

SmartOffice®

Version 7 User Guide

PRODUCT OVERVIEW



Getting Started

SmartOffice® v7, Revised: 09-13-10

Copyright © 2010, Ebix CRM

All Rights Reserved.

No part of this documentation may be copied, reproduced or translated in any form without the prior written consent of Ebix CRM.

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



Ebix CRM

918 E. Green Street

Pasadena, CA 91106

Web: www.ezdata.com

Telephone: (626) 585-3505

Fax: (626) 440-9097

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

Table of Contents

Introduction	1
SmartAnalyzer	2
Signing In to SmartOffice	4
Signing In for the First Time	4
Signing In After the First Time	6
Adding SmartOffice to the Browser Favorites List	7
Signing Out of SmartOffice	8
General Navigation	9
Quick Action Corner	9
Side Menu	10
Navigate Tab	10
History Tab	11
Search Section	11
Search	12
Detailed Search	12
New	12
Search Section Tips	12
Global Hyperlinks	13
Custom Button Bar	13
Menu Button	14
Tabs and Content Links	14
Main Content Area	15
SmartOffice Download Manager	16
SmartOffice Utilities	21
Requirements	22
Installing SmartOffice Utilities	22
Correspondence	23
Sending a Letter	23
Correspondence Menu	24
SmartLink for Word	25
Overview	25
SmartOffice Buttons in Word	25
Composing a Letter in Word	27

SmartMail E-mail Posting	30
Posting E-mail Messages from SmartOffice	30
Posting E-mail Messages from Outlook.....	32
Existing Messages	32
New Messages	33
Intra-Office E-mail	34
User Preferences.....	35
User Preferences - Basic Info.....	35
General Information Section	35
Password Reminder Section	36
Cross Office Record Sharing Section.....	36
User Preferences Default Settings Section	36
Alert/Notification Settings Outside of SmartOffice Section	37
My Favorite User List Section.....	38
User Preferences - Calendar Options	38
Calendar Options	39
Activity Details Displayed in Calendar Week and Month	39
Do Not Display.....	39
Week View Options	39
Quick Action Corner Button Selection.....	40
Calendar Display Section	40
User Preferences - Activity Options.....	41
Default Activity/Task Creation Options.....	41
Task AutoMove/Unfinished Activities.....	43
Activity Outcome/Dialer Options.....	43
Activity Confirmation Letter Settings	44
User Preferences - Policies/Investments	44
User Preferences - Correspondence Options.....	45
Recipient Address Type Section.....	45
Letters/Documents Options Section	45
Print Output Settings Section	46
Correspondence Options Section.....	46
Default Document Settings Section.....	46
Word Processor Selection Section.....	47
E-mail Attachment Options Section.....	47

User Preferences - Time Zone.....	47
User Preferences - Sign-In Events.....	48
User Preferences - Alert Center.....	49
Follow-Up Designation Section	49
Reading Pane Section	49
New Alert Notification Section	49
SmartOffice Alerts Section.....	50
SmartOffice Training	51
Overview	51
When Should Training Begin?	51
Training Delivery Methods	52
Online Training Videos	52
Free Live Training Classes	52
Live Web-Based Sessions	53
On-Site Training	53
Contact Information	53
Technical Support Information.....	54

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.

SmartAnalyzer

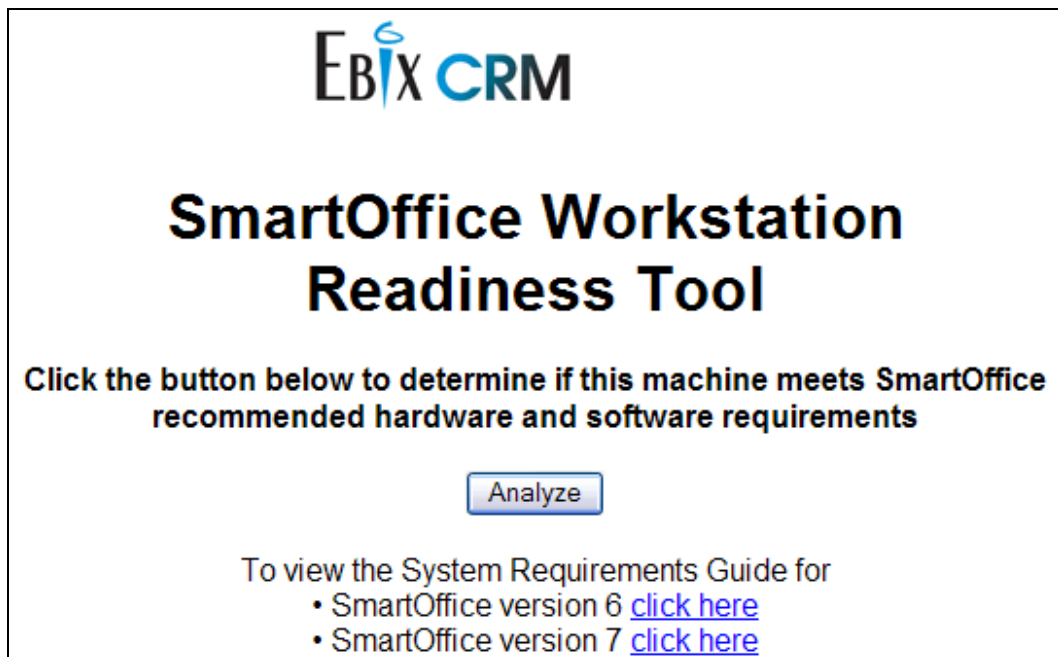
SmartAnalyzer is a tool that examines a user's computer to ensure that it meets the minimum hardware and software requirements to run SmartOffice.

Ebix CRM highly recommends that users run SmartAnalyzer before [signing in to SmartOffice](#) for the first time.

As part of its analysis, SmartAnalyzer creates a report and offers to automatically configure the user's browser settings.

To run SmartAnalyzer:

1. [Visit the SmartAnalyzer Web site](#) or click the **Optimize your configuration settings** hyperlink on the [SmartOffice sign-in](#) page. The SmartAnalyzer page displays.



The screenshot shows the SmartAnalyzer interface. At the top is the EBIX CRM logo. Below it is the title "SmartOffice Workstation Readiness Tool". A central instruction reads: "Click the button below to determine if this machine meets SmartOffice recommended hardware and software requirements". Below this is a blue "Analyze" button. At the bottom, there is a link to view the System Requirements Guide for SmartOffice version 6 and version 7.

2. Click the **Analyze** button to display the report.

Operating System Microsoft Windows XP Professional Service Pack 3	Microsoft .Net Framework Version 2.0 50727-50727 c:\WINDOWS\Microsoft.NET\Framework\
System Memory Total Physical Memory: 2031 MB Total Hard Disk Space: 111 GB	Microsoft Office Version Office 2007 (Build: 12.0.6425.1000) Word C:\Program Files\Microsoft Office\Office12\winword.exe (Build 12.0.6535) Excel C:\Program Files\Microsoft Office\Office12\excel.exe (Build 12.0.6535) Outlook C:\Program Files\Microsoft Office\Office12\outlook.exe (Build 12.0.6535)
Processor Intel(R) Core(TM)2 Duo CPU T9300 @ 2.50GHz	Microsoft Data Access Component (MDAC) MDAC Component Version 2.81.1132.0
Monitor Resolution Monitor Resolution: 1680 x 1050	IBM Lotus Notes <i>Lotus Notes is not installed</i> (If you do not plan to integrate Lotus Notes with SmartOffice, please disregard this entry)

Note: If Internet Explorer displays a notification that it has restricted the Web page from running ActiveX controls, click the notification and select **Allow Blocked Content** from the expanded menu. When the security warning dialog box opens, click the **Yes** button.

3. Examine the report for information about incompatibilities (displayed in red).
4. To automatically correct Internet Explorer configuration issues, click the **Fix now** button at the bottom of the report.
5. (Optional) Click the **E-mail report** button at the bottom of the report to sent the report as an e-mail attachment.

Signing In to SmartOffice

Signing In for the First Time

Note: Ebix CRM highly recommends that users run the [SmartAnalyzer](#) tool before signing in for the first time. The tool ensures that the user's Web browser settings are optimized for SmartOffice.

When the SmartOffice administrator creates an account for a user, the user receives a series of e-mail messages containing the sign-in URL, office name, user name and password.

Refer to that information to complete the following steps:

1. Click the sign-in hyperlink to access the SmartOffice Sign-In page.

The screenshot shows the SmartOffice Sign-In page. At the top, there is the Ebix CRM logo and navigation links. The main heading is "SmartOffice sign in" with sub-headings for "PRACTICE MANAGEMENT", "AGENCY MANAGEMENT", and "CLIENT RELATIONSHIP MANAGEMENT". The page content includes a "what's new" section with a "Recommend your products with confidence!" message, a "training & support" section with links to fast classes and live training, and a sign-in form on the right with fields for Office, User Name, and Password, a "Remember me" checkbox, and a "Sign In" button. Below the form are links for "Sign In Problems?", "Forgot Password?", "Security and Disaster Recovery Commitments", and "Follow us on Twitter".

2. Complete the Office, User Name and Password fields.
3. (Optional) Select the **Remember Me** option to have the sign-in page automatically fill in the office name and user name information for future sign-ins. For security reasons, the password must be entered at every sign-in.
4. Click the **Sign In** button.

5. If prompted to run the [SmartOffice Download Manager](#) (SODownloadManager.exe), do one of the following:
 - Click the **Run** button and follow the instructions to install the Download Manager.
 - Click the **Cancel** button to install the Download Manager at a later time.
6. When the Change Password dialog box opens, review the instructions.

Change Password

Reason: Change your Temporary Password.
Password Restrictions:
Must be at least 6 characters long.
Must be Alphanumeric with at least one Number and one Alpha character.
Must not be the same as the User Name.

Enter New Password

Current Password

Type New Password

Retype New Password

Please enter a Question and Answer that SmartOffice will ask you in the event that you forget your password.
Note: These can be changed later from the User Preferences section.

Password Reminder

Enter a password reminder question.

Question

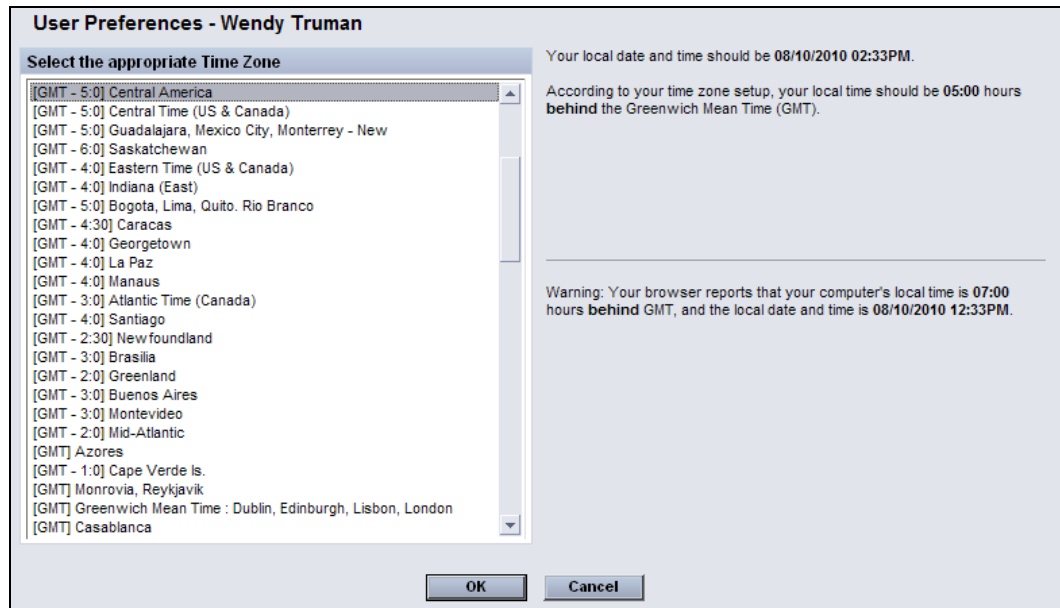
Replace the asterisks with your password answer. Please do not use asterisks in your answer.

Answer

Change

5. In the Current Password field, enter the password from the e-mail message.
6. In the Type New Password field, enter a new password. Follow the password guidelines and restrictions listed at the top of the dialog box.
7. In the Retype New Password field, retype the new password exactly as it was entered in the Type New Password field.
8. In the Question and Answer fields, enter a password reminder question and answer. This question enables the user to access the system if the user forgets his/her password. The question and answer can be changed anytime in [User Preferences - Basic Info](#); see that topic for guidelines about choosing a good password question and answer.
9. Click the **Change** button.

10. If prompted, select the appropriate time zone in the dialog box that opens.



The time zone preference can be changed anytime in [User Preferences - Time Zone](#); see that topic for more information about selecting a time zone.

11. Click the **OK** button to display the SmartOffice home page.

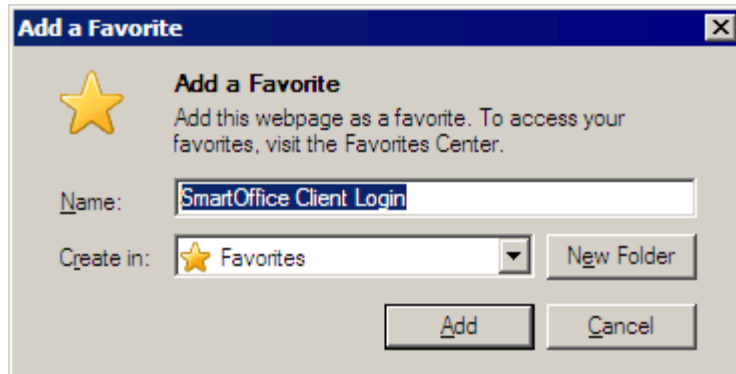
Singing In After the First Time

1. Open Internet Explorer.
2. Do one of the following:
 - o If SmartOffice has been saved as a Favorite, select the favorite from the Internet Explorer **Favorites** menu.
 - o If SmartOffice has not been saved as a Favorite, enter the SmartOffice URL (refer to the e-mail message containing the SmartOffice sign-in URL, or ask the SmartOffice administrator).
3. When the SmartOffice sign-in page displays, enter the appropriate office name, user name and password.
4. (Optional) Select the **Remember Me** option to have the sign-in page automatically fill in the office name and user name information for future sign-ins. For security reasons, the password must be entered at every sign-in.

Adding SmartOffice to the Browser Favorites List

After [signing in to SmartOffice](#), the user can add SmartOffice to Internet Explorer's Favorites list for quick access to the sign-in 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 sign in to SmartOffice in the future, open Internet Explorer, click the **Favorites** menu and then select the favorite created in step 2.

Note: To bookmark specific SmartOffice pages, use the History tab on the [side menu](#).

Signing Out of SmartOffice

Important: To sign out of SmartOffice, do not simply close the browser window. This can cause unexpected behavior during subsequent sign-ins.

Follow these steps to properly sign out of SmartOffice:

1. From the Global Hyperlinks section in the top-right corner of SmartOffice, click the **Sign out** hyperlink.

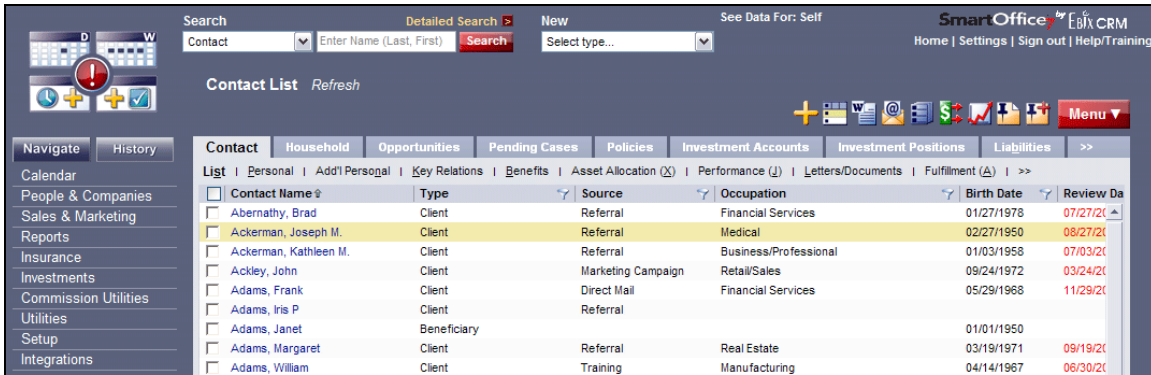
[Home](#) | [Settings](#) | [Sign out](#) | [Help/Training](#)

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



General Navigation

The main navigation features of SmartOffice are located across the top and down the left side.



Quick Action Corner

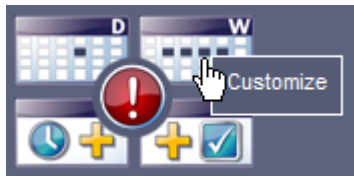


The Quick Action Corner in the upper left corner of SmartOffice provides instant access to the Alert Center and the Calendar Day and Calendar Week views, as well as buttons for calendar activity and task creation.

Position the mouse pointer over a button to see its function.

The buttons in the Quick Action Corner can be changed to open other calendar views and SmartOffice features. See [User Preferences - Calendar Options](#).

Note: A quick way to customize the Quick Action Corner is to right-click either of the buttons and select **Customize** from the menu that displays.



Side Menu

The side menu runs along the left side of the SmartOffice window, directly below the [Quick Action Corner](#). The menu contains two tabs: Navigate and History.

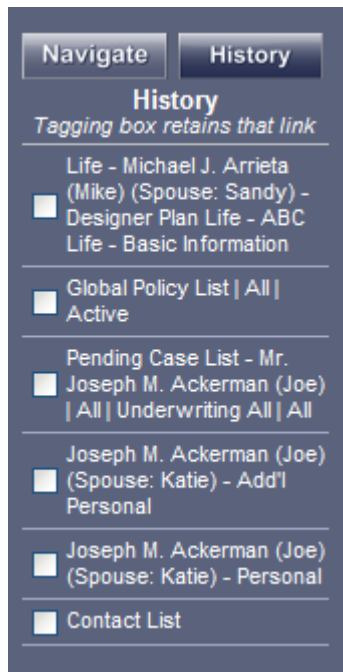
Navigate Tab



Click this tab to access various modules and areas of SmartOffice (e.g., Calendar, People & Companies, Sales & Marketing). Clicking a hyperlink displays an expanded list of options related to the 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

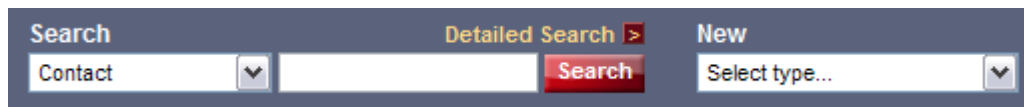


Clicking the **History** tab displays links to the last 10 SmartOffice pages the user visited. To navigate to a previous SmartOffice page, click a hyperlink in the History tab instead of clicking the browser's Back button.

This list is cleared after the user signs out. To retain an item between SmartOffice sessions, select its check box. This is a good way to “bookmark” frequently visited areas of SmartOffice.

Search Section

This portion of SmartOffice includes the Search, Detailed Search and New fields at the top of each page.

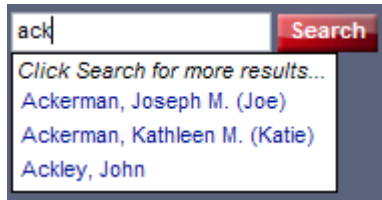


Use the Search section to reduce the amount of time and the number of steps required to create or search for records.

Search

Use this method for the quickest search results.

1. Click the Search drop-down list and then select a record type from the expanded list.
2. Do one of the following:
 - o Enter any specific search criteria in the Search field. As the user types, any matching records automatically display in a dynamic menu.



If the record displays in the menu, select it to open it. Otherwise, click the Search button to see a full list of search results.

- o Leave the field blank and click the **Search** button to return all records of the selected type.

Detailed Search

Use this search method to conduct detailed searches using additional criteria, such as phone numbers, e-mail addresses and ZIP Codes.

1. Click the **Search** drop-down list and then select a record type from the expanded list.
2. Click the **Detailed Search** hyperlink to open the Search dialog box for that record type.
3. Enter the appropriate search criteria and then click the **Search** button.

New

Use this menu to quickly create new contacts, policies and other SmartOffice record types.

1. Click the **New** drop-down arrow to expand the Select Type list.
2. Select a record type. The New dialog box for the selected record type opens.

Search Section Tips

- Enter last names first, and separate first names by a comma.
- Enter the first letter, or the first few letters, of a last name to broaden the search.
- When a Contact or Business name is not found, the user is prompted to create a new record.

Global Hyperlinks

The Global Hyperlinks are located in the upper right corner of SmartOffice.

[Home](#) | [Settings](#) | [Sign out](#) | [Help/Training](#)

The hyperlinks are as follows:

- **Home:** Return to the SmartOffice home page.
- **Settings:** Access [User Preferences](#) (e.g., Activity/Calendar Options and Correspondence Options).
- **Sign Out:** End the current SmartOffice session. Use this hyperlink to end a SmartOffice session; do not close the browser window. See [Signing Out of SmartOffice](#).
- **Help/Training:** Access SmartOffice Help, User Guides, Training Movies and Fast Classes. This hyperlink also points to information about purchasing additional SmartOffice modules and suggesting improvements to SmartOffice.

Custom Button Bar

The Custom Button Bar is located next to the [Menu button](#) at the top of a record or list of records. It offers quick access to common features related to that record type.



All of the buttons in the Custom Button Bar are also available as options under the Menu button. The user can drag commonly used options from the Menu onto the button bar for faster access.

To add a button to the bar:

1. Click the **Menu** button to display an expanded list of options.
2. Click and drag a Menu option onto the Custom Button Bar.

To remove a button from the bar, use either of these methods:

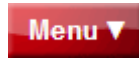
- Click and drag the button from the button bar and drop it onto the **Menu** button.
- Right-click the button and select **Remove from Bar** from the shortcut menu.

To reset the bar to its default set of buttons, right-click any button and select **Reset Buttons to SmartOffice Defaults** from the shortcut menu.

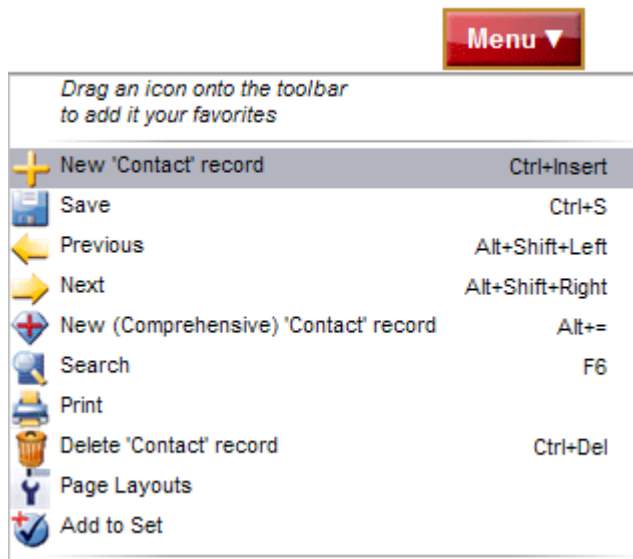
The order of the buttons can also be changed by clicking and dragging them to a different position.

Menu Button

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



Click this button for an expanded list of options.



The options vary depending on the area of SmartOffice in which the user is working and the user rights and licenses assigned to the user by the administrator.

Click and drag frequently used options from this menu to the [Custom Button Bar](#) to make those options quickly accessible.

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 Contact, while the content links related to that tab are List, Personal, Add'l Personal, Key Relations, Benefits and so on.



When the user's browser window is not wide enough to display all available tabs or content links, a double chevron (>>) displays on the right side of the tab or content link row. Click the double chevron to select hidden tabs or content links.

Main Content Area

The main content area of SmartOffice, located under the [tabs and content links](#), displays the details of individual records (e.g., contacts and businesses) or lists of records.

Individual Record

Personal Information				Phone Numbers			
Last Name	Ackerman	Suffix		<input type="checkbox"/> Phone Type	Full Phone	Remarks	
First Name	Joseph	Middle	M.	<input type="checkbox"/> Business	(626) 987-7288		
Greeting	Joe	Title	Mr.	<input type="checkbox"/> Business	(310) 309-0948 # 152		
Type	Client	Sub-Type	A	<input type="checkbox"/> Residence	(626) 799-2951		
Source	Referral			<input type="checkbox"/> Mobile	(213) 577-0337		
Sub-Source				Addresses			
Referred By	Randall Halverson			<input type="checkbox"/> Address Type	Complete Address	Map	
Birth Date	02/27/1950	Age	60	<input type="checkbox"/> Business	987 E. 21st Street Los Angeles, CA 90024		
Marital Status	Married	Gender	Male	<input type="checkbox"/> Residence	488 S. Oakland Avenue		
Review Date	08/27/2008	# of Child	2	E-mail/Web Addresses			
Primary Advisor	Philip Anderson	SS #	xxx-xx-8750	<input type="checkbox"/> Type	Address		
Business Information				<input type="checkbox"/> E-mail	jackerman@bobbis.com		
Company	Joseph M. Ackerman, M.D., Inc.			Remarks			
Occupation	Medical						
Job Title	Chief Of Staff						
Family Information							
Spouse Kathleen M. Ackerman (Katie) 01/03/1958 (52) Business/Professional, Hibbell							
Son Kenneth 04/15/1990 (20)							
Daughter Marianne 12/12/1985 (24)							

List

<input type="checkbox"/> Contact Name	Type	Source	Occupation	Birth Date	Review Date
<input type="checkbox"/> Abernathy, Brad	Client	Referral	Financial Services	01/27/1978	07/27/2008
<input type="checkbox"/> Ackerman, Joseph M.	Client	Referral	Medical	02/27/1950	08/27/2008
<input type="checkbox"/> Ackerman, Kathleen M.	Client	Referral	Business/Professional	01/03/1958	07/03/2008
<input type="checkbox"/> Ackley, John	Client	Marketing Campaign	Retail/Sales	09/24/1972	03/24/2008
<input type="checkbox"/> Adams, Frank	Client	Direct Mail	Financial Services	05/29/1968	11/29/2008
<input type="checkbox"/> Adams, Iris P	Client	Referral			
<input type="checkbox"/> Adams, Janet	Beneficiary			01/01/1950	
<input type="checkbox"/> Adams, Margaret	Client	Referral	Real Estate	03/19/1971	09/19/2008
<input type="checkbox"/> Adams, William	Client	Training	Manufacturing	04/14/1967	06/30/2008
<input type="checkbox"/> Adcock, Martin	Client	Referral	Manufacturing	01/11/1963	03/14/2008
<input type="checkbox"/> Albano, Joyce V	Lead			01/15/1928	

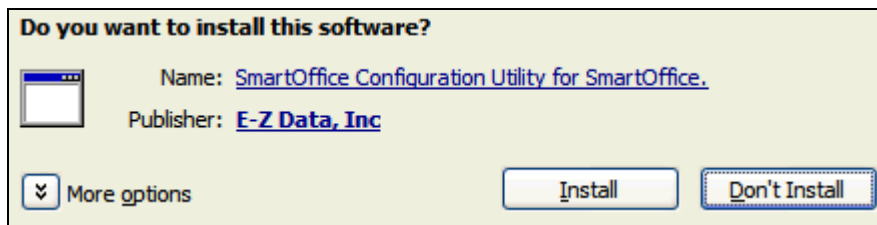
SmartOffice Download Manager

The Download Manager downloads and installs important Ebix CRM software on the user's computer, such as [SmartOffice Utilities](#).

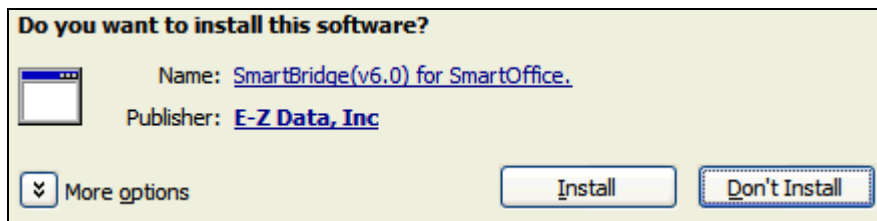
The Download Manager also delivers software updates automatically when the user needs those updates to perform tasks in SmartOffice.

To install the Download Manager:

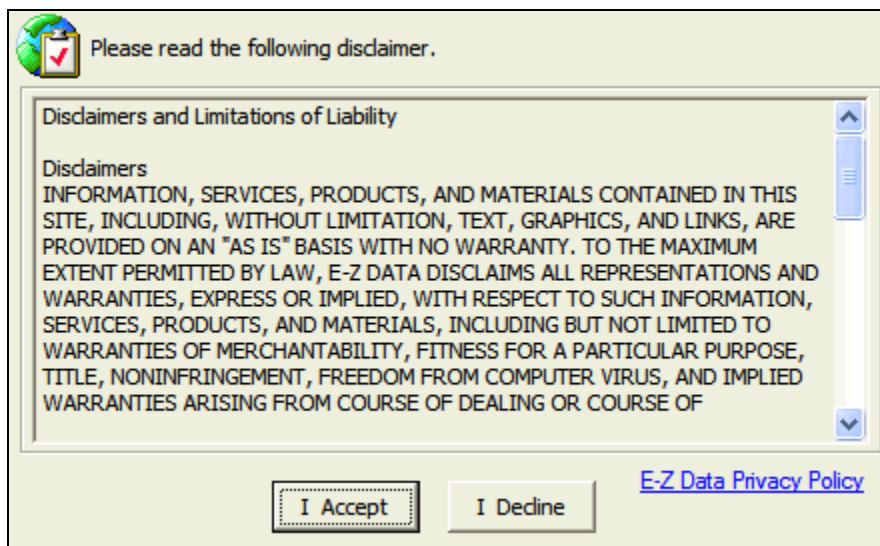
1. [Sign in to SmartOffice](#).
2. If this is the first time accessing SmartOffice, the following confirmation message displays.



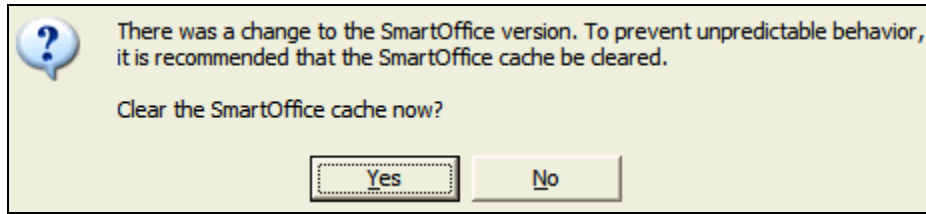
3. Click the **Install** button. The following confirmation message displays.



4. Click the **Install** button to open the SmartOffice Configuration Tool dialog box.



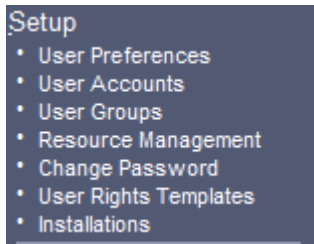
5. Click the **I Accept** button to open the SmartOffice Configuration Settings dialog box.



6. Click the **Yes** button to clear the Internet Explorer cache.

Note: If the SmartOffice URL is not in the pop-up blocker's Allow Pop-ups list, another prompt to add this will display.

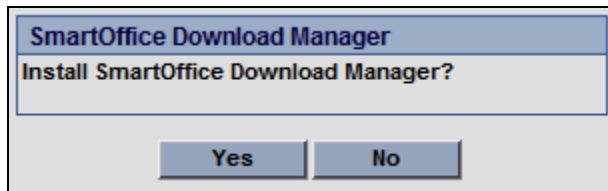
8. Once signed in to SmartOffice, from the side menu, click **Setup** and then select **Installations** from the expanded menu.



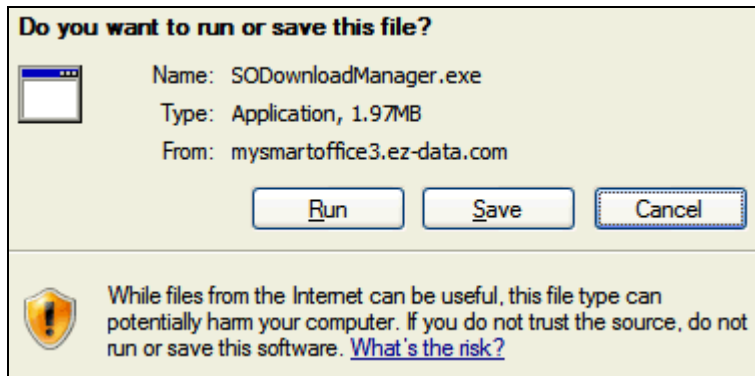
9. From the Installations page, click the **SmartOffice Download Manager** hyperlink.

Installations	
Download	Description
SmartOffice Download Manager	Simplifies the SmartOffice component installation process by managing updates and prompting the user to upgrade only when necessary.
SmartOffice Sync for Outlook	Enables SmartOffice contacts and activities to synchronize with Microsoft Outlook.
SmartOffice Utilities	This installation includes: 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

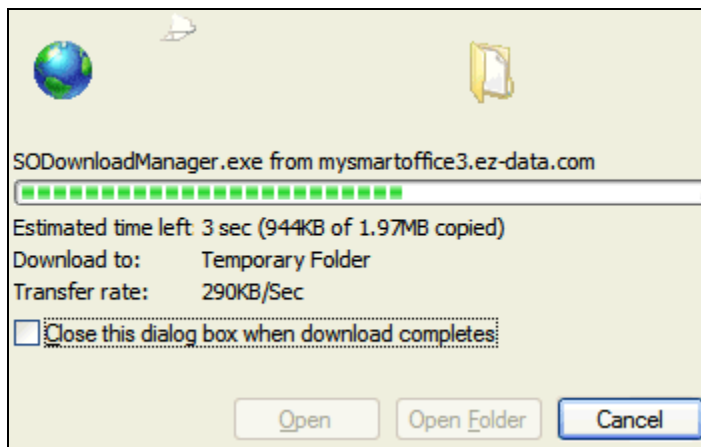
10. Click the **Yes** button on the SmartOffice Download Manager confirmation dialog box.



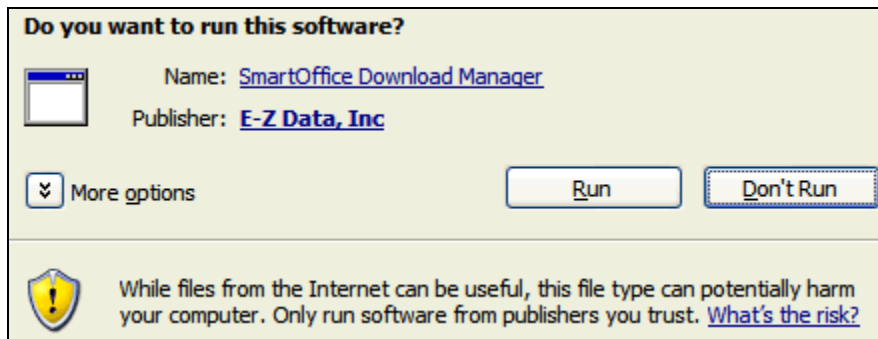
11. The following Security Warning displays.



12. Click the **Run** button to begin the **SmartOffice Download Manager** download process.



13. Once the progress bar completes, the following confirmation message displays.



- Click the **Run** button to open the SmartOffice Client Authentication dialog box.

SmartOffice Client Integration requires password authentication.
Please enter your SmartOffice Password.

Office Name:

User Name:

Password:

Remember password


OK Cancel

- Enter the SmartOffice password in the above dialog box and then click the **OK** button to open the SmartOffice Download Manager dialog box.

[Update Information](#)

The list below shows the SmartOffice applications available for download.
Please select the application(s) you wish to update, and click "Download & Install". Click "Exit" to close the program and run the update later.

[Applications Available For Download](#)



SmartOffice Utilities
This installation includes:
 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 lists from SmartOffice to Excel
 SmartLink for Windows Explorer - Post files from your local computer to the SmartPad
 SmartOffice Folder Watch - Monitor designated folders on your computer and automatically upload newly added files to the Letters/Documents area of a Contact
 SmartAlerts - Receive system tray notifications of alerts from SmartOffice.
 Smartlink for Adobe PDF - Print Preview for Spreadsheets and Reports

Latest Installation

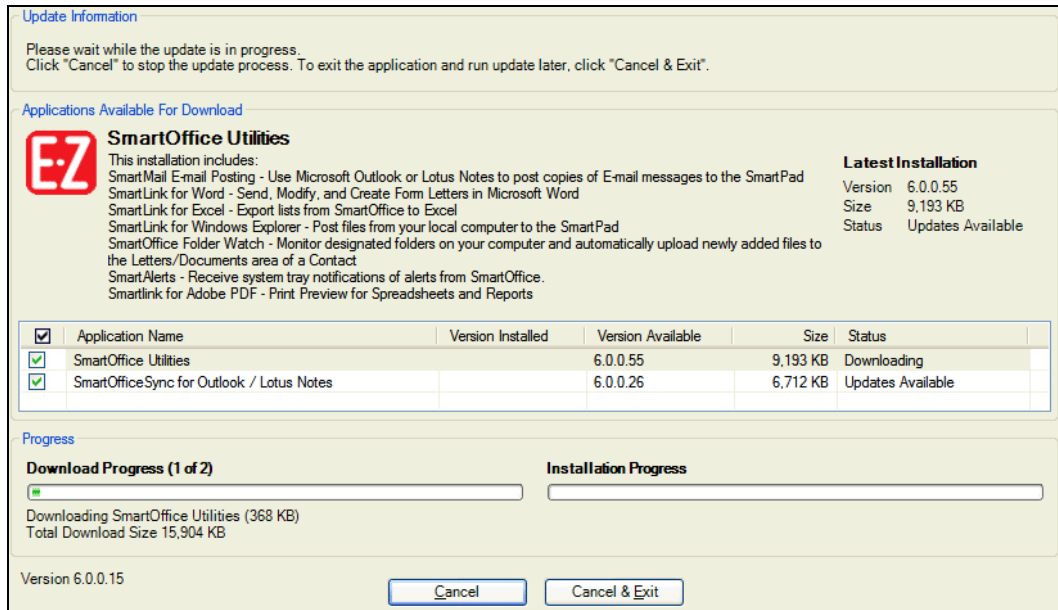
Version	6.0.0.55
Size	9,193 KB
Status	Updates Available

<input type="checkbox"/>	Application Name	Version Installed	Version Available	Size	Status
<input checked="" type="checkbox"/>	SmartOffice Utilities		6.0.0.55	9,193 KB	Updates Available
<input type="checkbox"/>	SmartOfficeSync for Outlook / Lotus Notes		6.0.0.26	6,712 KB	Updates Available

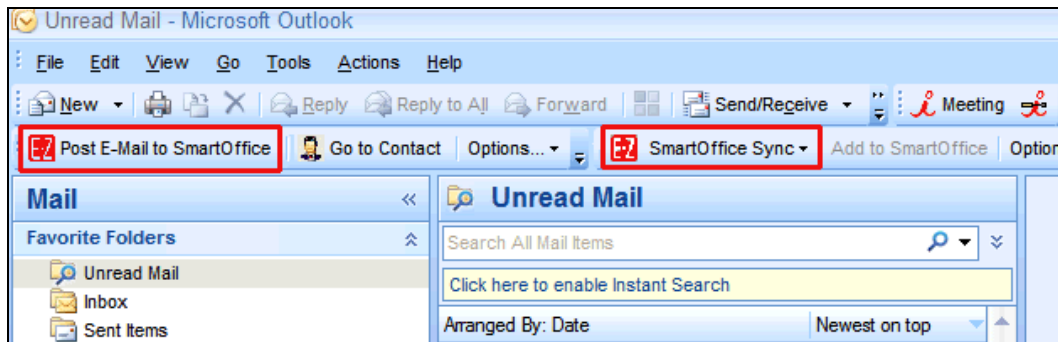
Version 6.0.0.15
[View Log](#)

Download & Install Exit

16. Select the components from the list for installation and then click the **Download & Install** button to begin the download process.



17. After the download is complete, the Installation Wizard for each of the selected items is displayed. Click through the options on each step of the wizard to complete the installation.
18. Once all of the downloaded applications have been installed, the Download Manager will minimize to the system tray so that the user can continue working in SmartOffice with the updated applications.
19. The component toolbars as outlined below are now available (e.g., in MS Outlook).



SmartOffice Utilities

SmartOffice Utilities is a collection of programs that integrate SmartOffice seamlessly with Windows, Microsoft Office and other commonly used office software.

The following utilities are available:

- 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 letters using Microsoft Word.
- SmartLink for Excel: Export list data from SmartOffice to Excel.
- SmartLink for Windows Explorer: Post files from the local computer to the SmartPad.
- SmartOffice Folder Watch: Monitor designated local folders and automatically upload newly added files to the Letters/Documents area of a contact.
- SmartAlerts: Receive notifications of alerts from SmartOffice in the Windows system tray.
- SmartLink for Adobe PDF: Export lists and reports to PDF format.
- SmartLink for Labels: Use a DYMO label maker to make labels for your contacts.
- SmartLink for Quik! Forms: Fill out forms quickly with SmartOffice contact data and Quik! Forms.

Requirements

To ensure the proper operation of SmartOffice Utilities:

- Run [SmartAnalyzer](#).
- Ensure that the following user rights are enabled on the User Accounts - User Rights Content Link (only a user with administrator rights can change these settings):
 - SmartMail for Outlook E-mail (if the user will be using Outlook and SmartMail E-mail Posting)
 - SmartMail for Lotus Notes E-mail Posting (if the user will be using Lotus Notes and SmartMail E-mail Posting)
 - Data Export (if the user will be using SmartLink for Excel)

Note: SmartOffice Utilities work only with Microsoft Office 2003 and higher. To use the e-mail posting feature, Outlook 2003 or higher is required. If Outlook is not configured to send and receive e-mail, contact the organization's Internet Service Provider (ISP) or IT support team.

Installing SmartOffice Utilities

SmartOffice Utilities are installed using the SmartOffice Download Manager. For information about installing and using the Download Manager, see [SmartOffice Download Manager](#).


Correspondence

SmartOffice's built-in correspondence features enable users to create and send e-mail messages, letters, form letters, faxes, labels, envelopes and mass correspondence.

SmartOffice includes a number of form letter templates for creating and sending correspondence, and users can create their own templates.

Sending a Letter

The basic procedure for sending a letter in SmartOffice is as follows:

1. Select one or more records (e.g., contacts, businesses, pending cases, policies) from any list, or open a record.
2. Click the **Correspondence** button  in the [Custom Button Bar](#) or press **F10**. If the required [SmartOffice Utilities](#) are not installed, the system prompts the user to install them.
3. If the record has more than one contact associated with it, a dialog box opens, prompting the user to select the recipients. For example, if the user clicks the Correspondence button while viewing a policy, the system gives the user the option to select the policy's primary contact, primary insured, owner, carrier and other related contacts.
4. Follow the steps in the Correspondence Wizard to complete the letter-sending process.

Correspondence Menu

On some lists and records, the user can position the mouse pointer over the Correspondence button to display a correspondence menu.



This menu features the following options:

- **Recent Correspondence:** Recently used form letter templates are listed in this section of the menu. To send a new letter using that template, click its hyperlink. The Correspondence Wizard opens with that template pre-selected.
- **Launch Correspondence Wizard:** This option opens the Correspondence Wizard as if the user clicked the Correspondence button.
- **Launch Word:** Select this option to write a letter that is not based on an existing template. A blank document opens in Word or in the SmartOffice Letter Editor, depending on the user's settings in [User Preferences - Correspondence Options](#). For information about using Word to compose letters, see [SmartLink for Word](#).
- **Launch E-mail:** Select this option to open a blank e-mail message addressed to the contact.

SmartLink for Word

Overview

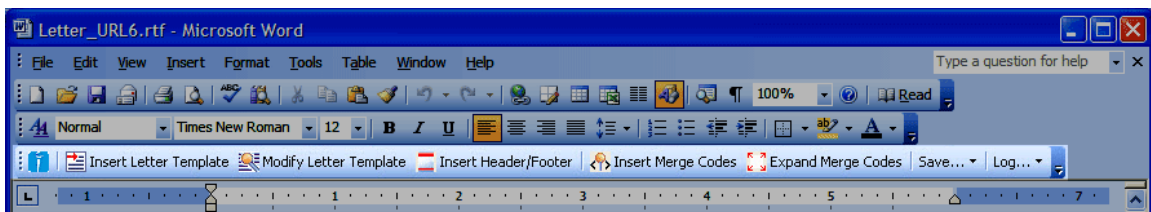
SmartLink for Word enables users to create letters in SmartOffice using Microsoft Word.

SmartLink for Word is included in [SmartOffice Utilities](#). To install SmartOffice Utilities, use the [SmartOffice Download Manager](#).

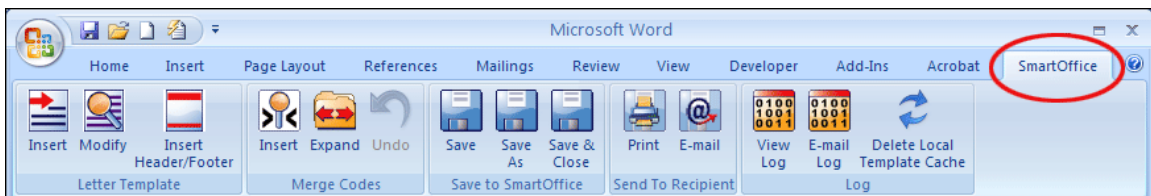
SmartOffice Buttons in Word

When SmartLink for Word is successfully installed, SmartOffice buttons become available in Word. The location of those buttons depends on the version of Word being used.

In Word 2003, the buttons are available in a toolbar.



In Word 2007, the buttons are located in the SmartOffice tab on the Ribbon.



Note: Once SmartOffice Utilities are installed, the SmartOffice buttons are always present in Word. This enables the user to start writing letters directly from Word.

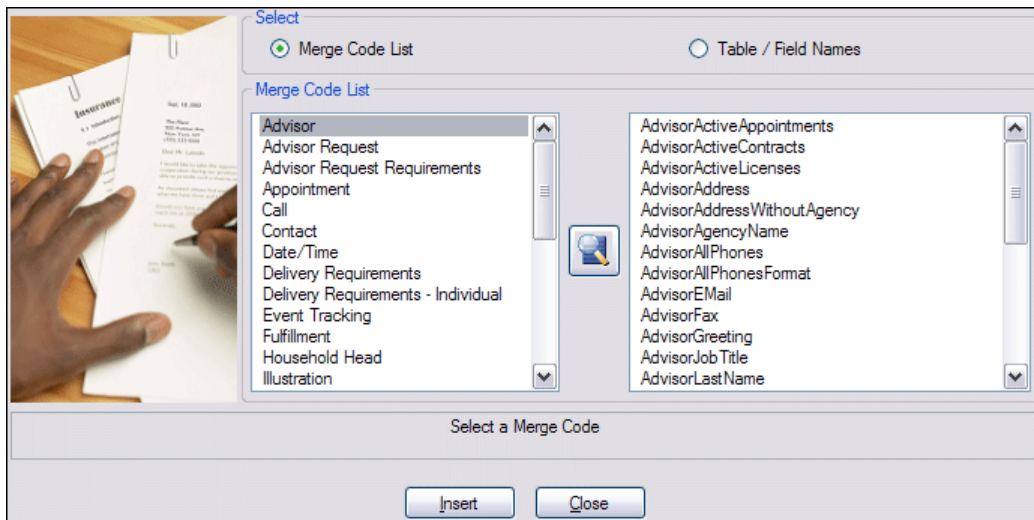
The function of each button is described in the following table.

Word 2003	Word 2007	Function
Insert Letter Template	Insert (in the Letter Template group)	To write a letter based on an existing form letter template, click this button to find the form letter and insert its text into the current letter.
Modify Letter Template	Modify	Search for and open existing form letters. This function is used mainly to update and save changes to form letters.
Insert Header/Footer	Insert Header/Footer	If a page header or footer has been specified in User Preferences - Correspondence Options , click this button to import a header or footer into the letter.
Insert Merge Codes	Insert (in the Merge Codes group)	After inserting merge codes, the user can expand them to insert the selected data from the selected contact.
Expand Merge Codes	Expand	After inserting merge codes, the user can expand them to insert the selected data from the selected contact. If no contact has been selected, the system prompts the user to select a contact before expanding the merge codes.
Save	Save Save As Save & Close	(In Word 2003, click the Save button to open a menu containing all three options.) If a contact has been selected, these options save the letter to the contact's SmartOffice record. If a contact has not been selected, these options save the letter as a new form letter template.
N/A	Print	Click this button to print the letter.
N/A	E-mail	Click this button to send the letter by e-mail.

Word 2003	Word 2007	Function
Log	View Log/Log (Advanced) E-mail Log Delete Local Template Cache	<p>(In Word 2003, click the Log button to open a menu containing all three options.)</p> <p>The View Log button displays technical information that is useful for troubleshooting when the user contacts Ebix CRM Technical Support. The E-mail Log button can be used to send this log information to Technical Support if the support representative requests it.</p> <p>The Delete Local Template Cache button can also be useful for troubleshooting when the user contacts Technical Support, particularly for issues with form letter templates. The button deletes locally cached copies of letter templates and forces SmartLink for Word to redownload them. Ebix CRM recommends that users click this button only when advised by Technical Support.</p>

Composing a Letter in Word

1. Start a letter using one of the methods described in [Correspondence](#).
2. Compose or edit the text of the letter in Word.
3. To insert information from SmartOffice into the letter using merge codes or fields, click the **Insert Merge Codes** button (Word 2003) or the **Insert** button in the Merge Code group (Word 2007) in the SmartOffice toolbar or tab. This opens the Merge Code Browser dialog box.



- **Merge codes:** 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 a contact's name, select the Contact category from the list on the left. The list on the right 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
- **Individual fields:** 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 then select the most appropriate choice.

After inserting merge codes or fields, click the **Close** button.

4. Once the letter is finished, click the **Save** button on the SmartOffice toolbar or tab in Word.
5. In the Save Letter dialog box, enter details about the letter and then click the **Save** button.

The screenshot shows the 'Save Letter' dialog box with the following details:

- Template Name:** [Empty text box]
- Default E-Mail Subject:** [Empty text box]
- Keyword:** [Empty dropdown menu]
- Contact:** Ackerman, Joseph M.
- Private options:**
 - Private (only viewable by me)
 - Only Modification by Me
 - Mark this document final (read-only)
 - Accommodate Special Layout and Formatting
- Marketing/Service:**
 - Marketing
 - Servicing
- Save options:**
 - Save to Contact Letter Log
 - Save as Letter Template
- Run Time User Input Prompt:** 10 empty text input fields labeled User Input 1 through User Input 10.
- Additional Info:**
 - Purpose:** [Empty dropdown menu]
 - Document List Category:** [Empty dropdown menu]
 - Expires On:** [Empty dropdown menu]
 - Created On:** [Empty text box]
 - Created By:** [Empty text box]
 - Modified On:** [Empty text box]
 - Modified By:** [Empty text box]
- Buttons:** Save, Cancel

The options in this dialog box are as follows:

- **Template Name:** A unique name for the letter.
- **Default E-mail Subject:** The text that displays in the subject line if the letter is sent by e-mail.
- **Keyword:** Keywords enable the user to further classify the letter (e.g., Address change, Estate planning, etc.).
- **Contact:** This is the name of the contact associated with this letter.
- **Private (only viewable by me):** Select this option to prevent other users in the office from reading the letter.
- **Only Modification by Me:** Select this option to ensure that other users cannot edit the letter.
- **Marketing/Servicing:** Select the option that best describes the intent of the letter.
- **Save to Contact Letter Log:** If this option is selected, the letter is treated as a one-time only letter and is saved only to the letter log of the contact identified in the Contact field.
- **Save as Letter Template:** If this option is selected, the letter is saved as a form letter template in SmartOffice and can be accessed in Template Administration.
- **Purpose:** This option is used primarily for automating Pending Case Management workflows and can be skipped for most letters.
- **Document List Category:** Categories are used to group letters in the Letter/Documents content link of a contact (e.g., Sales, Service, Recruiting).

SmartMail E-mail Posting


SmartMail E-mail Posting enables SmartOffice users to post copies of e-mail messages to a contact's SmartPad using Microsoft Outlook.

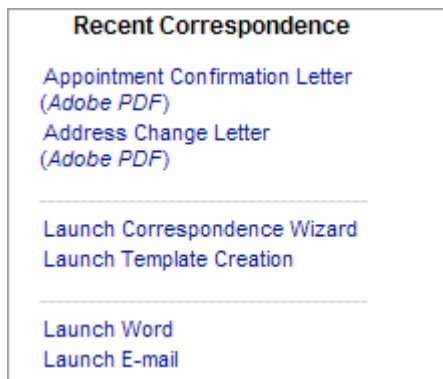
SmartMail E-mail Posting is installed as part of the [SmartOffice Utilities](#).

A user must have the appropriate user rights enabled to use these integrations. A user with office administrator rights can enable those user rights.

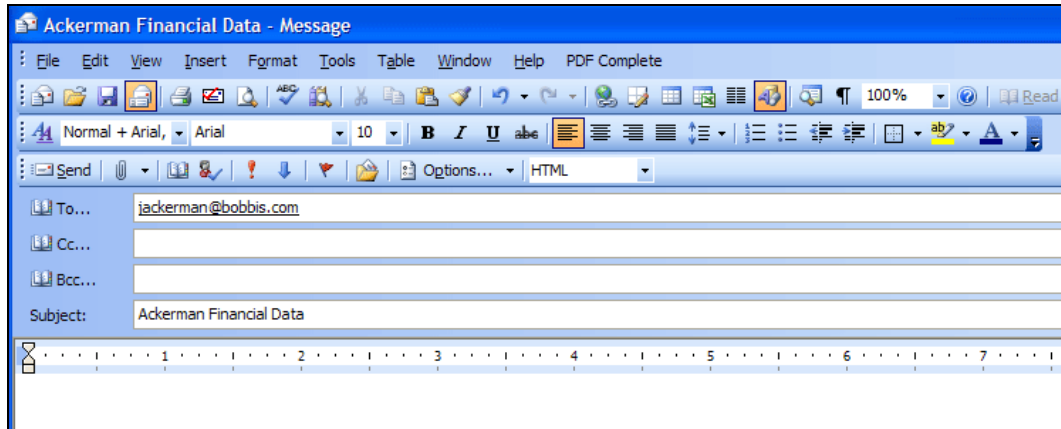
Posting E-mail Messages from SmartOffice

With SmartMail for Outlook, which is included with [SmartOffice Utilities](#), users can post e-mail messages from within SmartOffice using Outlook. This method can be used to conveniently post messages to a contact's SmartPad, eliminating the need to cut and paste e-mail text.

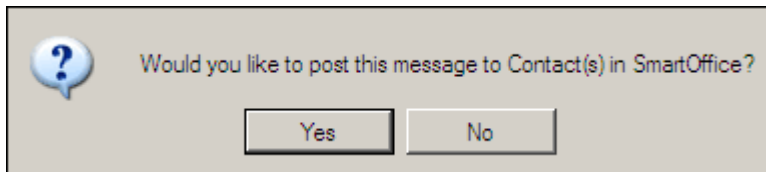
1. In SmartOffice, open a contact and make sure the Personal [content link](#) is select.
2. Do one of the following:
 - o Click an e-mail address in the E-mail/Web Addresses section.
 - o Position the mouse pointer over the Correspondence button  and then select **Launch E-mail** from the expanded list of options.



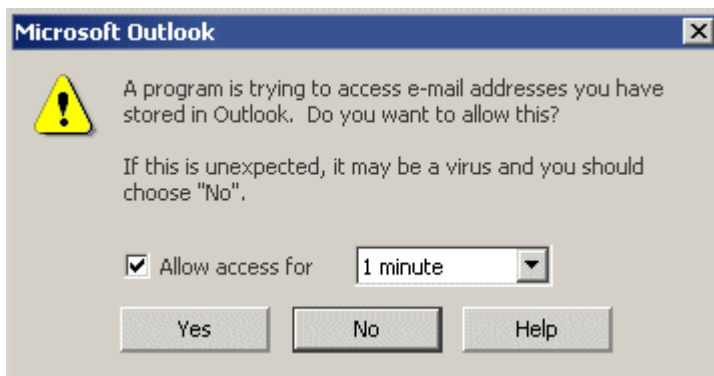
3. The Outlook e-mail composition window opens, automatically addressed to the contact.



4. Compose the message.
5. Send the message to the contact by clicking the **Send** button.
6. If a confirmation message displays, click the **Yes** button. (The confirmation message can be enabled or disabled in SmartMail for Outlook Options.)



7. If an alert warns that a program is trying to access e-mail addresses stored in Outlook, select the **Allow access for** option and select a time period from the drop-down list.



8. If the Posting dialog box opens, 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. Then click the **Post** button.

The message is sent to the selected contacts through Outlook and is posted to the selected contacts' SmartPads.

Posting E-mail Messages from Outlook

With SmartMail for Outlook, which is included with [SmartOffice Utilities](#), users can post both existing and new e-mail messages from Outlook.

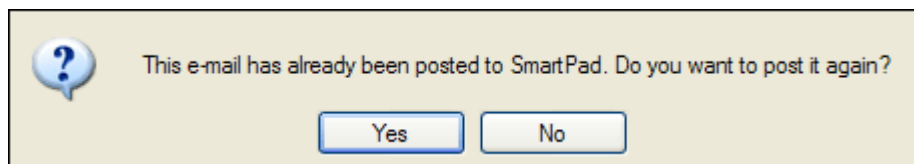
Existing Messages

Existing e-mail messages are those that the user has already sent or received. The user can post these messages to SmartOffice from any Outlook folder.

1. Make sure that only one SmartOffice browser window is open.
2. [Sign in to SmartOffice](#).

Note: The user must be signed in to SmartOffice to post e-mail messages to SmartOffice contacts.

3. In Outlook, open the mail folder (e.g., Sent Items) containing the message to be posted.
4. Select the message and then click the **Post E-mail to SmartOffice** button in the SmartMail for Outlook toolbar.
5. If the message was posted previously, the following confirmation message displays.



6. Click the **Yes** button to continue posting or click the **No** button to stop the process.
7. To see the list of contacts to which the e-mail message has already been posted, click the **Posted List** button.
8. In the Posting dialog box, tag the contacts whose SmartPads should be updated with the contents of the e-mail message. To add contacts not listed, click the **Search for Contacts** button.

Note: The contact names displayed in this list are determined by selections made in SmartMail for Outlook Options.

9. Click the **Post** button.

In addition to posting only one e-mail message at a time, the user can select multiple e-mail messages to post. The following behavior occurs when posting multiple messages:

- The maximum number of e-mail messages able to be selected at one time is designated by the SmartOffice system administrator.
- The subject of the posting is not modifiable.
- No follow-up activities can be created.
- If the messages were posted previously, a dialog box opens prompting selection of one or more messages to be posted again.

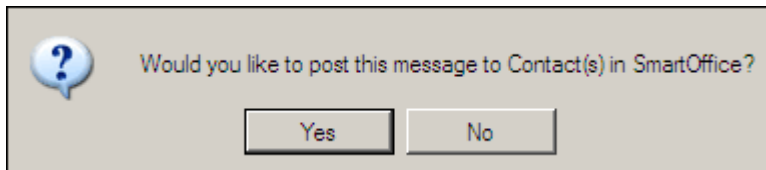
Users do not need to wait for one e-mail posting workflow to finish before accessing Outlook or beginning another workflow.

New Messages

1. Make sure that only one SmartOffice browser window is open.
2. [Sign in to SmartOffice](#).

Note: The user must be signed in to SmartOffice to post e-mail messages to SmartOffice contacts.

3. In Outlook, open a new e-mail message window and compose a message.
4. Click the **Send** button. If a confirmation message displays, click the **Yes** button.



Note: Depending on the user's current posting options, the confirmation message may not display.

5. In the Posting dialog box, select the appropriate contacts and then click the **Post** button.

Note: Depending on the user's current posting options, the Posting dialog box may not open.

Intra-Office E-mail

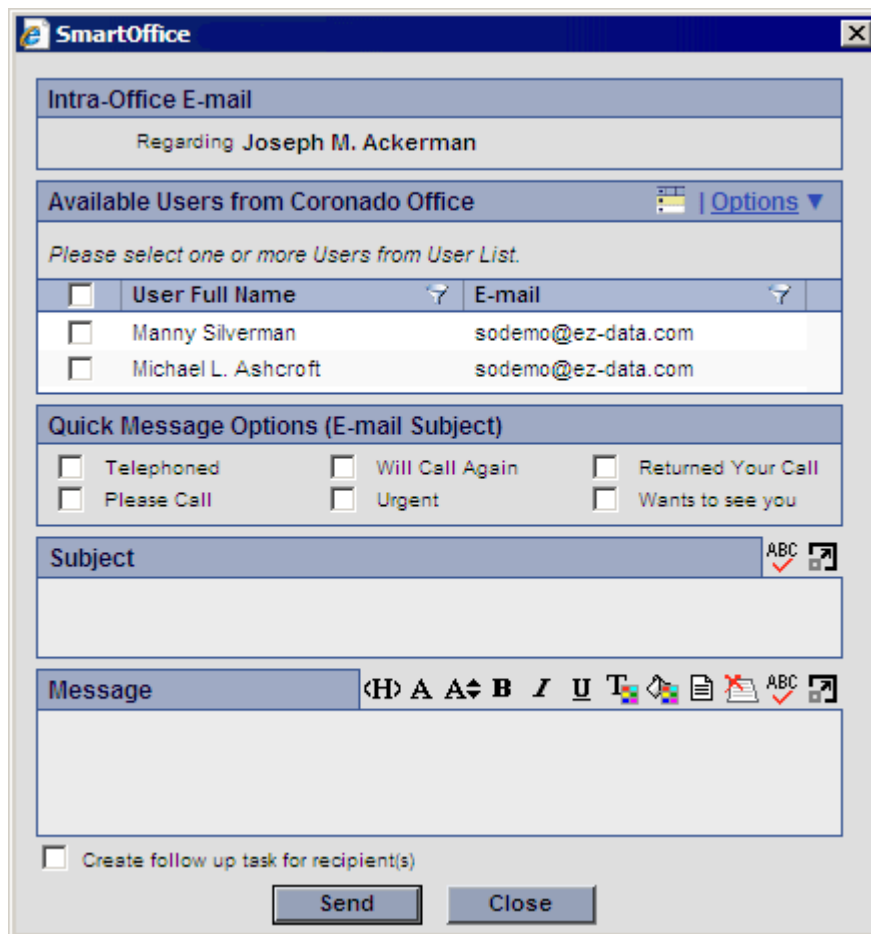
With the Intra-Office E-mail feature, a user can send a message to other users in the office regarding a contact that the user is viewing.

The message is sent to the e-mail address listed on the [User Preferences - Basic Info](#) content link of each selected recipient. In addition, the message is posted to the contact's SmartPad.

1. After selecting a contact, policy or other record (or while viewing that record), click the **Intra-Office E-mail** button.



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



<input type="checkbox"/>	User Full Name	E-mail
<input type="checkbox"/>	Manny Silverman	sodemo@ez-data.com
<input type="checkbox"/>	Michael L. Ashcroft	sodemo@ez-data.com

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.

User Preferences

User preferences include a user's basic information, calendar options, activity options, policies/investments information, letter printing/e-mail options and other settings.

The SmartOffice administrator specifies default user preferences for all new users. To review or make changes to these preferences, use one of these methods:

- Click the **Settings** hyperlink in the Global Hyperlinks (see [General Navigation](#)).
- From the side menu, select **User Preferences** from the expanded **Setup** menu.
- From User Accounts, click the **User Preferences** [content link](#).

User Preferences - Basic Info

Accessible from [User Preferences](#), the Basic Info content link contains the user's name and contact information, a password reminder question (to be displayed if the user forgets his/her password) and miscellaneous options.

User Preferences - Daniel Odell

User

[Basic Info](#) | [Calendar Options](#) | [Activity Options](#) | [Policies/Investments](#) | [Correspondence Options \(L\)](#) | [Time Zone](#) | [SI Authentication](#) | >>

General Information

User Name: **Daniel**
Full Name: **Daniel Odell**
Contact Record for this User: **Daniel Odell**
E-mail Address: **sodemo@ez-data.com**
Default User Group: **All Users in Office**
(This will be the default user group selected for Custom Fields)

Password Reminder

Enter a password reminder question.
Questions:
Replace the asterisks with your password answer.
Please do not use asterisks in your answer.
Answer:

Cross Office Record Sharing

Not a Specialist
This setting cannot be changed if Office Security is not enabled for the office, if you are actively working with shared records, or if you are designated as a Super User.

Default Settings

Default Area Code: **626**
Default Country Code: **1**
Date Format: **MM/dd/yyyy**
Business SmartPad View Settings: **1. Business Only**
Print all PDFs in Black & White: **No**
Default location at Login: **Dashboards**

Do not prompt to send referral thank you letter.
 Show Field Help Text
 Do not show button-images on SmartPDA
 Do not link Opportunity to Calendar Activity
 Do not show user list while accepting a lead
 Display timed activities before untimed activities on SmartPDA

Alert/Notification Settings Outside of SmartOffice

Receive Alert Center Notifications Outside of SmartOffice
Select a format in which to receive alerts outside of SmartOffice:
 E-mail
E-mail Address:
 SMS Text Message
Provider: **T-Mobile** Mobile Number:

My Favorite User List

User Full Name
 Michael L. Ashcroft
 Norma Peterson
 Phillip Anderson

General Information Section

The User Name field cannot be edited here; it can be edited only from User Accounts by a user with administrative rights.

Password Reminder Section

SmartOffice has a password reminder feature to assist users who forget their passwords.

- **Question:** Enter a security question that SmartOffice should ask when the user clicks the **Forgot Password** hyperlink on the [SmartOffice sign-in page](#). Make sure the question is one whose answer is easy to remember but not easy for others to guess.
- **Answer:** Enter the answer to the password security question in this field. Do not use asterisks (*) in the answer.

When the user enters the correct answer in response to the security question, SmartOffice generates a new password and sends it to the e-mail address specified in the E-mail Address field.

Cross Office Record Sharing Section

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.

The Not a Specialist setting cannot be changed if office security is not enabled for the office, if the user is actively working with shared records or if the user is designated as a Super User.

User Preferences Default Settings Section

- **Default Area Code:** The area code that will display by default when the user adds a telephone number to a record.
- **Default Country Code:** The country code that will display by default when the user adds a telephone number to a record. 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:** The date format used while the user is signed in. If this field is blank, the date format set for the entire office is used.
- **Business SmartPad View Settings:** The view option for displaying the SmartPad of businesses. The options are:
 - Business Only
 - Key Relations Only (e.g., partners in the business, attorneys, CPAs or other people who are associated with this business)
 - Business & Primary Contact
 - Business and All Key Relations.
- **Print all PDFs in Black & White:** Select the **Yes** option to print PDF files in black and white instead of color.

- **Default Location at Login:** Select the page that displays immediately after a successful sign-in.
- **Do not prompt to send referral thank you letter:** When the Referred By field is completed while creating a contact, SmartOffice prompts the user to send a thank you letter to the referring contact (provided that the referring contact exists in SmartOffice). Select this option to suppress these prompts.
- **Show field help text:** Select this option to display help text when the cursor is placed in certain fields.
- **Do not show button images on SmartPDA:** Select this option to display text instead of button images on SmartPDA. This option improves load times in SmartPDA.
- **Do not link opportunity to calendar activity:** Select this option to specify that only activities created from opportunity Calendar Activity-type actions should be automatically linked to an opportunity. This option prevents normally created activities from being automatically linked to an open opportunity. Refer to the [SmartOpportunities User Guide](#) for more information.
- **Do not show user list while accepting a lead:** Select this option to accept leads without being prompted to assign users to the newly created contacts. Refer to the [SmartLeads User Guide](#) for more information.
- **Display timed activities before untimed activities on SmartPDA:** Select this option to display timed activities first in SmartPDA.

Alert/Notification Settings Outside of SmartOffice Section

Select the **Receive Alert Center Notifications Outside of SmartOffice** option and then select the appropriate **E-mail** or **SMS Text Message** option to have SmartOffice alerts/notifications sent outside of SmartOffice.

To select the types of alerts to receive, go to [User Preferences - Alert Center](#).

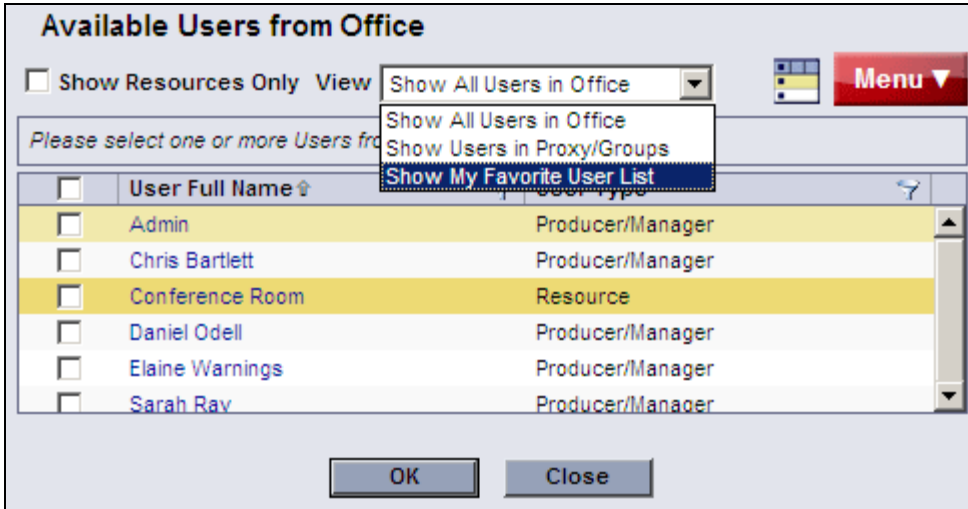
Note: To receive activity-related alerts, the user must also enable activity alerts in [User Preferences - Activity Options](#).

My Favorite User List Section

Users who frequently assign, view data for or otherwise interact with specific users in the office can now create a list of favorite users. The list makes selecting users faster than browsing through all users in the office.

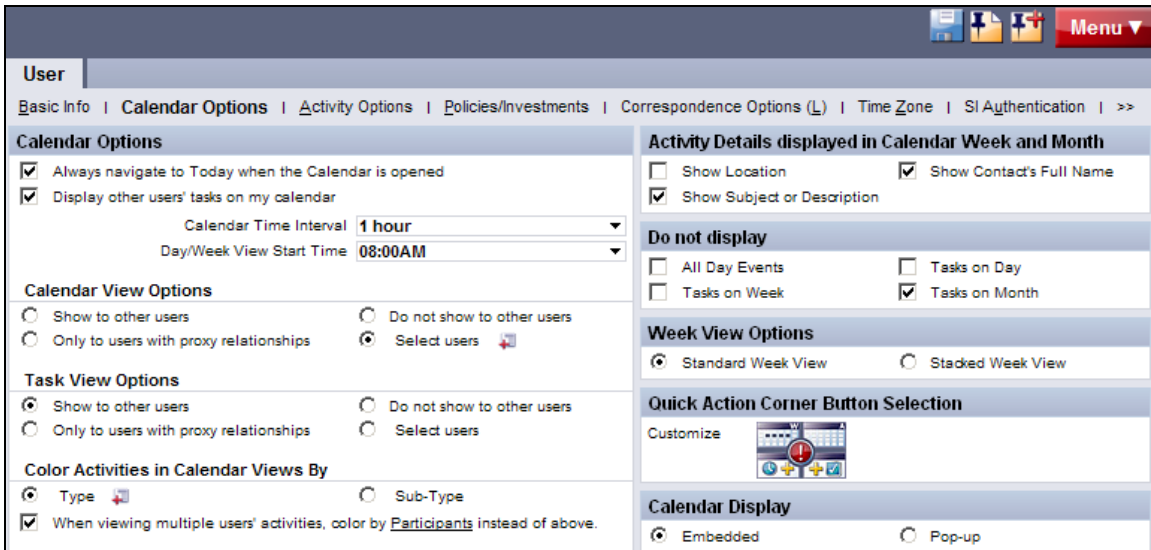
Click the New **'Favorite User'** record button to add users to the list.

After creating a favorites list, the user can select the **Show My Favorite Users List** option from the **View** drop-down list anytime the Available Users dialog box opens.



User Preferences - Calendar Options

Accessible from [User Preferences](#), this content link controls the default calendar display options for the current user.



Calendar Options

- **Always navigate to Today when the Calendar is opened:** Forces the calendar to open on the current day as specified by the user's local date/time settings. If this option is cleared, the calendar opens to the last day viewed.
- **Display other Users' Tasks on my Calendar:** Enables users to specify whether or not to display other users' tasks while viewing their calendars.
- **Calendar Time Interval:** Enables the user to specify the time interval on the Calendar Day (either 30 minutes or 1 hour).
- **Day/Week View Start Time:** The Calendar Day starts at the time of the first timed activity. If no timed activity exists for that particular day, the day starts at the time specified here.
- **Calendar View Options/Task View Options:** Enables the user to specify whether calendar activities and tasks should be visible to other users. The four options are:
 - **Show to other users:** This option enables other users to view the current user's calendar activities/tasks.
 - **Do not show to other users:** This option prevents other users from viewing the current user's calendar activities/tasks.
 - **Only to users with proxy relationships:** This option shares the current user's calendar activities/tasks only with those users who have proxy relationships with the current user.
 - **Select users:** This option enables the **Add Users Who Can View My Calendar** and **Add Users Who Can View My Tasks** buttons. Click these buttons to select specific users who can view the current user's calendar activities/tasks.
- **Color Activities in Calendar Views By:** Enables the user to specify whether activities should be color-coded by type, sub-type or or—when multiple users' calendars are viewed at once—by participant.

Activity Details Displayed in Calendar Week and Month

Specify whether or not SmartCalendar should display the location, subject/description and/or contact's full name on activities displayed in the Calendar Week and Calendar Month views.

Do Not Display

Specify whether all-day events and/or tasks should be hidden on the various calendar views.

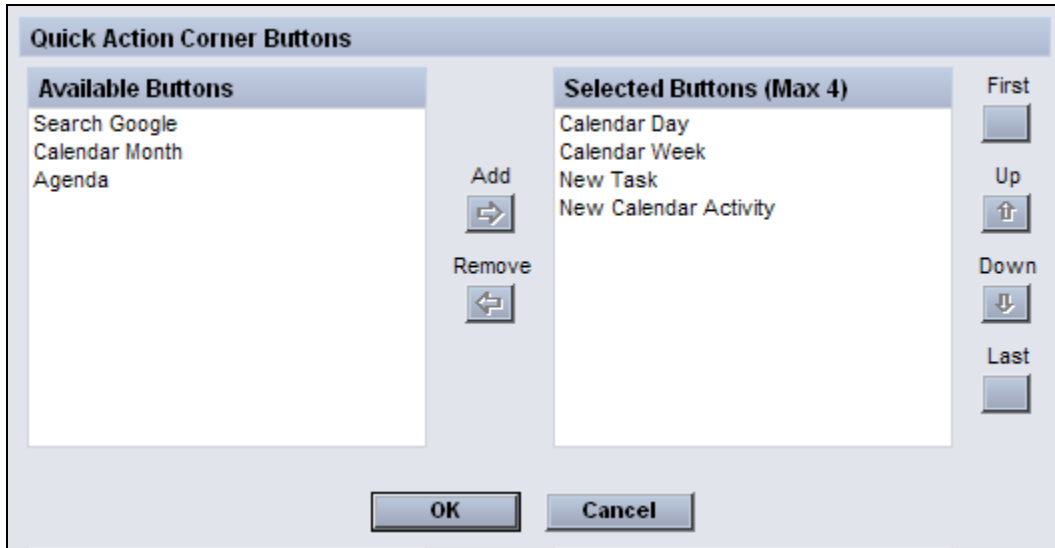
Week View Options

Select the default version of the Calendar Week: standard or stacked. For more information, refer to the [SmartCalendar User Guide](#).

Quick Action Corner Button Selection

Click the icon in this section to select and arrange the buttons that display in the [Quick Action Corner](#).

In the dialog box that opens, click the **Add** and **Remove** buttons to select up to four buttons. Click the **First**, **Up**, **Down** and **Last** buttons to specify the order of the selected buttons.



Calendar Display Section

Select whether the calendar displays within SmartOffice or in a separate browser window.

User Preferences - Activity Options

Accessible from [User Preferences](#), this content link controls the default activity options for the current user.

The screenshot shows the 'User Preferences' window with the 'Activity Options' tab selected. The interface includes a navigation bar at the top with 'User' and 'Menu' buttons. Below the navigation bar, there are several sections for configuring activity options:

- Default Activity/Task Creation Options:** Includes checkboxes for 'Prompt if an Activity Participant has a schedule conflict' (checked), 'Receive activity alert notifications' (checked), 'Disable Audio Activity Reminder' (unchecked), and 'Enable Activity Response section in Activity Detail' (unchecked). It also features dropdown menus for 'Reminder before Call' (30 Minutes), 'Reminder before Appointment' (15 Minutes), 'Start Time for New Appointments' (08:00AM), 'Calendar Activity - Type' (Appointment), 'Task - Type' (Meeting), and 'Activity Duration' (2 Hours).
- Activity Add Mode:** Includes radio buttons for 'Simple Add' and 'Comprehensive Add' (selected).
- Default Activity Participants:** Includes radio buttons for 'Current User', 'Primary Advisor', 'Primary Advisor and Current User', and 'Select Users' (selected).
- Default Task Participants:** Includes radio buttons for 'Current User', 'Primary Advisor', 'Primary Advisor and Current User', and 'Select Users' (selected).
- Task AutoMove / Unfinished Activities:** Includes a dropdown for 'AutoMove will move Tasks not marked done to the current day. How far in the past should SmartOffice look?' (22 Days) and a note: 'Note: The days drop-down list also determines what displays in Unfinished Activities.' It also has a 'Task types to be moved forward' field.
- Activity Outcome / Dialer Options:** Includes checkboxes for 'Disable default Activity Tracking for new activities' (unchecked), 'Assume all calls are outgoing' (checked), 'Do not navigate to the Contact Detail Page on Phone Dial' (unchecked), 'Do not show the Phone List while using the Dial button.' (unchecked), and 'Do not show Make/Receive call dialog box while using the dial button.' (unchecked).
- Activity Outcome Workflow:** Includes radio buttons for 'Standard' (selected) and 'Comprehensive'.
- Activity Confirmation Letter Settings:** Includes radio buttons for 'Print Letter', 'E-mail Letter', 'Ask at Runtime' (selected), and 'Disable'.

Note: Many of these options apply only when Office Security is enabled. For more information, refer to the [SmartSecurity User Guide](#).

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.
- **Receive Activity Alert Notifications:** Select this option to display alerts for activities in the Alert Center.

Note: To enable activity alerts, the user must also select the appropriate alerts in [User Preferences - Alert Center](#). Optionally, the user can receive alerts by SMS text or e-mail by selecting the appropriate options in [User Preferences - Basic Info](#).

- **Disable Audio Activity Reminder:** Select this option to disable audible activity reminders. For more information about reminders, refer to the [SmartCalendar User Guide](#).

- **Enable Activity Response Section in Activity Detail:** Select this option to be able to respond to activities directly from the Activity dialog box.
- **Reminder before Call:** Turns on the reminder message to display for timed Call-type activities.

Note: The option can be set up to eight hours before the Call activity within the same day. The user must be signed in to SmartOffice to receive reminders.

- **Reminder Before Appointment:** Turns on the reminder message to display for timed Appointment-type activities.

Note: The option can be set up to eight hours before the Appointment activity within the same day. The user must be signed in to SmartOffice to receive reminders.

- **Start Time for New Appointments:** Choose a default time for all newly created appointments. Even when this setting is specified, however, the user can edit the start time of any new activity.
- **Calendar Activity – Type:** Enables the user to define the default activity type when creating calendar activities.
- **Task – Type:** Enables the user to define the default activity type when creating tasks.
- **Activity Duration:** Enables the user to specify the default duration of all newly created calendar activities. When the user creates an activity, this setting is used to automatically fill in the end time of the activity based on the start time.
- **Activity Add Mode:** Specifies whether the user wants the Activity dialog box to display in Simple Add or Comprehensive Add mode by default when creating activities. For more information about these modes, refer to the [SmartCalendar User Guide](#).
- **Default Activity Participants:** Specifies which users are automatically added to newly created calendar activities as participants.
- **Default Task Participants:** Specifies which users in the office are automatically added as participants to new tasks. The selections are current user, primary advisor, both the current user and primary advisor, and a list of selected users. If the Selected Users option is selected, the Default Participants button displays. Click the button to select users.

Task AutoMove/Unfinished Activities

AutoMove moves tasks that are not marked as Done from previous days to the current day.

Only activities with a status of Active are moved.

- **How far in the past should SmartOffice look?** Select the number of days in the past for which SmartOffice should look for uncompleted tasks. Tasks that are older than the specified number of days are no longer moved to the current day. The available values in the drop-down list are 1-30 days, 60 days, 90 days and 180 days. 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:** Click this button to specify the task activity types that should be moved forward using AutoMove. A dialog opens, enabling the user to select one or more of the following activity types: Call, Appointment, Project, Meeting, Personal and To Do. Any custom activity types the user has created are also available for selection. For more information about activity types, refer to the [SmartCalendar User Guide](#).

Activity Outcome/Dialer Options

- **Disable default Activity Tracking for new activities:** By default, SmartOffice enables the Tracked option in the Activity dialog box for all newly created activities (except for Personal-type activities). When tracked activities are marked as finished, the user is prompted to record the outcome of the activity (e.g., contact not made, call rescheduled, sale made). Select this option to disable default tracking of activities.
- **Assume all calls are outgoing:** This option is related to SmartOffice's auto-dialer, which can automatically dial a contact's phone number (or 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 is not 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), clear this option.
- **Do not show Phone List while using the Dial button:** Disables the display of the Phone List while using the Dial button. Select this option if the auto-dialer is not being used but there is still a need to time and track calls.
- **Do not show the Make/Receive Call dialog box while using the Dial button:** Disables the display of the Make/Receive Call dialog box while using the Dial button.
- **Activity Outcome Appointment/Call Workflow:** Enables the user to choose whether the activity outcome for tracked activities is standard (simplified) or comprehensive (detailed). This option 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.

Activity Confirmation Letter Settings

Specify whether activity confirmation letters sent to contacts should be printed or sent by e-mail. Select **Ask at Runtime** to be prompted to select the format every time a letter is sent. Select **Disable** to send no activity confirmation letters.

User Preferences - Policies/Investments

Accessible from [User Preferences](#), this content link controls the types of policies and investments that are visible to the user.

The screenshot shows the 'User Preferences' window with the 'Policies/Investments' tab selected. The window has a navigation bar at the top with options like 'Basic Info', 'Calendar Options', 'Activity Options', 'Policies/Investments', 'Correspondence Options (L)', 'Time Zone', and 'SI Authentication'. Below the navigation bar, there are three main sections, each with a 'Tag All' checkbox:

- Policy Types:** Life, DI, Annuity, LTC, Medical, Homeowner, Auto, Umbrella, Other.
- Group Policy Types:** Group Medical, Group Dental, Group Vision, Group LTC, LTD, STD, Retirement, Group Life, A D & D, Travel, Section 125, Group Other.
- Investment Types:** Mutual Funds, Stocks, Bonds, Cash and Equivalents, Fixed Annuities, Variable Annuities, Unit Investment Trusts, Direct Participation Programs, Miscellaneous, Bank Account, Personal Property, Notes Receivable, Real Estate.

Note: This content link displays only if the user has the Policy Tracking, Group Benefits (Group Policy) or Investment Tracking license.

Select the appropriate types to display in policy, group policy and/or investment lists in SmartOffice and then click the **Save** button.

User Preferences - Correspondence Options

Accessible from [User Preferences](#), this content link contains the user's default letter-printing and e-mail options for SmartOffice. Automated SmartOffice workflows use these settings; however, the user can change these options while sending individual letters and e-mail messages.

Note: If the SmartOffice administrator specifies office-level Correspondence Options, the user may not be able to edit some options on this content link.

The screenshot shows the 'User Preferences - Daniel Odell' interface. The 'User' tab is selected, and the 'Correspondence Options (L)' link is active. The interface is divided into several sections:

- Recipient Address Type:** Radio buttons for Preferred Address (selected), Residence Address, and Business Address.
- Default Templates:** Text input fields for Envelope, Header, Footer, and MS Word Default.
- Letters/Documents Options:** Radio buttons for Display Letter Log and Document List together (unselected) and Display Letter Log and Document List separately (selected).
- Print Output Settings:** Radio buttons for Print on Local Printer (unselected) and Send to Printer Queue (selected).
- Word Processor Selection:** Radio buttons for Microsoft Word (selected) and SmartOffice Letter Editor (unselected).
- E-mail Attachment Options:** Radio buttons for PDF (selected) and RTF (unselected).
- Correspondence Options:** A grid of checkboxes for Print One Letter per Household, Apply Contact's Mail Privacy, Preview before printing, Post to Letter Log/SmartPad, Create Follow-up Activity, Send Form Letter as e-mail body, and Use Default E-mail Signature from Outlook/Lotus Notes.

Recipient Address Type Section

Specify whether letters should be sent to a recipient's preferred, residence or business address by default. The selection is used to insert the appropriate address merge codes in letters, labels and envelopes. Preferred, residence and business addresses are specified on a contact's Personal content link.

Letters/Documents Options Section

- **Display Letter Log and Document List together:** Select this option to display letters created from within SmartOffice and documents uploaded or linked from outside SmartOffice together in a single list on the contact Letters/Documents content link.
- **Display Letter Log and Document List separately:** Select this option to display letters created from within SmartOffice and documents uploaded or linked from outside SmartOffice in separate Letter Log and Document List sections on the contact Letter/Documents content link.

Print Output Settings Section

- **Print on Local Printer:** Select this option if users are responsible for printing their own documents. Documents are sent to the local printer.
- **Send to Printer Queue:** Select this option if administrative staff is responsible for printing documents for most of the users in SmartOffice. Print jobs are 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 Section

- **Print one letter per household:** Ensures that only one letter is sent to a household if more than one member of the household is selected when the user sends mass correspondence. Correspondence is 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:** With this setting enabled, SmartOffice checks the Communication Privacy settings on the contact's Add'l Personal content link. If those settings specify that no postal mail or e-mail should be sent, the contact will not receive the letter.
- **Preview before printing:** Automatically expands merge codes and opens a print preview before sending a document to the local printer or SmartOffice printer queue.
- **Use default e-mail signature from Outlook/Lotus Notes:** Users who post e-mail messages to SmartOffice directly from Microsoft Outlook or Lotus Notes can have their default Outlook/Lotus Notes e-mail signature added to outgoing e-mail messages.
- **Post to Letter Log/SmartPad:** Saves all letters and envelopes generated and printed from SmartOffice to the 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 instead of sending the letter as an e-mail attachment.

Default Document Settings Section

- **Envelope, Header, Footer, MS Word Default:** Enables the user to choose a specific envelope, header, footer and Word template to use when selecting the Launch Word option from the Correspondence button menu (see [Correspondence](#)). These options help to ensure a consistent appearance for all correspondence. This option may not apply to pre-printed stationery.
- **Print header on first page only:** The header will be printed on the first page of the document only.
- **Print footer on first page only:** The footer will be printed on the first page of the document only.

Word Processor Selection Section

Select either Microsoft Word or the SmartOffice Letter Editor as the default word processor to use when composing and previewing letters.

E-mail Attachment Options Section

When sending a form letter as an e-mail attachment, the user can send the file as a PDF or RTF file. Select the default format for attachments.

User Preferences - Time Zone

Accessible from [User Preferences](#), this content link lists all available time zones. Select the appropriate time zone and then click the **Save** button.

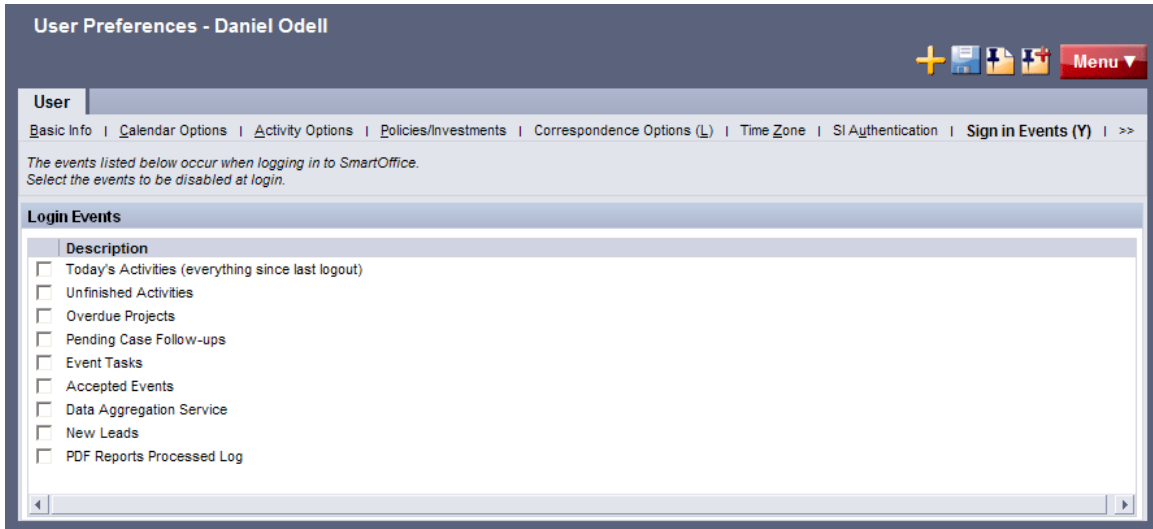
If there is a discrepancy between the selected zone and the computer's local time, a warning displays on this content link.

The screenshot shows the 'User Preferences - Daniel Odell' interface. The 'User' tab is active, and the 'Time Zone' section is selected in the navigation bar. A list of time zones is displayed, with '[GMT - 7:0] Pacific Time (US & Canada)' selected. To the right, a message states: 'Your local date and time should be 08/04/2010 12:23PM. According to your time zone setup, your local time should be 07:00 hours behind the Greenwich Mean Time (GMT).' Below this, a message indicates: 'The time zone setting is correct for your computer's local time.'

User Preferences - Sign-In Events

This content link (accessed from [User Preferences](#)) controls notifications that display immediately after the user signs in to SmartOffice.

To disable one or more of these events, tag them and then click the **Save** button.



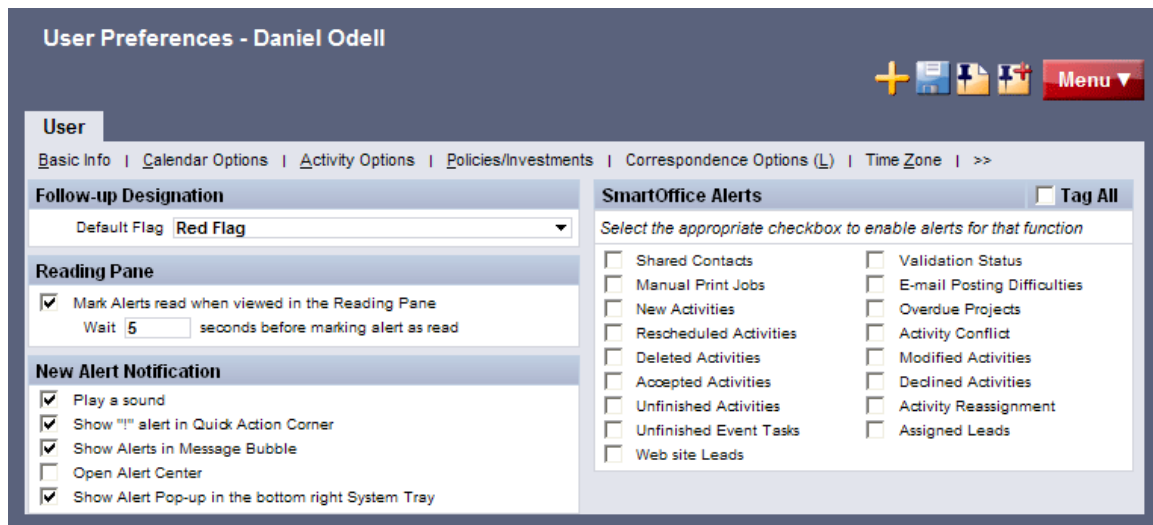
The screenshot displays the 'User Preferences - Daniel Odell' interface. At the top, there is a navigation bar with a '+' icon, social media icons, and a 'Menu' dropdown. Below this is a tabbed interface with the 'User' tab selected. The 'Sign in Events (Y)' section is active, showing a list of events that occur when logging in to SmartOffice. The events are listed under the heading 'Login Events' and include:

- Today's Activities (everything since last logout)
- Unfinished Activities
- Overdue Projects
- Pending Case Follow-ups
- Event Tasks
- Accepted Events
- Data Aggregation Service
- New Leads
- PDF Reports Processed Log

Each event has a checkbox next to it, which is currently unchecked. The interface also includes a scroll bar at the bottom of the list.

User Preferences - Alert Center

Accessible from [User Preferences](#), these settings control the behavior of the Alert Center.



Follow-Up Designation Section

- **Default Flag:** Select the appropriate default color to use when an alert is marked for follow-up from the corresponding drop-down list.

Reading Pane Section

- **Mark Alerts read when viewed in the Reading Pane:** Select this option to differentiate between read and unread messages (unread messages display in bold).
- **Wait __ seconds before marking alert as read:** Specify the number of seconds between the time the alert is selected and the time the alert is marked as having been read.

New Alert Notification Section

- **Play a sound:** Select this option to be notified using an audio alert when an alert arrives.
- **Show "!" alert in Quick Action Corner:** In the [Quick Action Corner](#), this option enables a flashing exclamation mark ("!") when unread alerts are available.
- **Show Alerts in Message Bubble:** Select this option to display notifications of unread alerts in a message bubble extending from the [Quick Action Corner](#).
- **Open Alert Center:** Select this option to have the Alert Center open automatically in a separate window when the user signs in.
- **Show Alert Pop-up in the bottom right System Tray:** Select this option to display all alerts one-by-one as pop-up messages extending from the Windows system tray (i.e., the area near the clock).

SmartOffice Alerts Section

The Alert Center will display alerts for the actions selected in this section. For example, if the **New Activities** option is selected, the user will receive an alert if he/she is added as a participant in a newly created activity.

Note: To receive activity-related alerts, the user must also enable activity alerts in [User Preferences - Activity Options](#).

SmartOffice Training

Overview

Successful businesspeople 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 Ebix CRM 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 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 before this phase, all users can be up and running quickly.

Training Delivery Methods

Ebix CRM'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

Ebix CRM 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.

Ebix CRM 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. [Sign in to 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.

Free Live Training Classes

Ebix CRM's live training classes are designed to help customers get the most out of SmartOffice's core features. Topics covered include the calendar, contacts, reports and administration, just to name a few. These free classes are offered on multiple dates to accommodate your busy schedule. [View the class schedule and register](#).

Live Web-Based Sessions

Live Web-based training is a cost-effective, personalized training solution that combines the benefits of interacting with an Ebix CRM 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 Ebix CRM's facilities.

On-Site Training

An Ebix CRM 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.

Ebix CRM 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 Ebix CRM's headquarters in Pasadena, California. 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 Ebix CRM 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.

Contact Information

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

Technical Support Information

Ebix CRM'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, Ebix CRM's help desk staff is happy to help.

Each office (one or multiple locations) with 50 or fewer users may specify up to two technical support coordinators to interface with Ebix CRM's technical 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 Ebix CRM's technical support staff.

Note: If you have a question regarding SmartOffice functionality, Ebix CRM recommends that you first look at the 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, training movies, user guides and more. Another valuable resource is the [Ebix CRM User Forum](#), where users share thoughts, ideas and questions with other SmartOffice users.

Before contacting the support team, please have the following information ready:

- The name of the registered user.
- A comprehensive description of the issue, including the module being used, how the issue occurred, whether the issue is consistent or random and whether the issue occurs for one or all users.
- The exact text of any error messages (a screen shot is best if contacting Ebix CRM by e-mail).
- Details about any recent changes made to the environment in which SmartOffice is being used. Has new network security been implemented? Is the user signing in from a new desktop or laptop computer? Has the SmartOffice administrator made changes to user rights or security settings?

The more information the user can provide, the quicker our support team can provide an accurate solution.

After gathering the necessary information, use one of the following methods to contact our support team.

E-mail: SmartOfficesupport@Ebix.com	<ul style="list-style-type: none">• 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• Turnaround time is 24 hours (Monday through Friday); however, in most cases, e-mail questions receive a reply much more quickly - usually on the same business day.
Telephone: (626) 585-3515	<ul style="list-style-type: none">• Best for urgent or complicated issues• Support center hours of operation:<ul style="list-style-type: none">○ 5:00 AM to 5:00 PM PT Monday – Thursday○ 5:00 AM to 1:30 PM PT Friday○ The department is closed on most major holidays.