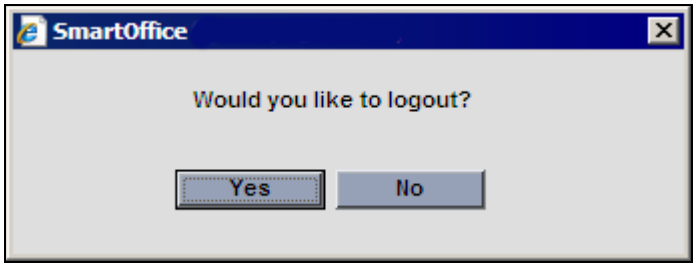
Logging Out of SmartOffice

To log out of SmartOffice, do **not** close the Internet Explorer window, as this can cause unusual issues during subsequent logins. Instead, follow these steps:

1. From the Global Hyperlinks in the top-right corner, select **Logout**.



2. When the confirmation message displays, click the **Yes** button.



Logging in to SmartOffice (After the First Time)

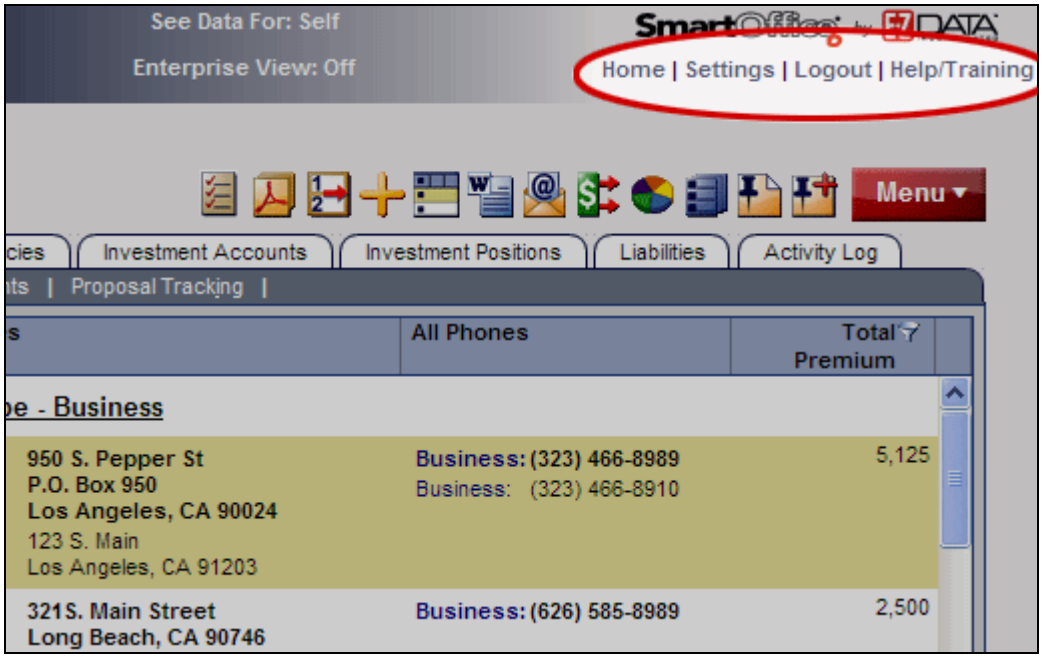
1. Open Internet Explorer.
2. Do one of the following:
   - If SmartOffice has been saved as a Favorite (see page 6), select **SmartOffice Client Login** from the Internet Explorer **Favorites** menu.
   - If SmartOffice has not been saved as a Favorite, enter the SmartOffice URL (refer to the e-mail message containing the SmartOffice login URL, or check with the SmartOffice administrator).
3. When the SmartOffice login page displays, enter the appropriate Office Name, User Name, and Password.
4. (Optional) Select the **Remember Me** option to have the login page remember the Office name and user name information entered in those fields for future logins. For security reasons, the password must be entered at every login.

Getting Familiar with SmartOffice

This section provides a quick SmartOffice tour to familiarize users with several unique features found in SmartOffice.

Global Hyperlinks

Global Hyperlinks are stationary hyperlinks located in the top right corner of the SmartOffice screen.

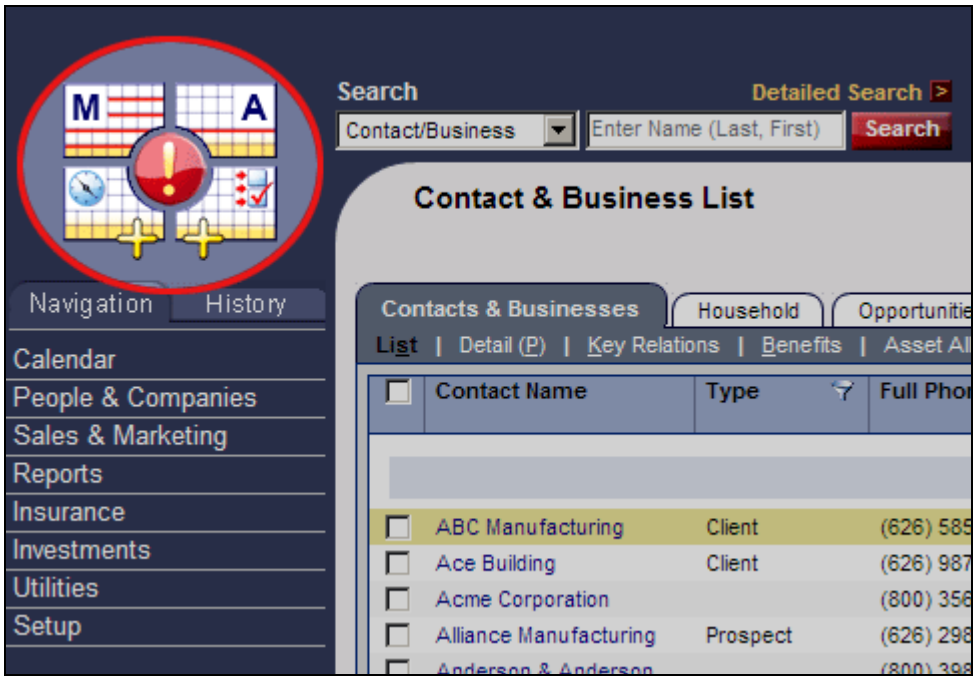


The function of each hyperlink is as follows:

- **Home:** Return to the SmartOffice home page.
- **Settings:** Access user preferences (e.g., Activity/Calendar Options and Correspondence Options).
- **Logout:** End the current SmartOffice session. (Remember not to close the browser window to log out of SmartOffice.)
- **Help/Training:** Access SmartOffice Help, User Guides, Training Movies, and Fast Classes. This hyperlink also enables the user to access information about additional SmartOffice modules and offer suggestions for improving SmartOffice.

Quick Action Corner

The Quick Action Corner in the top left corner of SmartOffice is visible from virtually all areas of SmartOffice.



The Quick Action Corner enables the user to perform the following tasks with a single click:

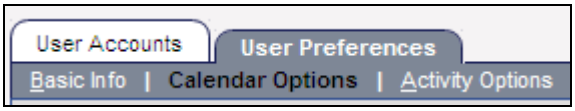
- View the calendar (Month, Week, Day, or Agenda view, depending on user preferences)
- Create calendar activities
- Create calendar tasks
- Access the Alert Center

Customizing the Quick Action Corner

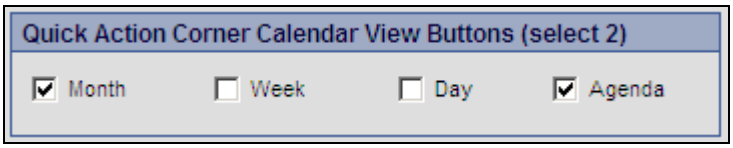
The Quick Action Corner can be customized to provide access to any two of the following calendar views: Month, Week, Day, or Agenda.

To select the calendar views:

1. From the Global Hyperlinks, select **Settings** to open User Preferences.
2. Click the **Calendar Options** content link.



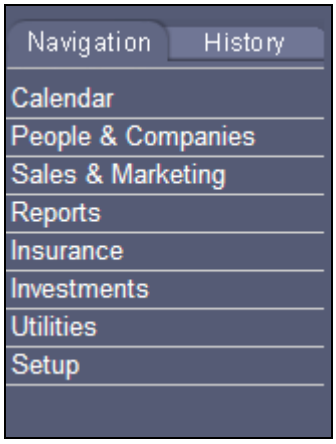
3. In the **Quick Action Corner Calendar View Buttons** section, select two calendar views.



4. Click the **Save** button in the Button Bar.

Navigation Tab

The Navigation tab is in the SmartOffice side menu, directly below the Quick Action Corner.

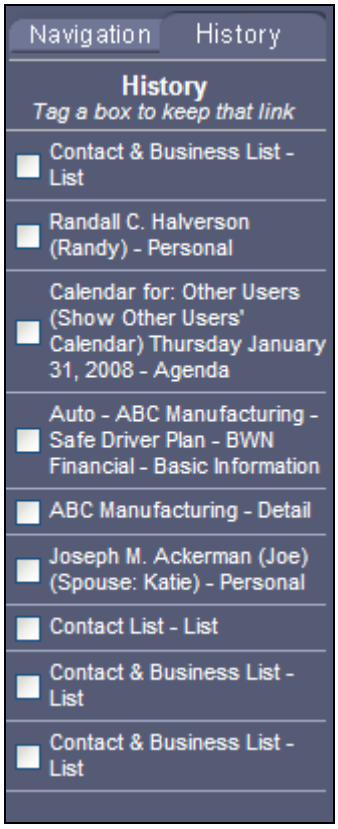


This tab enables the user to easily access various parts of SmartOffice (e.g., Calendar, People & Companies, and Sales & Marketing). Clicking a hyperlink displays an expanded list of options related to the current selection.

> **Note:** The options available from the side menu may vary from those pictured, depending on the SmartOffice modules purchased and user rights assigned.

History Tab

By clicking the **History** tab, located next to the Navigation tab, the user can quickly access recently visited SmartOffice pages.



The History tab remembers the last 10 pages visited and enables the user to bookmark any of those pages for fast access in the future.

Search

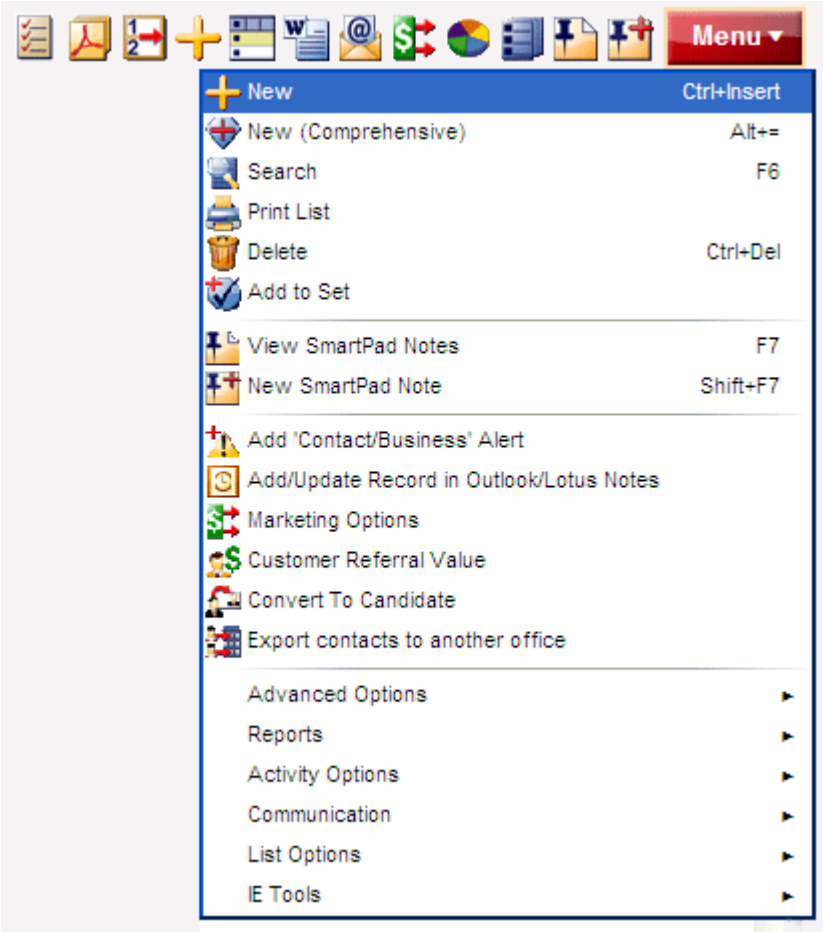
The Search section enables the user to perform quick searches for various records in SmartOffice. The user can select a record type from the Search down-down list, enter the search keywords (e.g., “last name, first name” to search for a person), and then click the **Search** button.

Detailed Search

SmartOffice also provides the ability to search using other pieces of information (e.g., phone numbers, e-mail addresses, and ZIP codes). To access these additional search options, click the **Detailed Search** hyperlink above the Search button.

Menu Button

The Menu button groups together all actions that the user can perform within the current section of SmartOffice.

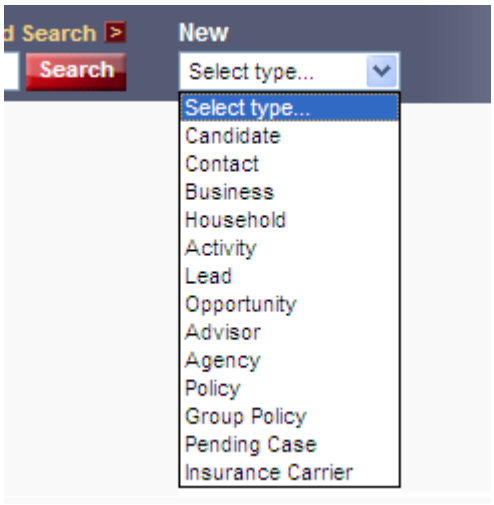


The options available when the user clicks the Menu button change depending on the area of SmartOffice in which the user is working.

> **Note:** For frequently used functions, the user can add any option from the Menu button to the current Custom Button Bar. Position the mouse pointer over any option in the expanded list, click and hold down the mouse button, and drag the option to the Custom Button Bar. To remove a button from the Custom Button Bar, click the button, hold down the mouse button, and drag the button onto the Menu button.

New Records

The New option enables the user to quickly add new records in SmartOffice. The available record types are listed in the drop-down list.



Tabs and Content Links

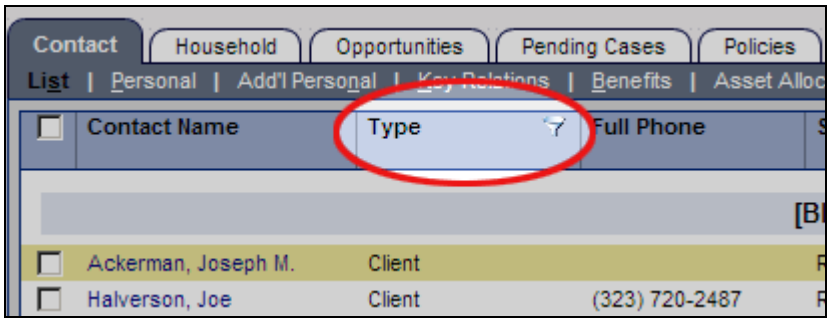
SmartOffice is organized using a series of tabs and corresponding content links. Each tab serves as a main heading (e.g., Contacts & Businesses, Household, etc.), while the content links provide access to various subsections of each tab.

For example, in following image, the active tab is Contacts & Businesses, while the content links related to that tab are List, Detail, Key Relations, Benefits, Asset Allocation, Letters/Documents, Proposal Tracking, and Expenses.

Column Sorting & Filtering

In SmartOffice, data is generally displayed in spreadsheet format, with individual records displayed in rows, and data within records displayed in columns.

To change the sorting order of a column from ascending to descending or vice versa, click the column heading on the spreadsheet (e.g., Type).



Certain columns have a small filter button next to their names (the button looks like a funnel). This button enables the user to filter (i.e., restrict) the list to display only data that meets certain criteria. For example, to filter a list of businesses to show only those that are clients, click the filter button on the Type column and specify **Client**. This enables the quick manipulation of list data without the need to create a separate report.

SmartOffice Utilities

SmartOffice has a number of utilities available for download that integrate seamlessly with third-party software, such as Microsoft Office.

- **SmartMail E-mail Posting:** Use Microsoft Outlook or Lotus Notes to post copies of e-mail messages to the SmartPad.
- **SmartLink for Word:** Send, modify, and create form letters in Microsoft Word.
- **SmartLink for Excel:** Export data from SmartOffice to Excel.
- **SmartLink for Windows Explorer:** Post files from the local computer to the SmartPad.
- **SmartOffice Folder Watch**: Enable the monitoring of designated folders on the local computer and the automatic uploading of newly added files to the Letters/Documents area of a Contact.
- **SmartAlerts:** Receive system tray notifications of alerts from SmartOffice.
- **SmartLink for Adobe PDF:** Export lists and reports to Adobe PDF format.

These components can be installed manually, or through the SmartOffice Download Manager (these options are explained later in this section).

> **Note:** Using SmartOffice Utilities with Microsoft Office requires Office 2003 SP2 or higher. For e-mail posting, Outlook 2003 SP2 or higher is required. If Outlook is not configured to send and receive e-mail, contact the organization's Internet Service Provider (ISP) or company IT support team. This guide provides instructions for using SmartOffice Utilities with Office 2003.

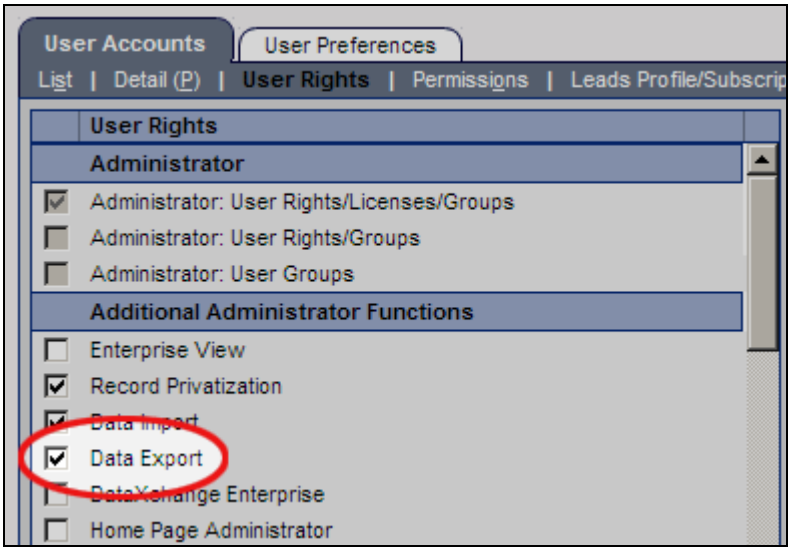
Preparing to Use SmartOffice Utilities

To ensure the proper operation of SmartOffice Utilities, Microsoft Office 2003 Service Pack 2 or higher must be installed and configured correctly. Make sure Windows and Office are up to date by checking for updates on Microsoft's Web site.

> **Note:** The SmartOffice Utilities installer will check to make sure that Office 2003 (or later) and Microsoft's .NET Framework are installed. These are required for SmartOffice Utilities. If the system does not meet these requirements, a message will display to inform the user.

In addition, to use SmartMail E-mail Posting and SmartLink for Excel, the user must have the proper user rights in SmartOffice. To enable those rights, follow these steps:

1. Click **Setup** on the side menu and select **User Accounts** from the expanded list. (If this option is not visible, check with the SmartOffice administrator).
2. From the Search Options dialog box, enter the appropriate user name and click the **Search** button.
3. If the User List displays, tag the appropriate user and then click the **User Rights** content link.
4. To use SmartLink for Excel, select the **Data Export** user right. This option is in the User Rights section on the left side of the screen, under the Additional Administrator Functions heading:



5. To use SmartMail E-mail Posting, scroll down in the User Rights section to the E-mail Integrations heading and select the **SmartMail for Outlook E-mail** or **SmartMail for Lotus Notes E-mail Posting** user right. (If the appropriate option is not displayed, contact the SmartOffice administrator.)
6. Click the **Save** button.

Installing SmartOffice Utilities

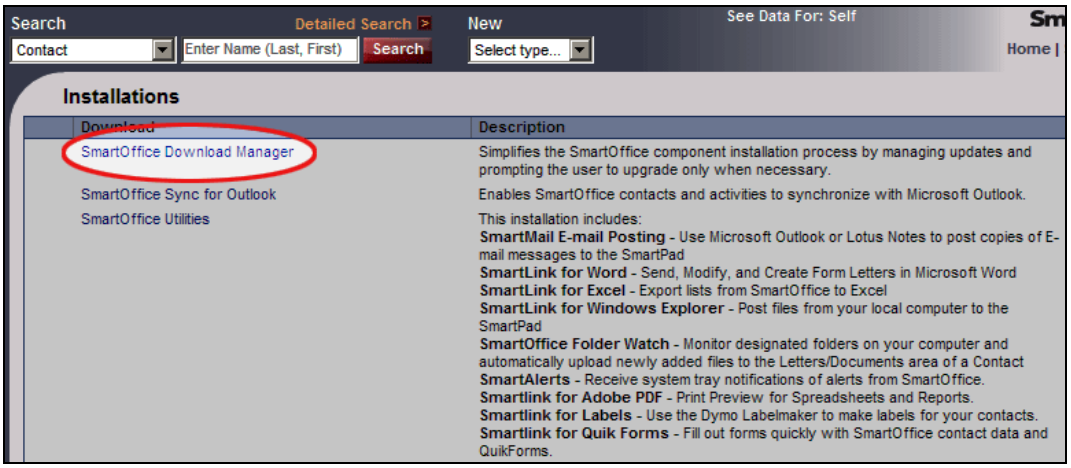
SmartOffice Utilities can be installed manually or by using the SmartOffice Download Manager.

The advantage of using the Download Manager is that it automates much of the download and installation process. It also makes updating SmartOffice Utilities easier when new versions are released.

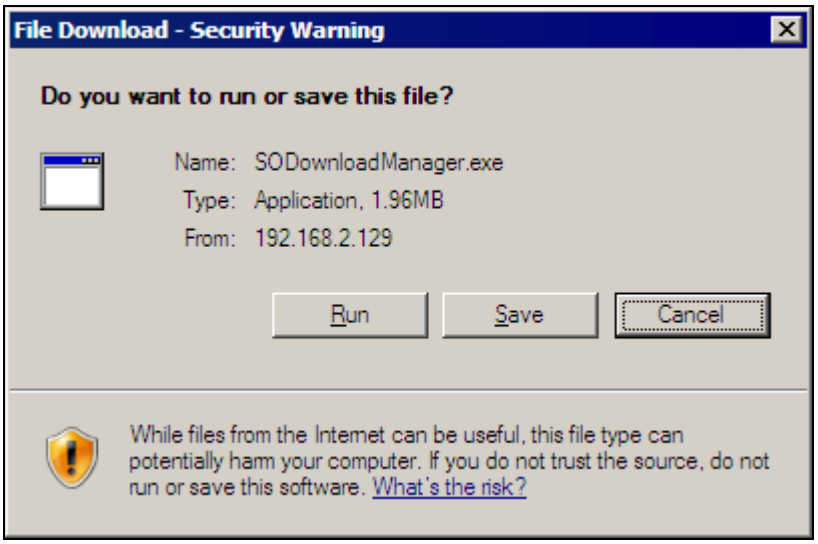
SmartOffice automatically prompts the user to install the Download Manager if the user tries to use a feature that requires SmartOffice Utilities or another SmartOffice software component.

However, the user can install either Download Manager or SmartOffice Utilities anytime by following these steps:

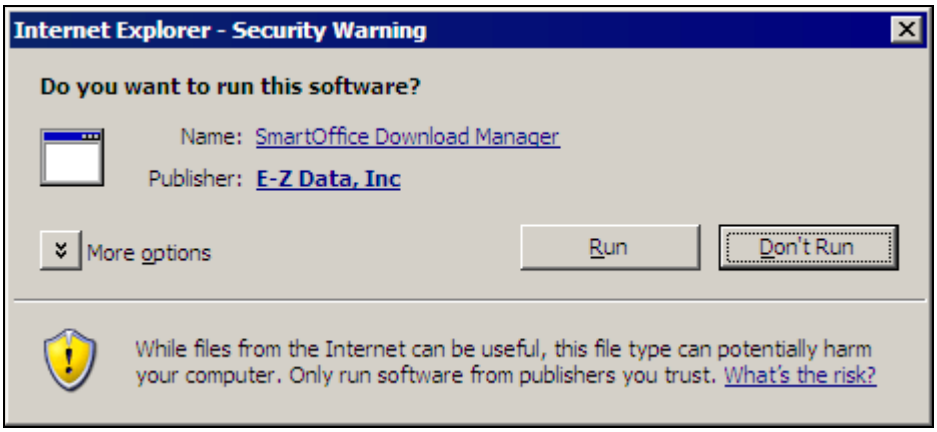
1. Click S**etup** from the side menu and then select **Installations** from the expanded list.
2. Click either the **SmartOffice Download Manager** hyperlink or the **SmartOffice Utilities** hyperlink.



3. When the message displays confirming the installation, click the **Yes** button.
4. When the security warning message displays, click the **Run** button.

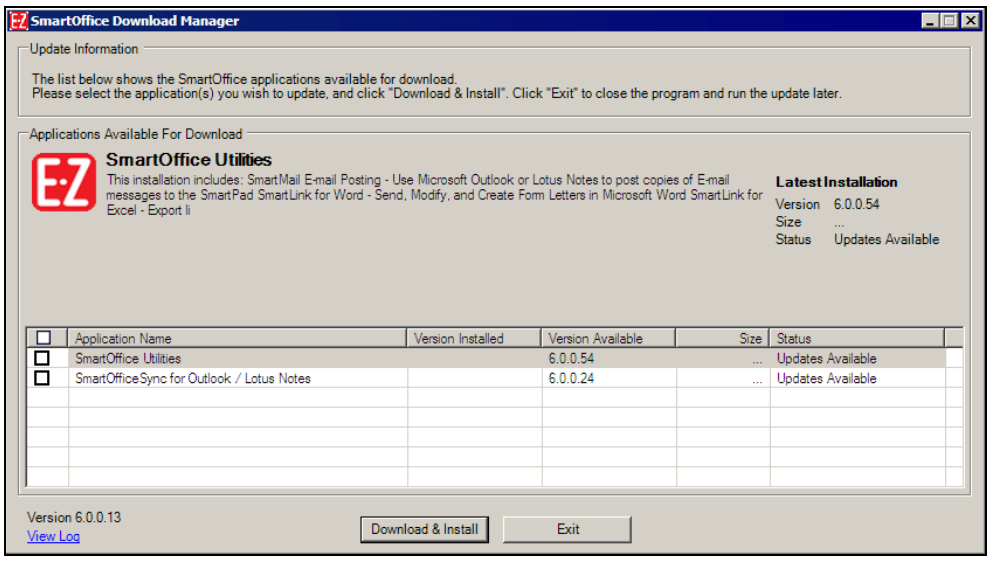


5. Once the download is complete, another Internet Explorer security warning displays. Click the **Run** button to begin the installation.

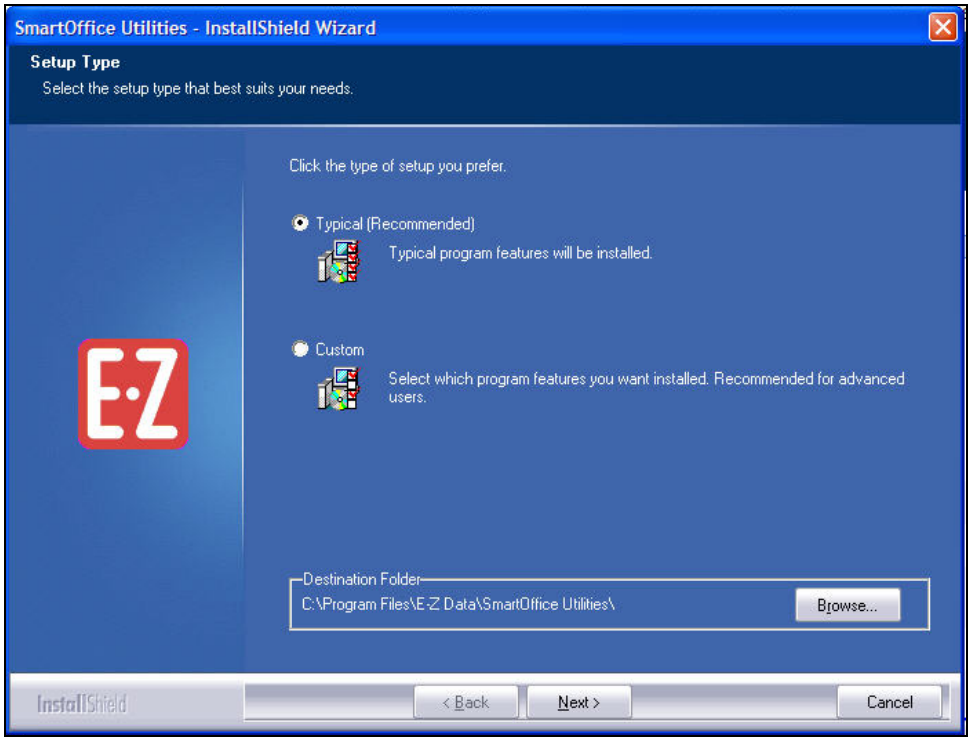


6. For the SmartOffice Download Manager:

   o After the software installs (which occurs automatically), tag the **SmartOffice Utilities** option in the Download Manager dialog box, and then click the **Download & Install** button.



7. For the SmartOffice Utilities installer:
    - When prompted to select an installation option, select **Typical (Recommended)** and then click the **Next** button.



8. Once the installation is complete, click the **Finish** button.

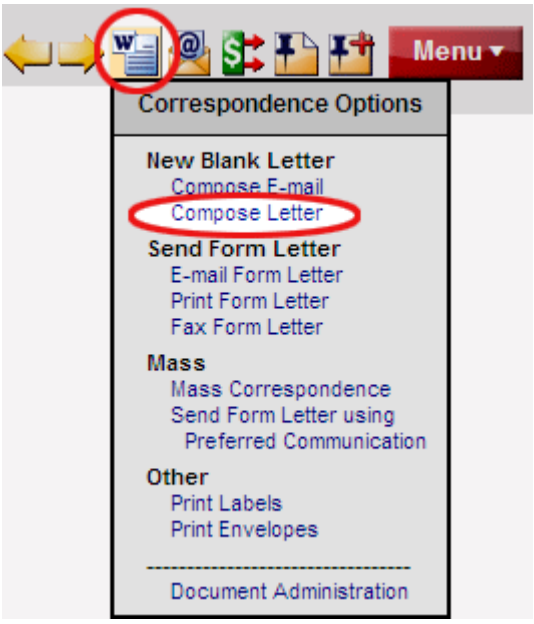
If the user was in the middle of a workflow (e.g., printing a letter) when the SmartOffice Utilities installation began, the user will need to restart that workflow.

Creating Letters Using SmartOffice

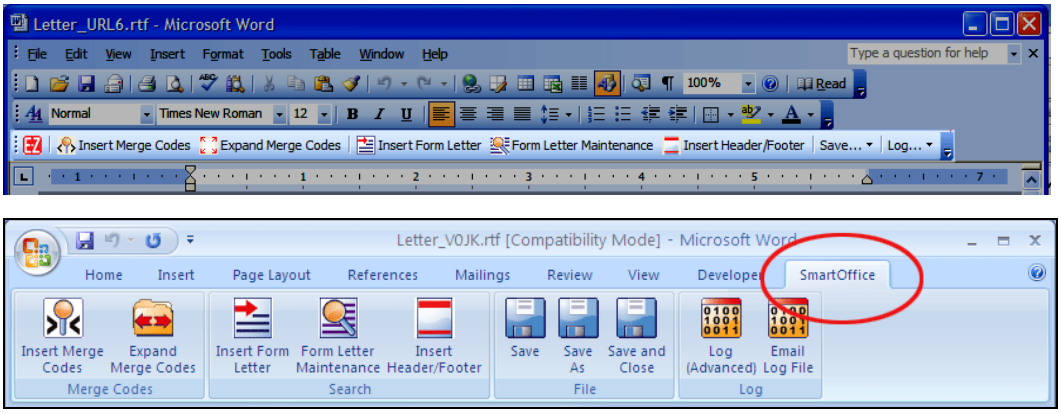
With SmartOffice Utilities installed, the user can create and send letters from within SmartOffice. This section describes the steps for creating letters and the multiple ways this functionality can be accessed.

Creating a Letter from a Contact

1. Search for and open the Contact for whom the letter is being created (see *Search* on page 11).
2. Position the mouse pointer over the **Compose Letter** button and select the **Compose Letter** option under New Blank Letter.



3. A new instance of Microsoft Word will open, featuring a new SmartOffice toolbar or tab, depending on the version of Word being used.



> **Note:** Once SmartOffice Utilities are installed, the SmartOffice toolbar or tab is always present in Word. This enables the user to start writing letters directly from Word.

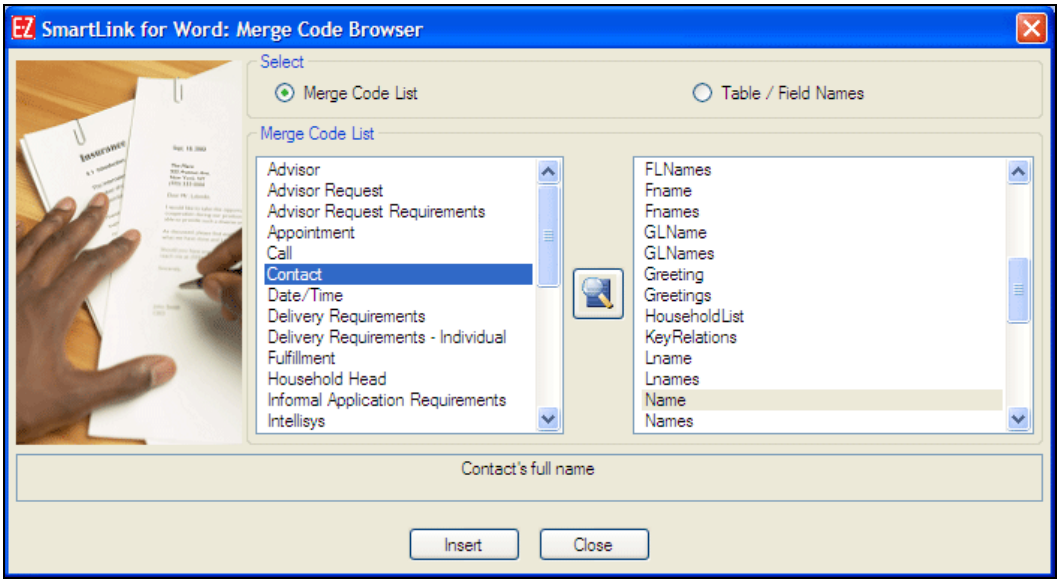
The function of each toolbar/tab button is as follows:

- **Insert Merge Codes:** Select the information to be automatically acquired from the Contact, such as name, address, or e-mail address.
- **Expand Merge Codes:** After inserting merge codes, the user can expand them to insert the selected data from the selected Contact.
- **Insert Form Letter:** To modify an existing form letter, click this button to find the form letter and insert its text into the current letter.
- **Form Letter Maintenance:** Search for and open existing form letters. This function is used mainly to update and save changes to form letters.
- **Insert Header/Footer:** If a page header or footer has been specified in SmartOffice's Correspondence Options, click this button to import a header or footer into the letter.
- **Save:** Click this button to open a sub-menu with the options **Save**, **Save As**, and **Save and Close**. These options enable the user to save the letter to the Contact's record—or even to save the document as an entirely new form letter.

4. Begin typing the text of the letter.
5. To insert information from SmartOffice into the letter, click the **Insert Merge Codes** button in the SmartOffice toolbar or tab. The SmartLink for Word: Merge Code Browser dialog box will open.

6. Data from SmartOffice is inserted by using merge codes or by specifying individual fields from tables within SmartOffice. Merge codes are shortcuts for entering common data or data that is not available by selecting individual fields (e.g., today's date).

   For example, to insert the contact's name, select the **Contact** category from the left side of the screen. The right side of the screen changes to display the merge code options available for the Contact category:



   Select the **Name** code and then click the **Insert** button to insert the contact's name.

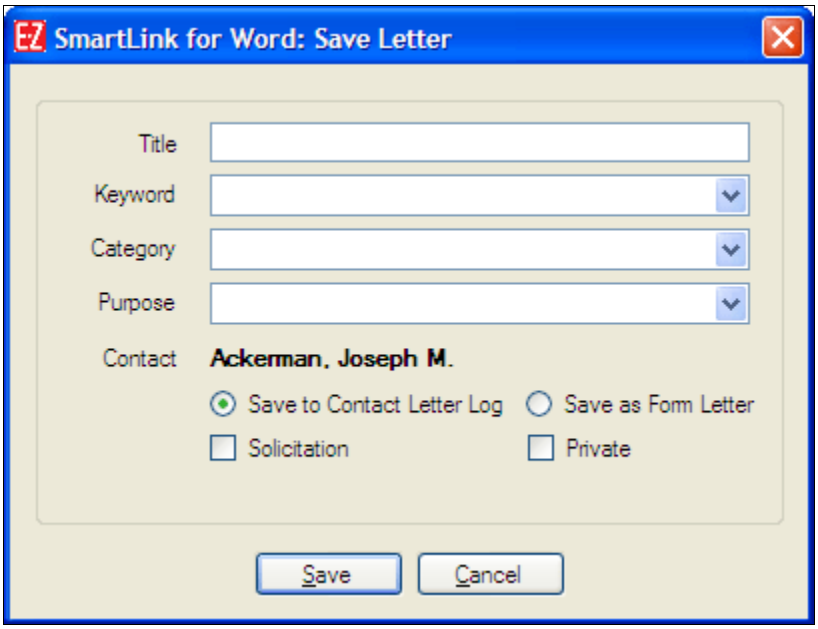
7. To toggle the Merge Code Browser window to show individual fields, select the **Table/Field Names** option on the top right side of the dialog box. Notice that the options listed on the right change based upon the Table selection on the left.

> **Note:** The user can also click the **Search** button if a specific merge code cannot be found. For example, to find the correct merge code for inserting a contact's address into the letter, click the **Search** button, enter "Address," and select the most appropriate choice.

8. After inserting merge codes, click the **Close** button.

9. Once the letter is finished, click the **Save** button on the SmartOffice toolbar or tab in Word.

10. In the Save Letter dialog box, enter details about the letter and click the **Save** button.



The options in this dialog box are as follows:

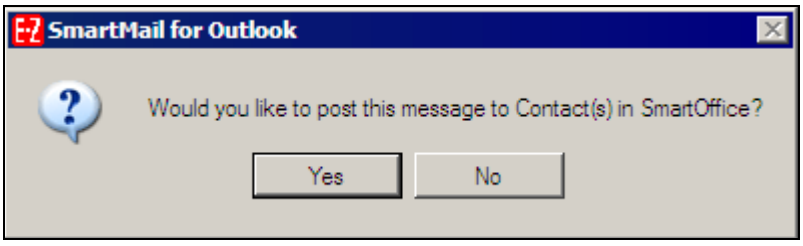
- **Title:** A unique name for the letter.
- **Keyword:** Keywords enable the user to further classify the letter (e.g., Address change, Estate planning, etc.).
- **Category:** Categories are used to group letters (e.g., Sales, Service, Recruiting).
- **Purpose:** This option is used primarily for automating Pending Case Management workflows and can be skipped for most letters.
- **Contact:** This is the name of the contact associated with this letter.
- **Save to Contact Letter Log:** This option treats the letter as a one-time only letter and saves the letter only to the letter log of the contact identified in the Contact field.
- **Save as Form Letter:** To save this letter as a form letter, select this option. The letter will be saved in Document Administration in SmartOffice.
- **Solicitation:** Select this option if the letter is being used to generate new business.
- **Private:** Select this option to prevent other users in the office from reading the letter being sent to the contact.
- **Save:** Click this button to upload the letter to the SmartOffice server.
- **Cancel:** Click this button to return to the letter and make additional changes.

Sending and Posting Outlook E-mail Messages

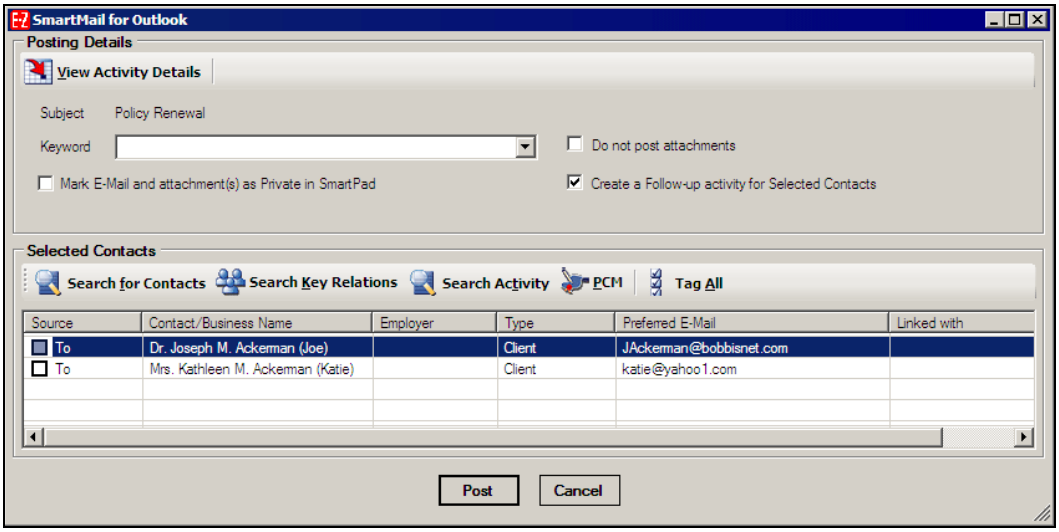
SmartMail for Outlook enables the user to post Outlook e-mail messages, both sent and received, to the SmartPad (notepad) of the appropriate Contact(s) in SmartOffice, eliminating the need to cut and paste e-mail text.

Sending an E-mail Message to a Contact

1. Go to the Contact's Personal content link and click the contact's e-mail address hyperlink.
2. The standard Outlook message window will open, with the contact's e-mail address in the To field. Compose the message and then click the **Send** button.
3. When the system asks whether to post the message to SmartOffice, click the **Yes** button.



4. In the posting dialog box, tag the contacts whose SmartPads should be updated with the content of this e-mail message.



To post the message to contacts not listed, click the **Search for Contacts** button to select additional SmartOffice contacts.

5. Click the **Post** button. This sends the message to the selected contacts through Outlook and posts the message to the selected contacts' SmartPads.

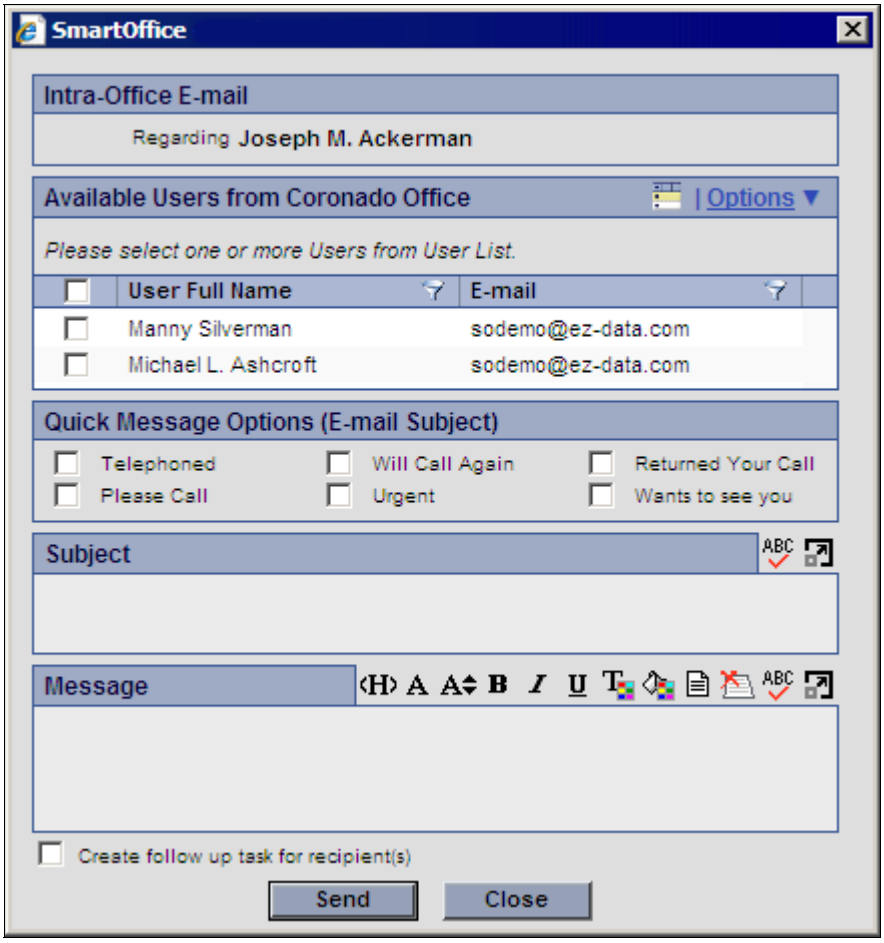
> **Note**: If a logged in SmartOffice user creates an e-mail message from within Outlook, the user will still be prompted to post the message to one or more contacts in SmartOffice. Follow the same steps to post the message.

Sending an Intra-Office E-mail Message

With the Intra-Office E-mail feature, the user can send a message to other users in the office regarding the current contact and have the message posted to the contact's SmartPad. The message is sent to the e-mail addresses listed in the User Preferences of the selected users.

1. After selecting a contact in the Contact List (or while viewing the Contact's Personal content link), click the **Intra-Office E-mail** button.

2. In the Intra-Office E-mail dialog box, tag each user who should receive the message.



3. Select an appropriate subject in the Quick Message Options section or enter a subject in the Subject field (or both).
4. Type the text of the message in the Message box and click the **Send** button. The e-mail message is sent to the internal users and is automatically posted to the current contact's SmartPad.

Posting Previously Sent/Received Messages

After SmartOffice Utilities are installed, a **Post E-mail to SmartOffice** button displays on the Outlook toolbar. Use this button to post an e-mail message that was previously sent or received using Outlook. Follow these steps:

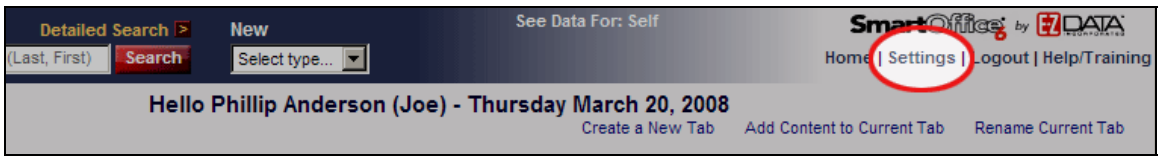
1. Log in to SmartOffice.
2. Log in to Outlook and highlight the message to be posted.
3. Click the **Post E-mail to SmartOffice** button.
4. In the dialog box that opens, tag the contacts whose SmartPads should be updated with the contents of the e-mail message. As before, click the **Search for Contacts** button to add contacts not listed.

> **Note:** The contact names displayed in this list are determined by selections made in SmartMail Posting Options. To access these options, click the **Options** button in the SmartMail for Outlook toolbar.

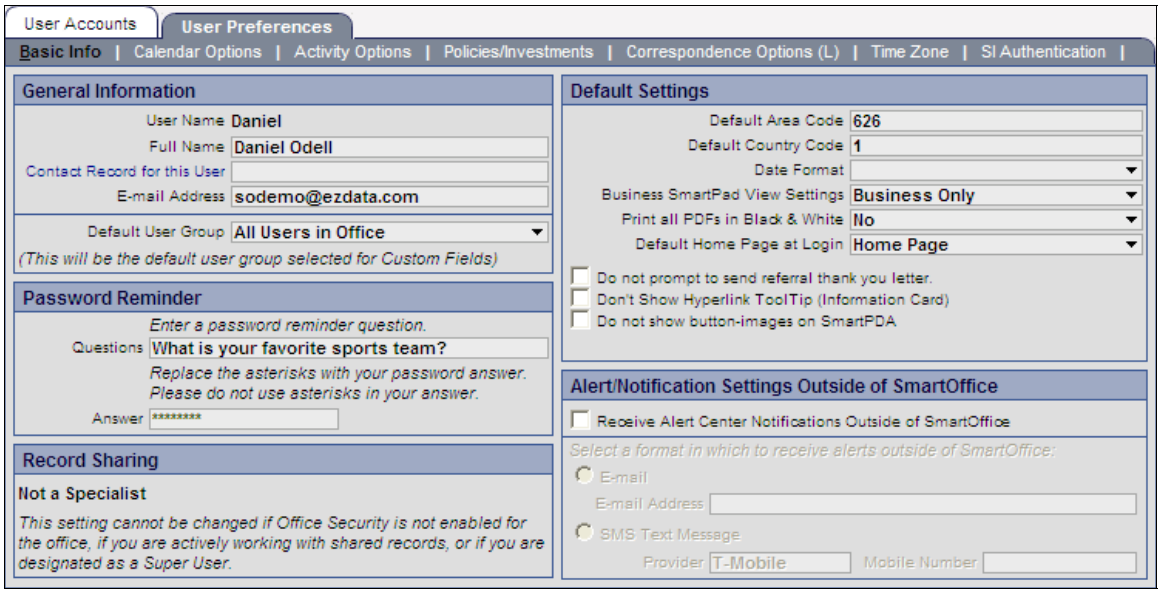
5. Click the **Post** button. The e-mail message is posted to each selected contact's SmartPad.

Setting User Preferences

The SmartOffice administrator specifies default user preferences for all users when creating user accounts. To review or make changes to these preferences, select **Settings** from the Global Hyperlinks:



User Preferences – Basic Information



The Basic Info content link displays general user information, a password reminder question (to be displayed if the user forgets his/her password), and miscellaneous options. Refer to the information in the following table to configure these options.

General Information	
User Name	The login name assigned to the user by the SmartOffice administrator. This field cannot be edited.
Full Name	The user's full name as it should display on various SmartOffice screens.

Contact Record for this User	The user may create a Contact in SmartOffice and enter his/her name, job title, address, phone number, etc. The information entered, when linked through this field, can be inserted into letters using merge codes.
E-mail Address	This is the address used to receive password/login information and Outlook sync account verification. It is also the From/Reply To address for outgoing e-mail messages.
Default User Group	SmartOffice enables the user to maintain multiple versions of custom fields for Policies, Contacts, and Businesses for various User Groups. This is an advanced feature and should be set to **All Users in the Office** until the user is comfortable creating User Groups and custom fields.
Password Reminder	
Question, Answer	SmartOffice has a password reminder feature for those cases in which the user forgets his/her password. When the Forgot Password feature on the SmartOffice login page is used, this reminder question displays. If the user's answer matches the answer entered here, SmartOffice generates a new password and sends it to the e-mail address specified in the E-mail Address field.
Record Sharing	
Record Sharing	Record Sharing applies only to offices that have purchased and enabled the Enterprise View option. To enable users in another office to view records from this office, the Record Sharing Option can be set.
Default Options	
Default Area Code	This is the areas code that is automatically populated when the user adds a phone number.
Default Country Code	This is the country code that is automatically populated when the user adds a phone number. Enter a 1 in this field for the United States.

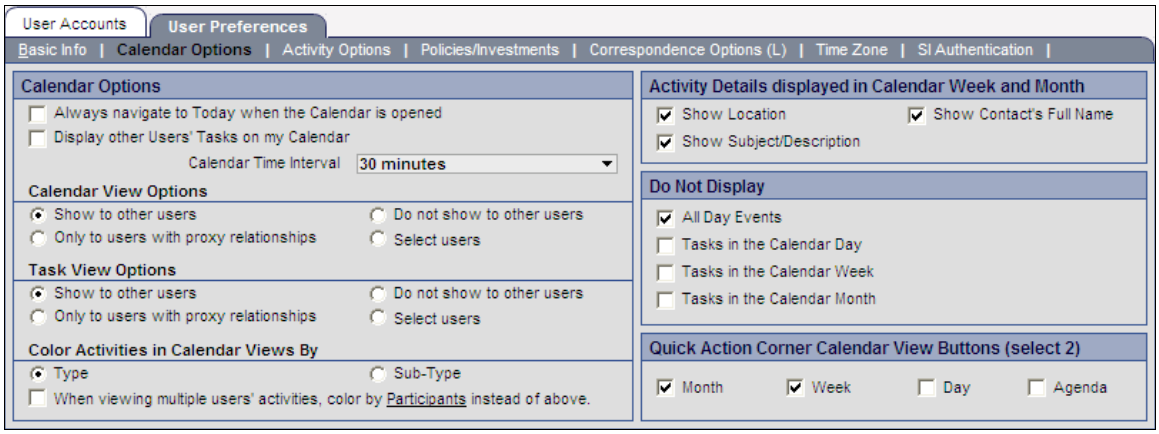
Default Enterprise View Mode	If Enterprise View is enabled, specify whether the default view should include records for all the offices in the office hierarchy or only those records in the current office.
Date Format	To use a date format that is different from the format set for the office, select a format from the drop-down list. Leave this field blank to use the default office date format.
Business SmartPad View Settings	When viewing the SmartPad for a Business, the user may display SmartPad entries for: • The Business only • The Business and its Key Relations (e.g., partners in the business, attorneys, CPAs, or other people who are associated with this business) • The Business and the linked Primary Contact • The Key Relations of the Business only
Print all PDFs in Black & White	Specify whether SmartOffice-generated PDF files should be printed in black & white or color.
Default Home Page at Login	Select the page that should display after a successful SmartOffice login.
Do not prompt to send referral thank you letter	When the Referred By field is completed while creating a Contact, SmartOffice will prompt the user to send a thank you letter to the referring contact (provided that the contact exists in SmartOffice). Selecting this option tells SmartOffice NOT to display this prompt.
Don't Show Hyperlink ToolTip (Information Card)	Turns off the Information Card that displays contact information when the mouse pointer is positioned over a contact's name in the Contact List.
Do not show button-images on SmartPDA	Select this option to improve load times in SmartPDA by loading text descriptions as opposed to button-images.

Alert/Notification Settings Outside of SmartOffice	
Receive Alert Center Notifications Outside of SmartOffice	Select this option to receive any messages sent through the Alert Center by e-mail or SMS text message. Enter the appropriate e-mail address or SMS text message provider and number.

User Preferences – Calendar Options

The Calendar Options content link enables the user to specify default settings for the SmartOffice calendar. To access Calendar preferences:

1. Select **Settings** from the Global Hyperlinks.
2. Click the **Calendar Options** content link.



Refer to the information in the following table to set these options.

Calendar Options	
Always Navigate to Today when the Calendar is opened	To view the current day whenever the calendar is accessed, select this option. Otherwise, the calendar will open to the last day viewed.
Display other Users' Tasks on my Calendar	To view other users' tasks while viewing their calendars, select this option.
Calendar Time Interval	This setting specifies whether the calendar display is divided into intervals of 30 minutes or 1 hour.

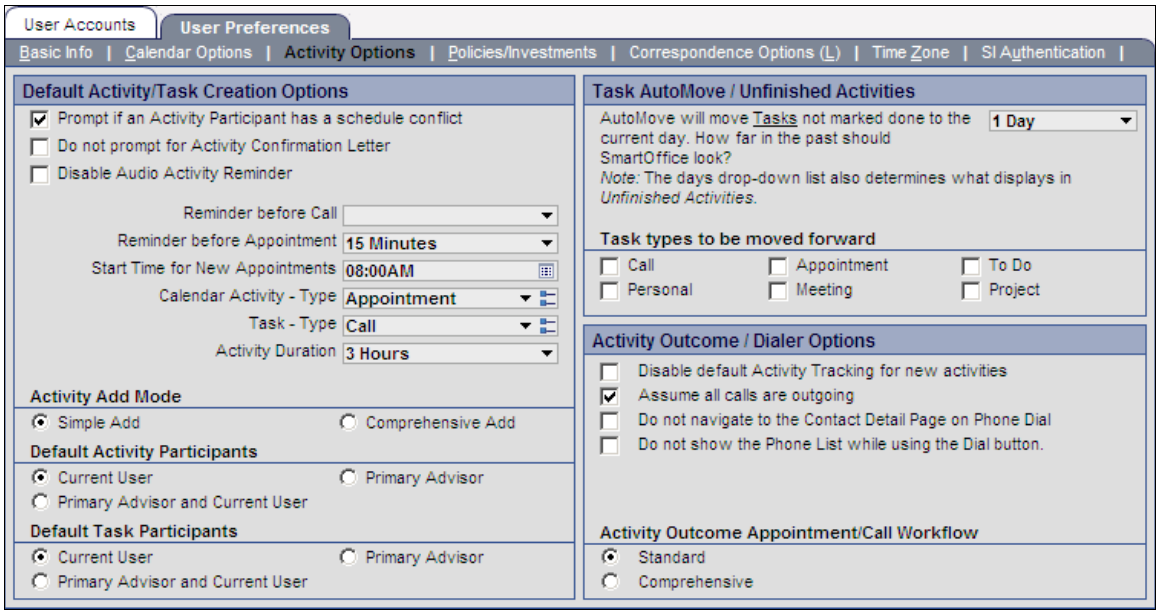
Calendar View Options, Task View Options	• Show to other users: Enables all users to view the current user's calendar/tasks. • Only to users with proxy relationships: Shows calendar/tasks only to those users who reside in the current user's proxy domain. • Do not show to other users: Hides calendar/tasks from other users, regardless of their settings. • Select users: Specifies which users can view the current user's calendar/tasks. After selecting this option, click the **Add Users who can view My Tasks** icon to select specific users.
Color Activities in Calendar Views By	This setting color codes activities by type, sub-type, or participant (when multiple users' calendars are viewed at once).
Activity Details displayed in Calendar Week and Month	
Show Location	Displays the entry in the appointment location field, if populated, on the Week and Month views.
Show Subject/Description	Displays the entry in the appointment subject/description box, if populated, on the Week and Month views.
Show Contact's Full Name	Displays the contact's full name in the Week and Month views.
Do Not Display	
All Day Events	Removes the All Day Events box from the Day and Week views.
Tasks in the Calendar Day	Removes the task list from the calendar Day view.
Tasks in the Calendar Week	Removes the task list from the calendar Week view.
Tasks in the Calendar Month	Removes the task list from the calendar Month view.

Quick Action Corner Calendar Views Buttons (select 2)	
Month, Week, Day, Agenda	Select two calendar views to access from the Quick Action Corner.

User Preferences – Activity Options

The Activity Options content link enables the user to specify default settings for activities in the SmartOffice calendar. To access Activity preferences:

1. Select **Settings** from the Global Hyperlinks.
2. Click the **Activity Options** content link.



Refer to the information in the following table to configure these options.

Default Activity/Task Creation Options	
Prompt if an Activity Participant has a schedule conflict	To be alerted when scheduling a timed activity that conflicts with any participant's previously scheduled timed activity, select this option.
Do not prompt for Activity Confirmation Letter	When a future timed appointment or call is scheduled, SmartOffice normally prompts the user to send a confirmation letter. To disable this prompt, select this option.

Disable Audio Activity Reminder	To disable the audio reminder associated with activity reminders, select this option.
Reminder before Call	This option controls the reminder message that displays before timed Call activities. Note that the user must be logged into SmartOffice to receive the reminder.
Reminder before Appointment	This option is similar to the Reminder before Call, except that it applies only to timed activities categorized as appointments.
Start Time for New Appointments	To automatically populate the start time of new appointments with a specific time, enter the time in this field. Even when this setting is specified, however, the user can edit the start time of any new activity.
Calendar Activity – Type	When the user creates a calendar activity, the option selected here displays by default in the Type field.
Task – Type	When the user creates a calendar task, the option selected here displays by default in the Type field.
Activity Duration	When the user creates a calendar activity, the option selected here automatically populates the End Time of the activity based on the Start Time.
Activity Add Mode	Select the **Simple Add** option to create activities using a simplified dialog box that requests only basic information. Select the **Comprehensive Add** option to create activities using a full dialog box with all available options.
Default Activity/Task Participants	These options specify the default participant(s) when an activity/task is created: • Current User: Only the user creating the activity/task is included as a participant. • Primary Advisor: Only the primary advisor of the contact associated with the activity is included as a participant. • Primary Advisor and Current User: Both the user creating the activity/task and the primary advisor for the contact associated with the activity are included as participants.

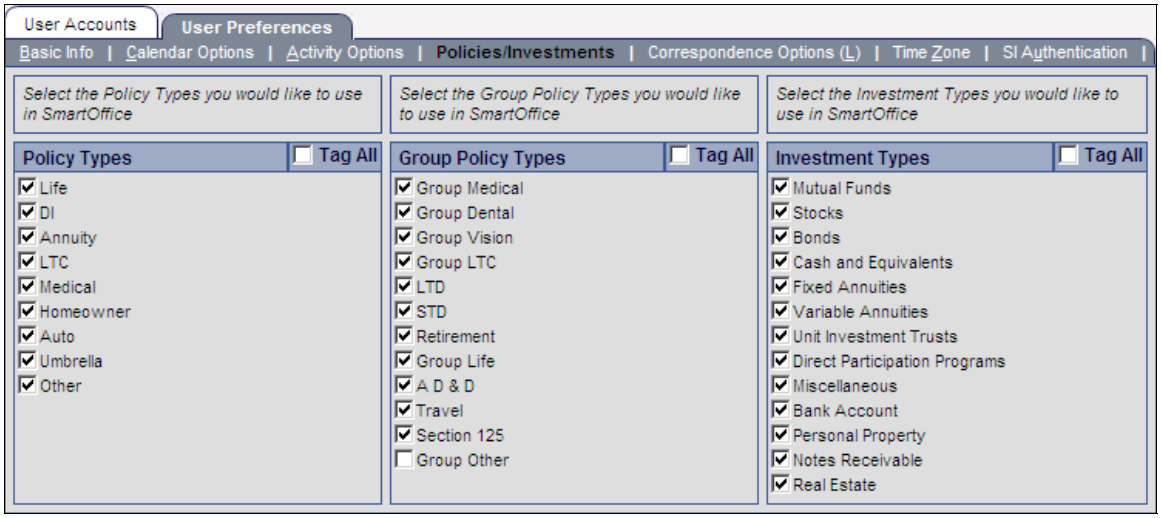
Task AutoMove / Unfinished Activities	
Days	This drop-down list indicates how many days in the past SmartOffice should look for unfinished tasks that need to be moved to the current day upon login. Select a range that takes into account vacations and other time away from the office. For example, if vacations are typically two weeks, select at least 14 days.
Task types to be moved forward	Specify the task types to be moved forward. If a task type is not selected, no tasks of that type will be moved automatically. • The Call option moves active untimed Call activities to the current day. • The Personal option moves active untimed Personal activities to the current day. • The Appointment option moves active untimed Appointments to the current day. • The Meeting option moves active untimed Meetings to the current day. • The To Do option moves active untimed To Do activities to the current day. • The Project option moves active untimed Projects to the current day.
Activity Outcome / Dialer Options	
Disable default Activity Tracking for new activities	When activities are marked as finished in SmartOffice, the user is prompted to record the outcome of the activity (e.g., contact not made, call rescheduled, sale made). To track activities by default (indicated by selecting the Tracked option when creating an activity), leave this option cleared.

Assume all calls are outgoing	This option is related to the SmartOffice auto-dialer, which can automatically dial a contact's phone number (or simply track outgoing and incoming calls, if the user does not use auto-dial). Select this option to track outgoing calls only. This saves a step when using the auto-dialer, because the user will not be prompted to specify whether a call is outgoing or incoming.
Do not navigate to the Contact Detail Page on Phone Dial	To display the contact's details when using the SmartOffice auto-dialer (instead of displaying the calendar or other location from which the auto-dialer is used), leave this option cleared.
Do not show Phone List while using the Dial button	If the auto-dialer is not being used, but there is still a need to time and track calls, select this option.
Activity Outcome Appointment/Call Workflow	This option applies only to tracked activities and controls the options available when a tracked activity is marked complete. Those options include setting activity outcome options, rescheduling the activity (if necessary), and entering SmartPad notes. • The Standard option generates simplified call outcome options. • The Comprehensive option opens a step-by-step detailed workflow when the activity is completed.

User Preferences – Policies/Investments

The Policies/Investments content link enables the user to specify which policy and investment types are available in SmartOffice. To access Policies/Investments preferences:

1. Select **Settings** from the Global Hyperlinks.
2. Click the **Policies/Investments** content link.
3. Tag the appropriate policy, group policy, and investment types.



> **Note**: Policy, Group Policy, and Investment types are visible only to users assigned the appropriate licenses.

User Preferences – Correspondence Options

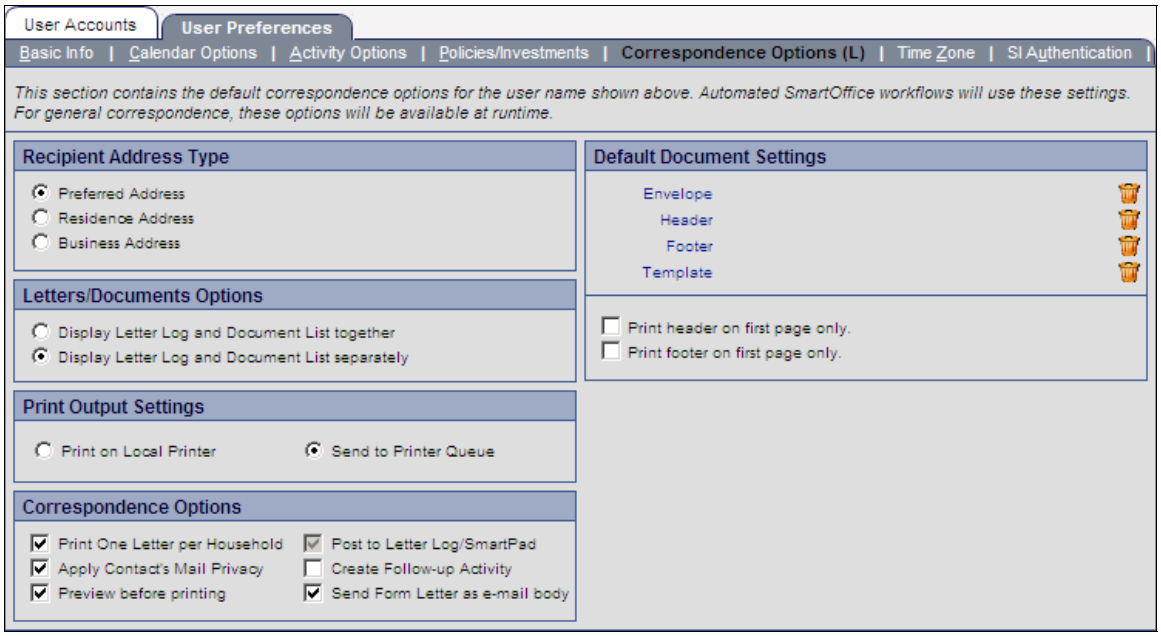
The Correspondence Options content link contains the user's default letter printing and e-mail options for SmartOffice. Automated SmartOffice workflows use these settings; however, the user may override these settings at runtime for general correspondence.

Although these are the default letter printing options in SmartOffice, other printing options may be selected any time a letter is printed.

> **Note:** If the SmartOffice administrator specified Office-level Correspondence Options, some options may not be editable.

To access Correspondence Options:

1. Select **Settings** from the Global Hyperlinks.
2. Click the **Correspondence Options** content link.



Refer to the information in the following table to configure these options.

Recipient Address Type	
Preferred Address, Residence Address, Business Address	To send correspondence to the address listed as a contact's preferred address by default, select Preferred Address (the preferred mailing address is specified for each contact entered in the office, e.g., Residence, Business, Other). To have correspondence addressed to the contact's Residence or Business Address by default, select the appropriate option.
Letters/Documents Options	
Display Letter Log and Document List together	Displays letters created from within SmartOffice and documents uploaded or linked from outside SmartOffice together in one list on the Letters/Documents content link of a Contact.

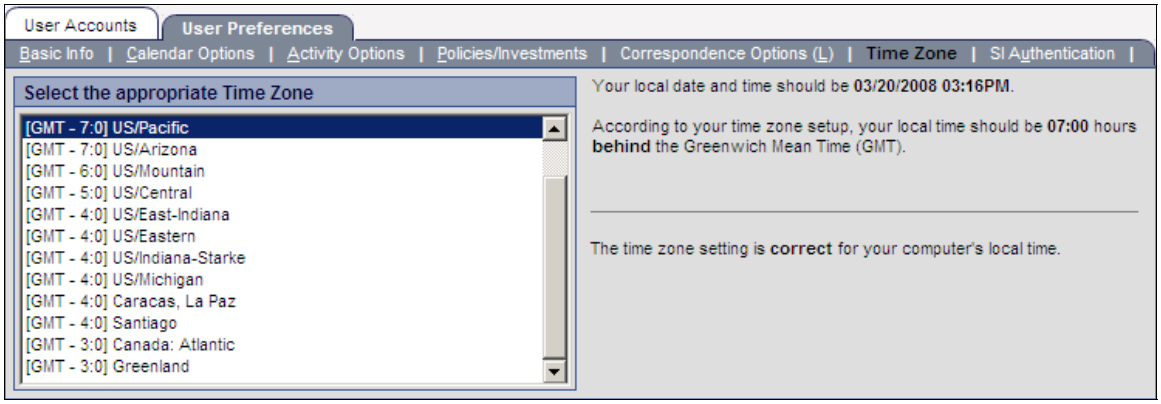
Display Letter Log and Document List separately	Displays letters created from within SmartOffice and documents uploaded or linked from outside SmartOffice in separate lists on the Letters/Documents content link of a Contact.
Print Output Settings	
Print on Local Printer	Select this option if users are responsible for printing their own documents.
Send to Printer Queue	Select this option if administrative staff is responsible for printing documents for most of the users in SmartOffice. Print jobs will be sent to the job queue of the responsible print queue user. This feature enables remote employees to send their print jobs to the main office for printing and mailing purposes.
Correspondence Options	
Print One Letter per Household	Ensures 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's Household tab.
Apply Contact's Mail Privacy	Displays an alert when a contact has requested not to be contacted using the selected method of correspondence.
Preview before printing	Automatically expands merge codes and opens a print preview before sending the document to the local printer or SmartOffice printer queue.
Post to Letter Log/SmartPad	Saves all letters and envelopes generated and printed from SmartOffice to each selected contact's Letter Log, and posts an entry to the SmartPad noting that the document was printed.
Create Follow-up Activity	Prompts the user to create a follow-up activity for every letter sent from SmartOffice.

Send Form Letter as e-mail body	Inserts the text of the form letter in the body of the e-mail message as opposed to sending the letter as an e-mail attachment.
Default Document Settings	
Envelope, Header, Footer, Template	Specify a default envelope, document header, footer, and/or letter template for creating correspondence. These options enable the user to maintain a consistent appearance for all correspondence. This option may not apply to pre-printed stationery. Click the appropriate link to select from created documents or to add a document. **Note**: Envelopes, headers, footers, and letter templates are accessible from the side menu by clicking **Setup** and selecting **Document Administration** from the expanded list of options.
Print header on first page only **Print footer on first page only**	To print the header and/or footer on the first page only, select the appropriate option.

User Preferences – Time Zone

The Time Zone content link enables the user to specify the default time zone:

1. Select **Settings** from the Global Hyperlinks.
2. Click the **Time Zone** content link.
3. Select the appropriate time zone.



Training Options

Successful business professionals 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, careful attention must be given to learning proper use of the system. Ensuring that staff members receive the training they need to effectively perform their job functions is essential.

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

- **SmartOffice Orientation:** How to navigate SmartOffice, access additional resources, select contacts, view data (notes, letters, activities, policies, etc.), and mine data for marketing purposes.
- **Contact Management:** How to view and edit contact information, customize field choices, add contacts to a set, establish key relationships, use advanced selection options, and run contact reports.
- **Activity Management:** 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.
- **Contact Correspondence:** How to use Microsoft 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.
- **Data Mining:** 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 SmartOffice.

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

When Should Training Begin?

Training should begin as soon as E-Z Data has created an office for the organization and the administrator has completed office and user setup.

If data is being converted from another system, training should begin as soon as that data has been submitted for trial conversion. Once the trial conversion is completed, there will be a 10-day User Acceptance Testing (UAT) period during which the organization must review the converted data for accuracy and completeness. This review will be difficult to carry out in a timely manner if users are not already familiar with the system.

After signing off on the UAT, the organization resubmits the data for final conversion. Once converted, the data is loaded into the organization's SmartOffice office and is ready for use. By completing training prior to this time, all users will be up and running quickly.

Training Delivery Methods

E-Z Data's 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

E-Z Data offers a comprehensive series of online video training courses that are available at no charge. 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 a business' practice.

Each course is broken down into a series of lessons and Fast Classes. Lessons cover the fundamentals of SmartOffice, while Fast Classes offer training on advanced tools and functionality not covered in the basic lessons. Every other week, a new Fast Class arrives by e-mail. Each Fast Class is generally less than 10 minutes long.

Combined, the lessons and Fast Classes provide comprehensive "nuts and bolts" training and make it possible to:

- "Attend" training classes anywhere there is an Internet connection.
- View entire classes or specific lessons.
- 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.

E-Z Data recommends that all SmartOffice users view all of the online videos as a prerequisite to using SmartOffice or scheduling Web-based or live training. To access these videos:

1. Log into SmartOffice.
2. Position the mouse pointer over **Help/Training** in the Global Hyperlinks and then select **Training** from the expanded list of options.
3. Click either the **Training Movies** or **Fast Classes** hyperlink.

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 videos 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.

The live Web-based session rate is $200/hour and applies to preparation time for customized sessions as well actual instruction time. Training can be carried out using the customer's Web meeting and audio conferencing facilities or E-Z Data's facilities.

On-Site Training

An E-Z Data trainer can conduct a group training session at the customer site for all 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, staff members are free from routine distractions (phone calls, e-mail, etc.) and can completely focus on the material presented.

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

Customers may also elect to send one or more staff members for training at E-Z Data's Pasadena, California, headquarters. One benefit of this approach is that staff members will receive more individualized, intensive training than is possible with a larger group. In addition, product experts can be brought in to assist with advanced topics, if necessary. After completing their training, those staff members can then serve as in-house E-Z Data solution experts for their organization and serve as invaluable resources to the success of the organization's project.

On-site training rates are $1500/day ($600 travel day fee), plus 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@ezdata.com.

Technical Support

Each office (one or multiple locations) with 50 or fewer users may specify up to two technical support coordinators to interface with E-Z Data's support department. One additional technical support coordinator may be added for each additional 25 users. Naming support contacts in this way streamlines the support process by providing the organization a common point of contact for staff members and E-Z Data's technical support staff.

E-Z Data's experienced and professional help desk staff members are just a phone call or e-mail away. This group's sole mission is to help customers put SmartOffice to work in their practices. From providing general guidance to answering involved questions, E-Z Data's help desk staff is happy to help.

The technical support group can be contacted using one of the methods below.

E-mail **support@ezdata.com**	• Great option for non-critical issues • Be sure to include the registered user's name in the body of the e-mail • Please provide a complete description of the problem • 24-hour turnaround
Telephone **(626) 585-3515**	• Support center hours of operation: o 7am to 5pm PST Monday – Thursday o 7am to 1:30pm PST Friday

Additional Resources

- For immediate assistance, try SmartOffice's robust help system. Position the mouse pointer over **Help/Training** in the Global Hyperlinks and select from the menu, which includes access to the SmartOffice Help System, downloadable User Guides, and more.
- Sign into E-Z Data's User Forum to share thoughts, ideas, and questions with other SmartOffice users: www.ez-data.com/ezcommunity/

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