

# SmartOffice®

Version 7 User Guide

PRODUCT OVERVIEW



Office Settings  
and Administration

SmartOffice® v7, Revised: 10-14-10

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# Introduction

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This guide addresses many of the questions a SmartOffice administrator may have about configuring the office. The SmartOffice administrator ensures that the SmartOffice implementation goes smoothly and that the office is up and running as quickly as possible.

For questions not addressed in this topic, see [Technical Support Information](#) for information about contacting Ebix CRM.

**Note:** Before performing office setup, the administrator should read the [Getting Started Guide](#). Each member of office who will be accessing SmartOffice should also read that guide.

Setting up data visibility rules (i.e., who can see what data in the office) is also an important part of office setup. For more information, refer to the [SmartSecurity User Guide](#).

## Configuring the Office (Office Settings)

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SmartOffice can be easily customized to meet the unique requirements of any business. This section explains how to specify default settings for the entire office, as well as default preferences for new users added to the office.

**Note:** Only users with the **Administrator: User Rights & Creation/Licenses/Groups** user right can view and modify office settings. The admin user that Ebix CRM creates for the office has these rights by default.

To access office settings, click **Setup** on the side menu and then select **Office Settings** from the expanded list of options.

Office settings are contained in the following content links:

- [Detail](#)
- [Licenses](#)
- [Security Policies](#)
- [Department/Team Hierarchy](#)
- [Default User Preferences](#)
- [Office Correspondence Options](#)
- [SmartPad/New Contact/E-mail Posting Options](#)
- [Global Proxy](#)
- [Disclaimers](#)
- [Office Record Count](#)
- [Office Access Log](#)
- [User Usage](#)
- [Carrier Subscription](#)

## Office Settings - Detail

The Detail content link in [Office Settings](#) contains basic information about the office, including contact information, status and storage information. This content link is selected by default when Office Settings are opened.

## Basic Information Section

- **Office:** The Office field is read-only for the local office administrator and is editable only by a System office administrator.
- **Office Full Name:** The full name of the office.
- **Abbreviation:** Office name abbreviation.
- **Office Status:** Indicates whether the office is active, disabled or read-only. The Office Status field is read-only for the local office administrator and is editable only by a System office administrator.
- **Street Line1, Line2, City, State/Province, ZIP/Postal Code, Country:** Main mailing address of the office.

- **E-mail Address:** The e-mail address of the office's admin user.
- **Phone #:** The main office phone number.
- **Business Fax:** The main office fax number.
- **Allow Impersonation:** Impersonation applies only when an office hierarchy is established between two or more offices using Enterprise View (refer to the [Enterprise View User Guide](#)). When this option is selected, the parent office can impersonate users in a child office. This option can be modified only by the office administrator and cannot be modified from other child offices. Clear this option to deny parent offices access to the Dynamic Report, filter, vendor, security master and product information of child offices.
- **Maximum Users:** Indicates the number of user licenses available in the office. This field is not editable; the value is determined by the number of licenses assigned and in use.
- **Active Users:** Indicates the number of users who are active within the office. This field is not editable; the value is determined by the number of licenses assigned and in use.
- **Date Format:** The default date format for the office. Users can override this setting by selecting a different date format in User Preferences.
- **Allow Alternate Login:** This field is not editable. This option is available only for offices that have created customized applications to work with SmartOffice. For more information on this feature, please contact an Ebix CRM sales representative.
- **SmartLink for iPipeline:** This option is editable only by Ebix CRM. SmartLink for iPipeline enables different carriers' product, product availability, guideline requirements, forms and other data to be downloaded into SmartOffice automatically.
- **Last Sequence No.:** This read-only field is used internally by SmartOffice for the SmartLink for iPipeline feature.
- **Import Last Sequence No.:** This read-only field is used internally by SmartOffice for the SmartLink for iPipeline feature.
- **Enable Security Within Office:** To restrict certain users in the office from viewing specific records, select this option. To enable all users in the office to view all records without restriction, clear this option. For more information, refer to the [SmartSecurity User Guide](#).
- **Protect Communication History:** When this option is selected, the following information becomes read-only once entered in SmartOffice: uploaded files, sent letters, intra-office and posted e-mail, e-mail attachments, SmartPad notes. SmartPad notes become read-only after 24 hours. For more information, refer to the [Protect Communication History User Guide](#).

## Storage Allocation Options (in MB) Section

**Note:** The information contained in these fields is for informational purposes only. It can be modified only by an Ebix CRM administrator.

- **Maximum storage per user:** Indicates the maximum allowed disk space per user.
- **Maximum Storage for Office:** This value is the Maximum Storage Per User value multiplied by the Maximum Users value.
- **Excess Storage Used:** Indicates the excess storage space currently used by the office.
- **Remaining Storage:** Indicates how much disk space is still available for use.
- **Additional Storage Purchased:** Indicates the storage purchased in addition to what has been allocated.
- **Storage Used (MB):** Indicates the current disk usage for the office.
- **As of Date:** The date when disk storage options were last updated.
- **Excess Storage Expiry Date:** Indicates the renewal date for additional storage space. If that storage is not renewed by this date, the office becomes read-only.

## Custom Fields Section

If additional fields are needed to store information about the office, the administrator can use the custom fields in this section.

Use the appropriate field type for the data to be entered (alphanumeric, integer, date or yes/no).

Click a field's **Customize Field Label** button  to enter a new name for the field.

## Send Options - Form Letters Section

**Send from:** Ebix CRM recommends that users leave this drop-down list set to the default option (Send from SmartOffice).

## SMTP Settings - Form Letters (Send Locally) Section

**SMTP Server, Port, User Name, Password, SSL:** These fields are pre-configured and are not editable when the recommended option (Send from SmartOffice) is selected in the Send Options - Form Letter section.

## SmartOffice Sync for Outlook/Lotus Notes Section

Select the office's user environment to ensure the appropriate synchronizing of activities between Outlook/Lotus Notes and SmartOffice. (This applies if users have installed SmartOffice Sync for Outlook or SmartOffice Sync for Lotus Notes.)

- **Multi-User:** This option synchronizes activities to a user's calendar only if that user is the activity's primary participant. The activity does not sync to other users' calendars until the primary participant synchronizes the activity and sends invitations to those users.
- **Stand-alone:** This option synchronizes to the user's calendar all activities in which the user is a participant.

Refer to the [SmartOffice Sync for Outlook](#) or [SmartOffice Sync for Lotus Notes](#) user guide.

## Leads Web Options Section

**Note:** This section is for offices using the SmartLeads module. To display this section, select **Menu > Enable Leads Web**.

- **Leads Web URL for this office is:** This field displays the URL to an online form that prospective clients can fill out to request information about products and services. The submitted information is then converted into a lead in SmartOffice.
- **View Source Code:** Click this button to view the HTML source code of the Leads Web form. The button makes it easier for webmasters to obtain the source code if they want to customize the form.
- **Campaign:** Click this hyperlink to associate leads submitted through the Leads Web form with a campaign. In the Search Campaigns dialog box that opens, the user can either search for an existing marketing campaign or create a new campaign.
- **Type:** This drop-down list enables the user to specify whether leads gathered through the Leads Web form are classified as advisor, contact or business leads in SmartOffice.

For more information about Leads Web, refer to the [SmartLeads User Guide](#).

## SmartResource Office Subscriptions Section

For information about this section, refer to the [SmartResource for Carrier-Plan Data User Guide](#).

## Office Settings - Licenses

The Licenses content link in [Office Settings](#) displays the types and numbers of licenses assigned to the office.

**Note:** The license types and maximums listed can be changed only by an Ebix CRM representative.

Office			
User Groups			
User Accounts			
Detail (P)   <b>Licenses</b>   Security Policies   Department/Team Hierarchy   Default User Preferences   Office Correspondence Options   >>			
Licenses			Options ▼
License Type	Maximum Licenses ↕	Licenses in Use	Number for Total System
<a href="#">AIG AppUpload</a>	0	0	2,147,483,647 ▲
<a href="#">Agency Manager</a>	15	12	12,000
<a href="#">Albridge Applink</a>	0	0	2,147,483,647
<a href="#">Albridge Webservices</a>	0	0	2,147,483,647
<a href="#">AnnuityNet</a>	0	0	2,147,483,647
<a href="#">AnnuityNet - MS</a>	0	0	50,000
<a href="#">Call Center Module</a>	0	0	12,000
<a href="#">Commissions</a>	20	5	12,000
<a href="#">Commissions - Advisor Commissions</a>	0	0	12,000
<a href="#">Commissions - Carrier Interface</a>	1	5	12,000
<a href="#">DASMS - DST</a>	0	0	200
<a href="#">DASMS - Pershing</a>	0	0	50,000
<a href="#">DASMS - Pershing Infodirect</a>	0	0	200
<a href="#">DASMS - RBC Dain</a>	0	0	50,000
<a href="#">DASREL - Cannex</a>	0	0	2,147,483,647
<a href="#">DASREL - Pershing Infodirect</a>	0	0	2,147,483,647 ▼

Click any hyperlink in the License Type column to view a list of users who currently have that license assigned. Once the list displays, the administrator can remove a license from one or more users by tagging the users and selecting **Menu > Delete 'License' record**.

Once a license is assigned to a user, it is unavailable to other users. Users retain their licenses until their [user accounts](#) are disabled or until the licenses are assigned to other users by an office administrator.

## Office Settings - Security Policies

The Security Policies content link in [Office Settings](#) defines password policies, session timeouts and other security settings for all users in the office.

**Note:** When any of these settings are changed, they do not apply to users who are currently signed in to SmartOffice. The policies take effect the next time those users sign in.

The screenshot shows the 'Security Policies' configuration page in SmartOffice. The page is divided into several sections:

- Office** (selected tab) | **User Groups** | **User Accounts**
- Detail (P) | Licenses | **Security Policies** | Department/Team Hierarchy | Default User Preferences | Office Correspondence Options | >>
- Password Policies**: Define Office specific password settings below, SmartOffice defaults in force are displayed to the right.
  - Sign in attempts allowed before lock: 3
  - Lock Duration: 1 Minute (4m30s)
  - Password Expiration (Days): 10 Days (Does not Expire)
  - Password Reuse (# of expired passwords stored): Not Kept (Not kept)
  - Required Password Length: 6
- Session Timeout**: Define the time period of inactivity allowed before a User is signed out of SmartOffice.
  - Session Timeout: 120(Minutes)
- IP Range Restriction**:
  - Enable IP range restrictions using the trusted IPs below
  - Apply these settings to SmartView for Advisors User Accounts
- Trusted IP Addresses**:

IP	Mask	Timeout (in minutes)	Description	Created On	Office Full Name
Records Shown: 0 Total Records: 0					

Note: All settings on this page will take effect after the next sign in.

### Password Policies Section

Default policies are displayed to the right of each field. If a field is left blank, the default policy applies.

See [Passwords](#) for additional information.

- **Sign in attempts allowed before lock:** Enter the number of unsuccessful sign-in attempts a user can make before the system locks that user out and prevents further sign-in attempts.
- **Lock Duration:** Enter the amount of time a user account remains locked after the maximum number of unsuccessful sign-in attempts is reached.
- **Password Expiration (Days):** The number of days a user's password remains valid before the user is forced to change it. When this time expires, the user is prompted for a new password the next time he/she signs in.
- **Password Reuse (# of expired passwords stored):** SmartOffice can remember ("keep") expired passwords for a certain amount of time and prevent users from reusing them. This forces users to select previously unused passwords when changing their passwords.

Select the amount of time that SmartOffice should keep expired passwords, or select **Not Kept** to allow users to reuse expired passwords without limitation.

- **Required Password Length:** Enter the minimum number of characters for passwords.

## Session Timeout Section

Select the period of inactivity after which SmartOffice automatically signs a user out of the system. If this field is left blank, the default (120 minutes) applies.

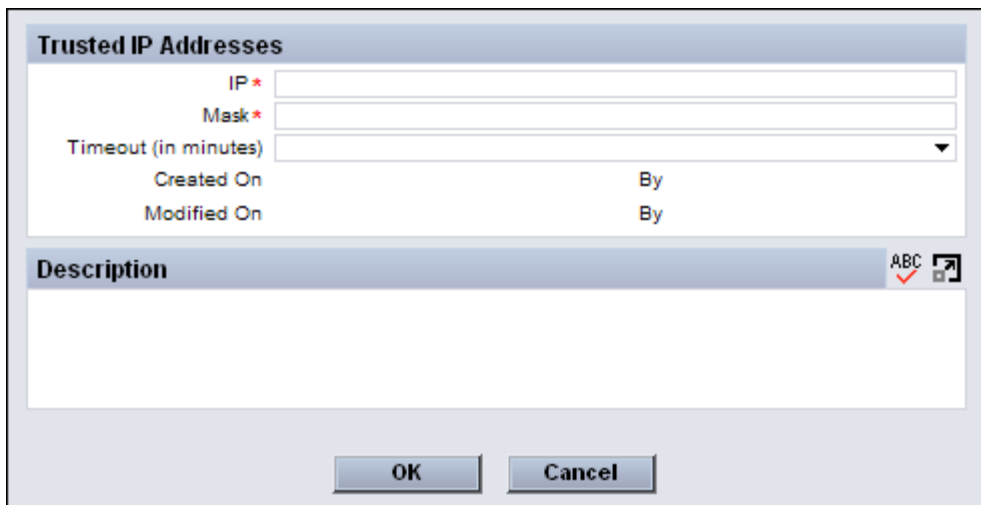
## IP Range Restriction Section

- **Enable IP range restrictions using the trusted IPs below:** This setting restricts the IP addresses from which users can sign in to SmartOffice to one or more “trusted” IP addresses. After selecting this option, the administrator must add addresses to the Trusted IP Addresses section.
- **Apply these settings to SmartView for Advisors User Accounts:** Select this option to restrict SmartView for Advisors user sign-ins in the same way that regular SmartOffice users are restricted. If this option is cleared, these users can sign in from any IP address. For more information about SmartView for Advisors, refer to the [SmartCaseManager User Guide](#).

## Trusted IP Addresses Section

This section lists the IP addresses from which users are allowed to sign in to SmartOffice if the **Enable IP range restrictions using the trusted IPs below** option is selected in the IP Range Restriction section.

Select **Options > New ‘IP Security’ record** in this section to open the Trusted IP Addresses dialog box.



Complete the fields and then click the **OK** button.

To remove an IP address from the list, tag it and then select **Options > Delete ‘IP Security’ record**.

## Office Settings - Department/Team Hierarchy

The Department/Team Hierarchy content link in [Office Settings](#) enables the administrator to create user proxy assignments by creating a hierarchy of “departments” defining what data users in the office can view. For more information about proxies, refer to the [SmartSecurity User Guide](#).



The screenshot shows a web interface for configuring office settings. The top navigation bar includes 'Office', 'User Groups', and 'User Accounts'. Below this, a breadcrumb trail shows 'Detail (P) | Licenses | Security Policies | Department/Team Hierarchy | Default User Preferences | >>'. The main content area is a table with three columns: 'Department', 'Department/Team Members', and 'Manager'. There are two rows of data:

Department	Department/Team Members	Manager
<input type="checkbox"/> Advisor Services	Phillip Anderson Randy Clarke Tom Edwards Sarah Ray Jennifer Ashton Thad Thompson	Randy Clarke
<input type="checkbox"/> Call Center Operators	Greg Laymen Mark Paladian Peter Stevens Paula Thompson Manny Silverman	Mark Paladian

**Note:** Department/team hierarchies are one method of creating proxies. The more common method is to create proxies individually from a user’s [Proxy: Whose Data This User Can See](#) content link.

### Example Hierarchy Scenario

Suppose that a team of new business clerks in an office needs access to the calendars, contacts and other data of the advisor team in the office.

Using a department/team hierarchy, the clerks could be added to a “root” department, and the advisors could be added to a department below the root department (i.e., as a “child” department). This would enable the clerks to see the data of all the advisors, but the advisors would not be able to see the data of the clerks.

In setting up the hierarchy, the administrator could also specify whether members within each department/team can proxy for each other (i.e., see each other’s data). In this example, it may be appropriate for the new business clerks to proxy for each other. However, it may not be appropriate for the advisors to proxy for each other if the advisors need to be restricted to seeing their own data only.

**Note:** Department/team hierarchies and the proxy relationships they create do not apply to Super Users, who can view all non-privatized data in the office regardless of proxies.

## Creating a Root Department/Team

1. On the Department/Team Hierarchy content link, select **Menu > New 'Root Department/Team' record** to open the Define Department/Team Hierarchy dialog box.

**Define Department/Team Hierarchy**

**Department/Team Hierarchy**

Parent Department

Child Department/Team \*

Department

Manager/Supervisor

Maximum Open Issues

Create proxy among the team members within this Department/Team

**Members in the current Department/Team** + | Options ▾

OK Cancel

2. Enter the name of the root department in the Child Department/Team field (e.g., **New Business Clerks**).
3. (Optional) Select the **Create proxy among the team members within this Department/Team** option to enable the members of this department to proxy for each other (i.e., to see each other's contacts, activities and other data).
4. In the **Members in the current Department/Team** section, select **Options > New 'User Member' record** to add users to this department.
5. When the list of users displays, tag the applicable users and then click the **OK** button.
6. Click the **Manager/Supervisor** hyperlink to add a user as the department/team manager.

**Note:** The manager/supervisor is not included when proxy relationships are created. To include the manager/supervisor in proxy creation, add that user to the department/team member list.

7. Click the **OK** button to return to the Department/Team Hierarchy content link.

## Creating a Child Department/Team

1. On the Department/Team Hierarchy content link, select a root department/team.
2. Select **Menu > New 'Department/Team Hierarchy' record**.
3. Complete the fields in the Define Department/Team Hierarchy dialog box as described in the previous section.

## Establishing Proxies Based on the Hierarchy

1. After creating departments/teams, select **Menu > Create User/Proxy using Department/User Hierarchy Definition**.
2. When asked whether to delete all manually created proxies before creating the new proxies, click the **Yes** button to delete any existing proxies or the **No** button to retain existing proxy relationships and add the new proxies to the existing ones.
3. When the confirmation message indicates that the proxies were created successfully, click the **OK** button.

## Office Settings - Default User Preferences

The Default User Preferences content link in [Office Settings](#) is used to define the preferences applied to [newly created user accounts](#). Options selected here become the default preferences for new users. These settings are only defaults, however; users can change them to suit their needs.

For more information about the individual preferences that can be configured on this content link and how users can change their own preferences, refer to the [Getting Started Guide](#).

The screenshot shows the 'Default User Preferences' configuration page in the SmartOffice interface. The page has a breadcrumb trail: Office > User Groups > User Accounts > Detail (P) > Licenses > Security Policies > Department/Team Hierarchy > Default User Preferences > >>. The main title is 'Default User Preferences'. Below the title is a toolbar with icons for help, search, and a 'Menu' dropdown. The page is divided into two main sections: 'Default Settings' and 'Cross Office Record Sharing'. The 'Default Settings' section contains several fields and dropdown menus: 'Default Area Code' (text input), 'Default Country Code' (text input), 'Default Enterprise View Mode' (dropdown menu set to 'Inside Office'), 'Date Format' (dropdown menu set to 'MM/dd/yyyy'), 'Business SmartPad View Settings' (dropdown menu set to '1. Business Only'), 'Print all PDFs in Black & White' (dropdown menu set to 'No'), and 'Default location at Login' (dropdown menu set to 'Dashboards'). The 'Cross Office Record Sharing' section contains a dropdown menu set to 'Not a Specialist'. Below this dropdown is a note: '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.'

## Office Settings - Office Correspondence Options

The settings specified in the Office Correspondence Options content link in [Office Settings](#) apply to the entire office and override any individual user's correspondence customizations.

For information about the individual settings on this content link, see refer to the [Getting Started Guide](#).

Office	User Groups	User Accounts
Detail (P)   Licenses   Security Policies   Department/Team Hierarchy   Default User Preferences   >>		
<i>Select the appropriate options as a default 'Letter Printing Option' for the current Office. In case of an automatic Workflow, these options will be used to print letters. These options can be overridden at run-time.</i>		
<b>Recipient Address Type</b> <input checked="" type="radio"/> Preferred Address <input type="radio"/> Residence Address <input type="radio"/> Business Address		<b>Default Templates</b> Envelope <input type="text"/> Header <input type="text"/> Footer <input type="text"/> MS Word Default <input type="text"/>
<b>Letters/Documents Options</b> <input type="radio"/> Display Letter Log and Document List together <input checked="" type="radio"/> Display Letter Log and Document List separately		<input checked="" type="checkbox"/> Print header on first page only. <input checked="" type="checkbox"/> Print footer on first page only.
<b>Print Output Settings</b> <input type="radio"/> Print on Local Printer <input checked="" type="radio"/> Send to Printer Queue		<b>Word Processor Selection</b> <i>Select a default application to use for composing and previewing form letters.</i> <input checked="" type="radio"/> Microsoft Word <input type="radio"/> SmartOffice Letter Editor
<b>Correspondence Options</b> <input checked="" type="checkbox"/> Print One Letter per Household <input checked="" type="checkbox"/> Post to Letter Log/SmartPad <input checked="" type="checkbox"/> Apply Contact's Mail Privacy <input type="checkbox"/> Create Follow-up Activity <input checked="" type="checkbox"/> Preview before printing <input checked="" type="checkbox"/> Send Form Letter as e-mail body <input type="checkbox"/> Use Default E-mail Signature from Outlook/Lotus Notes		<b>E-mail Attachment Options</b> <i>E-mail form letter as attachment - default file type:</i> <input type="radio"/> PDF <input type="radio"/> RTF

## Office Settings - SmartPad/New Contact/E-mail Posting

The SmartPad/New Contact/E-mail Posting content link in [Office Settings](#) specifies the events that are posted to the SmartPad as well as the default settings used when creating new contacts.

The screenshot shows the 'Office' settings page with the 'User Accounts' tab selected. The 'SmartPad Posting Options' section is active, showing a list of events to be recorded in the SmartPad. The 'New Contact Settings' section is also visible, showing options for creating a Business Key-Relationship and E-mail Posting Options. The 'Preferred Communication Default - New Records' section is set to 'E-mail'. The 'Column Descriptions Import/Export XML' section has an 'Export to XML' button.

SmartPad Posting Options	
Select the events that should be automatically recorded in the SmartPad.	
<input checked="" type="checkbox"/> Activities	<input checked="" type="checkbox"/> E-mail Sent
<input checked="" type="checkbox"/> Phone Dials Made	<input checked="" type="checkbox"/> Letters Sent
<input checked="" type="checkbox"/> Time Log	<input checked="" type="checkbox"/> Changes to Opportunity
<input checked="" type="checkbox"/> Address and Phone Modification	<input type="checkbox"/> Changes to Insurance Policy
<input checked="" type="checkbox"/> Address and Phone Deletion	<input type="checkbox"/> Changes to Investment Position
<input type="checkbox"/> Changes to Service Request	<input type="checkbox"/> Advisor Diary
<input type="checkbox"/> SMS	

New Contact Settings	
Prompt Settings for creating a Business Key-Relationship when Adding/Modifying a Contact Record.	
Add Business Key Relationship	
<input checked="" type="checkbox"/> Check for duplicate Contacts/Businesses	
<input checked="" type="checkbox"/> Assign New Contacts to the User who created them Note: Primary Advisor will also be assigned if a contact is associated with the User Account	

E-mail Posting Options	
<input checked="" type="radio"/> Post Entire E-mail - Subject & Body	
<input type="radio"/> Post E-mail Subject only	
<input type="checkbox"/> Auto-select the contact when posting subsequent e-mail messages from the same chain	

Preferred Communication Default - New Records	
<input type="radio"/> Postal Mail	
<input type="radio"/> Fax	
<input type="radio"/> E-mail	

Column Descriptions Import/Export XML	
Upload	Browse...
Export to XML	

### SmartPad Posting Options Section

Select the SmartOffice actions/events that should result in an entry being posted automatically to the SmartPad.

**Note:** Changes to opportunities, policies and investment positions apply only to users who have licenses for those modules. See [User Accounts - User Rights Content Link](#).

The following options are available:

- Activities
- Phone Dials Made
- Time Log
- Address and Phone Modification
- Address and Phone Deletion
- Changes to Service Request
- SMS
- Contact Modification

- E-mail Sent
- Letters Sent
- Changes to Opportunity
- Changes to Insurance Policy
- Changes to Investment Position
- Advisor Diary

## Preferred Communication Default - New Records Section

In this section, select the communication method—postal mail, fax or e-mail—that should be selected as the default preferred communication method for new records.

The preferred communication setting can be viewed or edited in the following locations:

- Add'l Personal content link (contacts)
- Add'l Detail content link (businesses, advisors, agencies)
- Detail content link (carriers)

## New Contact Settings Section

- **Prompt Settings for creating a Business Key-Relationship when Adding/Modifying a Contact Record:** When creating or modifying a contact, the user can link the contact to a previously created business (in the New - Contact dialog box, this is done using the Lookup button next to the Company field). This drop-down list specifies whether the business is also added as a key relation on the contact record.
- **Check for duplicate Contacts/Businesses:** When this option is selected, a warning displays if a user is creating a contact or business that already exists in the office.
- **Assign New Contacts to the User who created them:** When this option is selected, each new contact is assigned to the user who created it. This can have significant implications depending on how [office security](#) is configured (refer to the [SmartSecurity User Guide](#)). If this option is not selected, the user is prompted while creating a contact to assign the contact to one, selected or all SmartOffice users.

**Note:** Select this option if there is only one user in the office.

## E-mail Posting Options

These options relate to SmartMail E-mail Posting.

- **Post Entire E-mail - Subject & Body:** Both the subject and e-mail message body are posted to the SmartPad.
- **Post E-mail Subject only:** Only the e-mail message subject is posted to the SmartPad.
- **Auto-select the contact when posting subsequent e-mail messages from the same chain:** When this option is selected, e-mail sent from SmartOffice will have a “context ID” (e.g., contact ID, policy number, case number) appended to the subject of each e-mail message. This context ID identifies and connects threaded messages. When this option is not selected, e-mail sent from SmartOffice has no context ID appended to the subject.

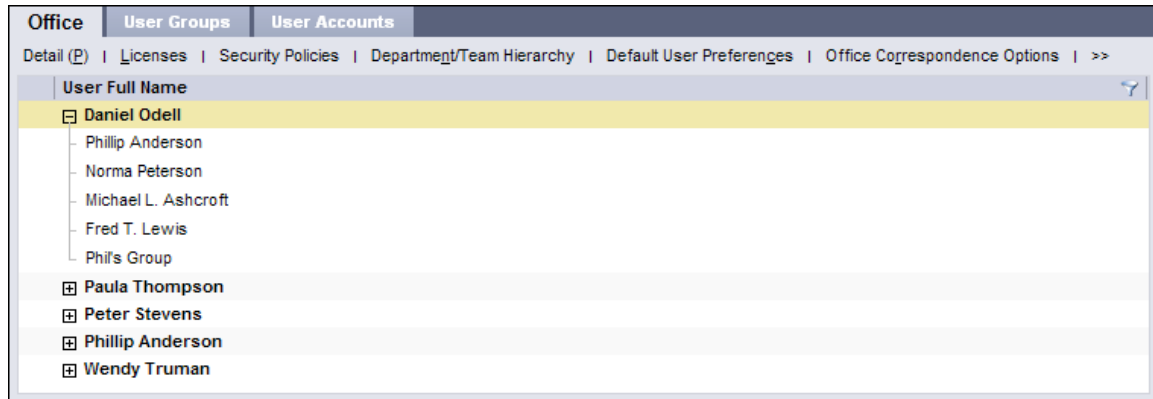
## Column Descriptions Import/Export XML Section

Users can import and export layouts for lists they have customized at the user and office levels. This feature enables an office to share all of its customized list layouts with other offices.

Click the **Export to XML** hyperlink to export customized layouts to an XML file that can be sent to other offices. Click the **Browse** button to locate and import an XML file sent from another office.

## Office Settings - Global Proxy

The Global Proxy content link in [Office Settings](#) displays a list of proxies created in SmartOffice. Proxies specify which other users' data a user can see. For information about proxies, refer to the [SmartSecurity User Guide](#).



This content link is for informational purposes only and cannot be edited. To edit proxy relationships, go to either of the following:

- [Office Settings - Department/Team Hierarchy](#)
- [User Accounts - Proxy: Whose Data This User Can See](#)

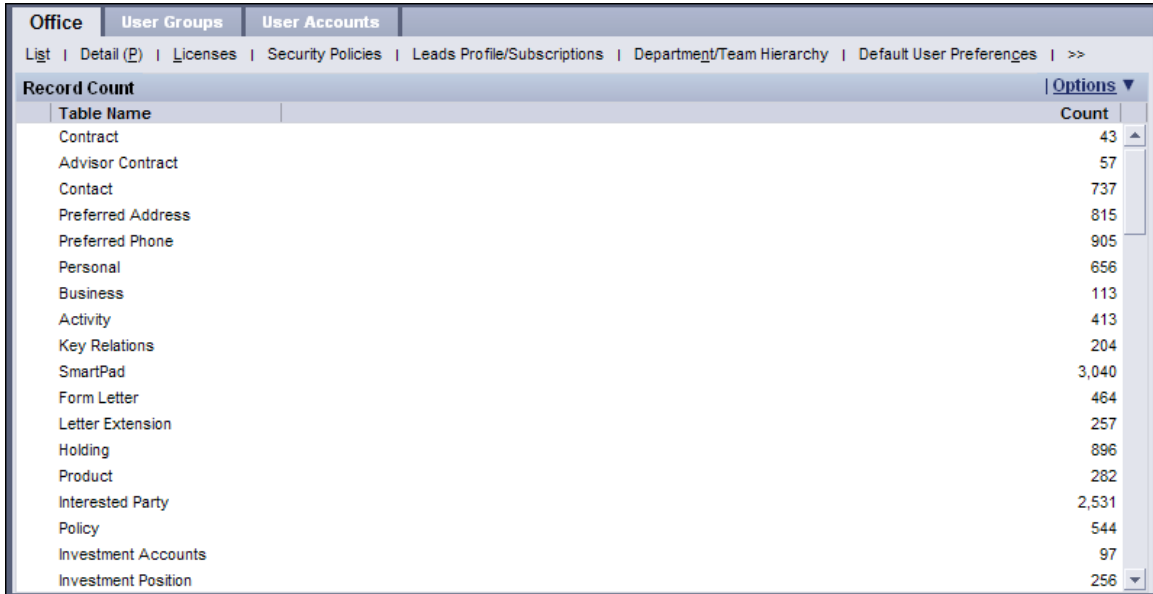
## Office Settings - Disclaimers

The Disclaimers content link in [Office Settings](#) enables an administrator to create standard disclaimers that are inserted into e-mail messages and faxes sent through SmartOffice.

Office	User Groups	User Accounts
Detail (P)   Licenses   Security Policies   Department/Team Hierarchy   Default User Preferences   >>		
<b>E-mail Disclaimer</b>		ABC ✓
The information contained in this message may be CONFIDENTIAL and is for the intended addressee only. Any unauthorized use, dissemination of the information, or copying of this message is prohibited. If you are not the intended addressee, please notify the sender immediately and delete this message.		
<b>Fax Disclaimer</b>		ABC ✓
The information contained in this fax may be CONFIDENTIAL and is for the intended addressee only. Any unauthorized use, dissemination of the information, or copying of this fax is prohibited. If you are not the intended addressee, please notify the sender immediately and delete this message.		

## Office Settings - Office Record Count

The Office Record Count in [Office Settings](#) simply displays the number of each type of record that exists in the database. This content link is for informational purposes only.



The screenshot shows a software interface with a navigation bar at the top containing tabs for 'Office', 'User Groups', and 'User Accounts'. Below the navigation bar is a breadcrumb trail: 'List | Detail (P) | Licenses | Security Policies | Leads Profile/Subscriptions | Department/Team Hierarchy | Default User Preferences | >>'. The main content area is titled 'Record Count' and features a table with two columns: 'Table Name' and 'Count'. An 'Options' dropdown menu is located in the top right corner of the table area. The table lists 18 different record types and their corresponding counts.

Table Name	Count
Contract	43
Advisor Contract	57
Contact	737
Preferred Address	815
Preferred Phone	905
Personal	656
Business	113
Activity	413
Key Relations	204
SmartPad	3,040
Form Letter	464
Letter Extension	257
Holding	896
Product	282
Interested Party	2,531
Policy	544
Investment Accounts	97
Investment Position	256

To view this information categorized by user, go to [Office Settings - User Usage](#).

## Office Settings - Office Access Log

The Office Access Log content link in [Office Settings](#) maintains a record of the user sign-ins and sign-outs, including times, the IP address from which they signed in and the lengths of their sessions.

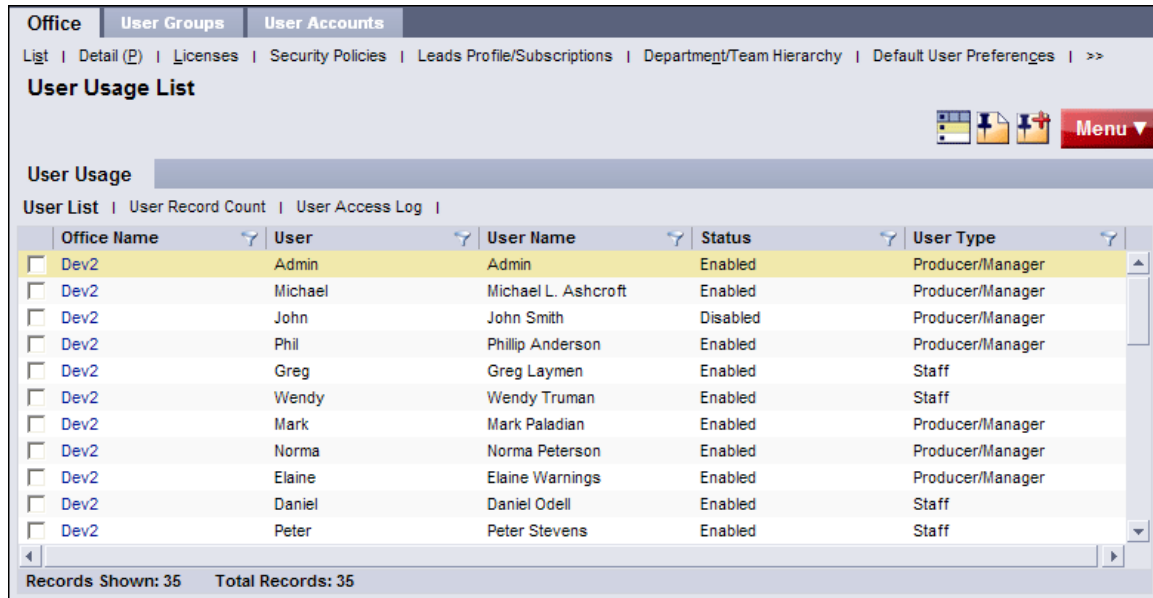
Office						
User Groups		User Accounts				
<a href="#">List</a>   <a href="#">Detail (P)</a>   <a href="#">Licenses</a>   <a href="#">Security Policies</a>   <a href="#">Leads Profile/Subscriptions</a>   <a href="#">Department/Team Hierarchy</a>   <a href="#">Default User Preferences</a>   >>						
Access Log						Options
<input type="checkbox"/>	User Full Name	IP Address	Sign in Time	Sign out/Time out	Elapsed Minutes	
<input type="checkbox"/>	Daniel Odell	192.168.65.214	08/19/2010 09:02AM			
<input type="checkbox"/>	Daniel Odell	192.168.65.214	08/18/2010 02:12PM	08/18/2010 05:30PM	198	
<input type="checkbox"/>	Daniel Odell	192.168.65.214	08/16/2010 04:52PM	08/16/2010 05:04PM	12	
<input type="checkbox"/>	Norma Peterson	192.168.65.214	08/16/2010 04:51PM	08/16/2010 04:52PM	0	
<input type="checkbox"/>	Daniel Odell	192.168.65.214	08/16/2010 04:51PM	08/16/2010 04:51PM	0	
<input type="checkbox"/>	Daniel Odell	192.168.65.214	08/16/2010 03:36PM	08/16/2010 04:51PM	74	
<input type="checkbox"/>	Daniel Odell	192.168.65.214	08/16/2010 08:26AM			
<input type="checkbox"/>	Daniel Odell	192.168.65.214	08/13/2010 10:12AM	08/13/2010 05:02PM	410	
<input type="checkbox"/>	Daniel Odell	192.168.65.214	08/12/2010 03:38PM	08/12/2010 05:07PM	88	
<input type="checkbox"/>	Daniel Odell	192.168.65.214	08/12/2010 03:37PM	08/12/2010 03:38PM	1	
<input type="checkbox"/>	Daniel Odell	192.168.65.214	08/12/2010 12:35PM	08/12/2010 12:57PM	21	
<input type="checkbox"/>	Thad Thompson	192.168.65.214	08/12/2010 12:08PM	08/12/2010 12:35PM	27	
<input type="checkbox"/>	Daniel Odell	192.168.65.214	08/12/2010 12:05PM	08/12/2010 12:08PM	2	
<input type="checkbox"/>	Daniel Odell	192.168.65.214	08/12/2010 12:03PM	08/12/2010 12:05PM	2	
<input type="checkbox"/>	Daniel Odell	192.168.65.214	08/12/2010 11:08AM	08/12/2010 11:09AM	0	
<input type="checkbox"/>	Daniel Odell	192.168.65.214	08/12/2010 11:05AM	08/12/2010 11:06AM	1	

Records Shown: 50   Previous 1   Next   View More   Record Count

To view this information categorized by user, go to [Office Settings - User Usage](#).

## Office Settings - User Usage

The User Usage content link in [Office Settings](#) provides information about the number of records associated with each user in the system as well as each user's sign-in history.



The screenshot displays the 'User Usage List' interface. At the top, there are navigation tabs for 'Office', 'User Groups', and 'User Accounts'. Below these are several menu items: 'List', 'Detail (P)', 'Licenses', 'Security Policies', 'Leads Profile/Subscriptions', 'Department/Team Hierarchy', and 'Default User Preferences'. The main title is 'User Usage List'. Below the title, there are icons for a window, a printer, a refresh, and a 'Menu' dropdown. The main content area is titled 'User Usage' and contains a sub-menu with 'User List', 'User Record Count', and 'User Access Log'. The 'User List' is active, showing a table with the following columns: 'Office Name', 'User', 'User Name', 'Status', and 'User Type'. The table contains 12 rows of user data. The first row is highlighted in yellow. At the bottom of the table, it says 'Records Shown: 35' and 'Total Records: 35'.

	Office Name	User	User Name	Status	User Type
<input type="checkbox"/>	Dev2	Admin	Admin	Enabled	Producer/Manager
<input type="checkbox"/>	Dev2	Michael	Michael L. Ashcroft	Enabled	Producer/Manager
<input type="checkbox"/>	Dev2	John	John Smith	Disabled	Producer/Manager
<input type="checkbox"/>	Dev2	Phil	Phillip Anderson	Enabled	Producer/Manager
<input type="checkbox"/>	Dev2	Greg	Greg Laymen	Enabled	Staff
<input type="checkbox"/>	Dev2	Wendy	Wendy Truman	Enabled	Staff
<input type="checkbox"/>	Dev2	Mark	Mark Paladian	Enabled	Producer/Manager
<input type="checkbox"/>	Dev2	Norma	Norma Peterson	Enabled	Producer/Manager
<input type="checkbox"/>	Dev2	Elaine	Elaine Warnings	Enabled	Producer/Manager
<input type="checkbox"/>	Dev2	Daniel	Daniel Odell	Enabled	Staff
<input type="checkbox"/>	Dev2	Peter	Peter Stevens	Enabled	Staff

The list displays all users in the office. Tag a user in the list and then select one of the following sub-content links:

- **User Record Count:** Lists the total number of records of each type associated with the tagged user.
- **User Access Log:** Displays the sign-in and sign-out history of the tagged user, including times, IP addresses and session lengths.

## Office Settings - Carrier Subscription

For information about this content link, refer to the [SmartResource for Carrier-Plan Data User Guide](#).

## Office Security (SmartSecurity)

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Office security (also known as SmartSecurity) enables a set of rules that regulate data visibility, i.e., who can see what data in the office. Understanding office security in SmartOffice is important to configuring the office so that it meets the requirements of a business.

For a complete description of office security settings, refer to the [SmartSecurity User Guide](#).

**Note:** Office security applies only to data visibility, not access to SmartOffice modules or features or office security policies (e.g., password expiration and IP address restrictions).

Access to modules is configured in [User Accounts](#), while security policies are configured in [Office Settings](#).

## User Accounts

---

Every SmartOffice user has a user account. User account settings determine a user's level of access to the system and the SmartOffice modules, records and features the user can access. It also contains user preferences related to calendar activities, alerts, correspondence and other features.

**Note:** Only users with the **Administrator: User Rights & Creation/Licenses/Groups** or **Administrator: User Rights/Groups** user right can view and modify user accounts.

When Ebix CRM creates an office, an administrator user account is created. This user account has full rights to [create additional users](#), [assign user rights and licenses](#), and [create user groups](#). The sign-in information for the administrator arrives by e-mail. Make sure to [change the password](#) for this user account and keep it confidential.

## User Rights Templates

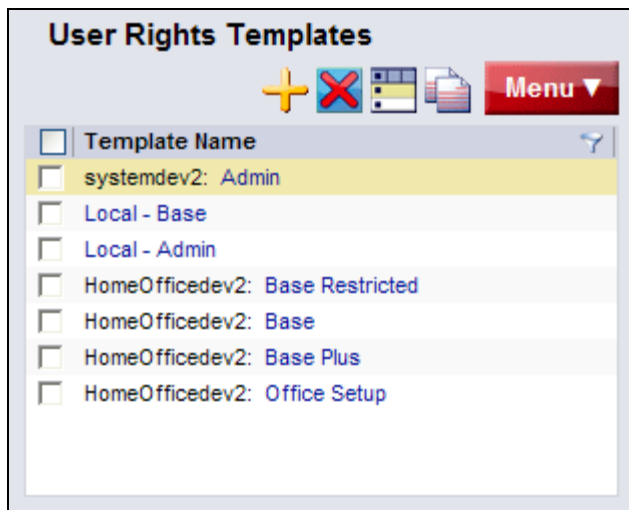
User rights templates are sets of standard [user rights](#). When [creating user accounts](#), the administrator assigns a template to each new account. In this way, templates eliminate the need to manually assign user rights for each new account.

**Note:** Only users with the **Administrator: User Rights & Creation/Licenses/Groups** or **Administrator: User Rights/Groups** user right can manage user rights templates. See [User Accounts - User Rights Content Link](#).

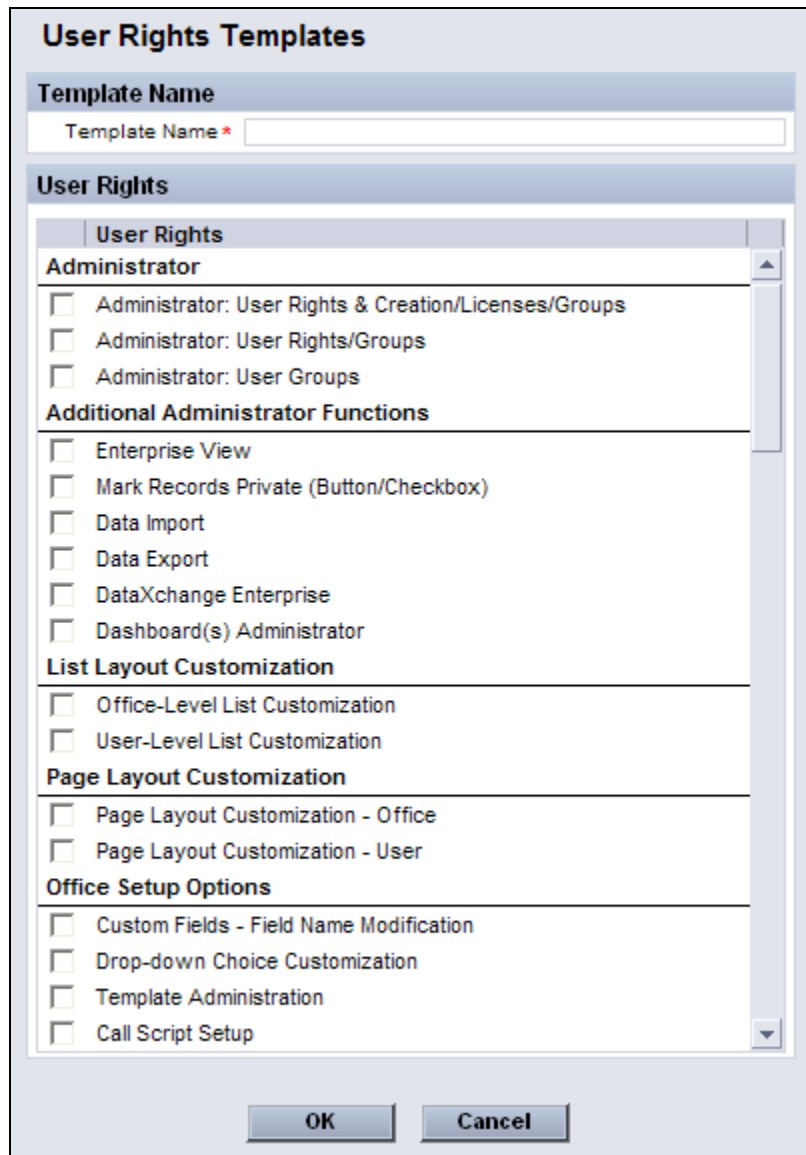
## Creating User Rights Templates

When creating a user rights template, the administrator defines a template name and specifies user rights.

1. Select **User Rights Templates** from the expanded **Setup** menu to open the User Rights Templates dialog box.



2. Click the **New 'Role Template' record** button to display the next User Rights Templates dialog box.



The image shows a dialog box titled "User Rights Templates". At the top, there is a section labeled "Template Name" with a text input field containing "Template Name \*". Below this is a section labeled "User Rights" which contains a list of checkboxes grouped into several categories: "Administrator" (with sub-items: Administrator: User Rights & Creation/Licenses/Groups, Administrator: User Rights/Groups, Administrator: User Groups), "Additional Administrator Functions" (with sub-items: Enterprise View, Mark Records Private (Button/Checkbox), Data Import, Data Export, DataXchange Enterprise, Dashboard(s) Administrator), "List Layout Customization" (with sub-items: Office-Level List Customization, User-Level List Customization), "Page Layout Customization" (with sub-items: Page Layout Customization - Office, Page Layout Customization - User), and "Office Setup Options" (with sub-items: Custom Fields - Field Name Modification, Drop-down Choice Customization, Template Administration, Call Script Setup). At the bottom of the dialog box are two buttons: "OK" and "Cancel".

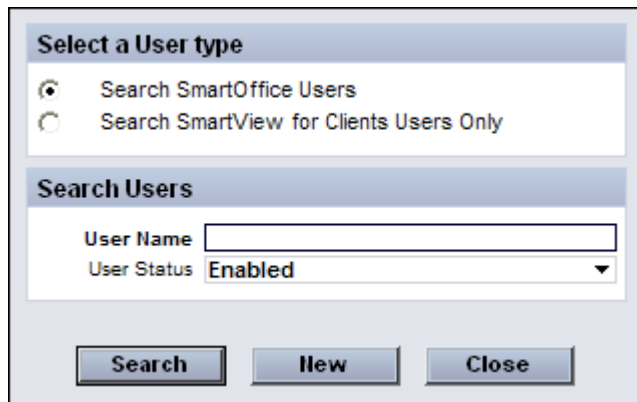
3. Enter the template name.
4. Select the appropriate user rights.
5. Click the **OK** button.

## Creating User Accounts

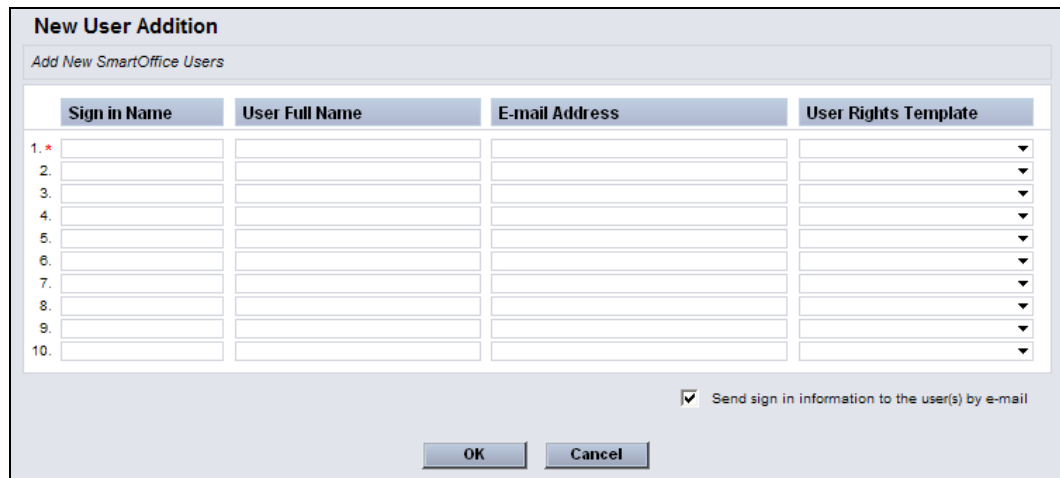
To create [user accounts](#), begin by making a list containing each person's user name, sign-in name, e-mail address and other relevant information. The [User List Worksheet](#) can be used to gather this information.

**Note:** Only users with the **Administrator: User Rights & Creation/Licenses/Groups** user right can view and modify user accounts. See [User Accounts - User Rights Content Link](#).

1. Create at least one user rights template if no templates exist. See [User Rights Templates](#).
2. Select **User Accounts** from the expanded **Setup** menu to open the Select a User Type dialog box.



3. Click the **New** button to display the New User Addition dialog box.



	Sign in Name	User Full Name	E-mail Address	User Rights Template
1.*				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

This dialog box enables the creation of up to 10 user accounts.

4. Enter a unique sign-in name for each user. This is the name the user will enter in the User Name field when signing into SmartOffice.

5. Enter the full name of each user (e.g., Tom Smith).
6. Enter each user's e-mail address. This is the address to which each user's temporary password will be sent if the **Send sign-in information to the user(s) by e-mail** option is selected. This is also the e-mail address that SmartOffice uses when sending password change notifications to users.
7. Specify a user rights template for each user by selecting a template from the drop-down list.
8. Click the **OK** button.

Once the accounts are created, the administrator can [edit the individual accounts](#) to make user-specific changes.

## Passwords

Every SmartOffice user enters a password when signing in to SmartOffice.

When an administrator [creates a user account](#), SmartOffice automatically creates a temporary password for the user. The user uses this password when signing in for the first time. After signing in, SmartOffice prompts the user to create a new password for security purposes.

A user's password can be changed by the user or by the administrator. SmartOffice also has a mechanism for handling forgotten passwords.

## Password Criteria

In SmartOffice, a password:

- Must be at least 6 characters in length.
- Must contain at least one alphabetical and one numerical character.
- Must not be the same as the user name.

In addition to these requirements, users should strive to enhance the security of their user accounts by choosing passwords that are easy to remember yet difficult for others to guess.

## Changing a Password

### Administrator

When an administrator changes a user's password, the system creates a new temporary password for the user, who must then sign in and create a new password.

1. Search for the user's account.
2. Select the user account in the list of results (or open the user account) and then select **Menu > Reset Password**.
3. When the confirmation message displays, click the **Send** button to send an e-mail notification to the user, or click the **Do Not Send** button to prevent a notification from being sent.

**Note:** Note the temporary password in the confirmation message before clicking the **Do Not Send** button.

## User

A user can change his/her own password as follows:

1. Open User Preferences.
2. Click the **Basic Info** content link.
3. Select **Menu > Change Password** to open the Change Password dialog box.

**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**

4. Enter the current and new passwords in the appropriate fields.
5. In the Password Reminder section, enter a question and answer that can be used if the password is forgotten. For more information about password questions, see User Preferences - Basic Info.
3. Click the **Change** button.

## Forgotten Passwords

To reset a forgotten password, ask an administrator to change it or follow the steps below:

1. Go to the SmartOffice sign-in page.
2. Click the **Forgot Password?** hyperlink.
3. Follow the instructions.

## Viewing and Editing User Accounts

After searching for a user account, a user with administrator rights can view or change the details, user rights, licenses, user groups and other information.

**Note:** Only users with the **Administrator: User Rights & Creation/Licenses/Groups** or **Administrator: User Rights/Groups** user right can view and modify user accounts. See [User Accounts - User Rights Content Link](#).

Click the content links across the top of the User List to display user account information. The content links are:

- [Detail](#)
- [User Rights](#)
- [Permissions](#)
- [User Preferences](#)
- [Leads Profile/Subscriptions](#)
- [Proxy: Whose Data This User Can See](#)
- [Proxy: Who Can See this User's Data](#)
- [User Groups](#)

## User Accounts - Detail Content Link

The Detail content link in [User Accounts](#) lists the user's general information, user type and calendar access options. Change the user's type, make the user responsible for the Print Queue and control the user's ability to create and view the activities of other users from this content link.

The screenshot shows the 'User Account Settings - Daniel Odell' interface. It features a navigation bar with 'Office', 'User Groups', and 'User Accounts' tabs. Below the navigation bar are links for 'List', 'Detail (P)', 'User Rights', 'Permissions', 'User Preferences', 'Leads Profile/Subscriptions', and 'Proxy: Whose data this User can see'. The main content area is divided into several sections: 'User's General Information' with fields for User Name (Daniel), Full Name (Daniel Odell), Contact Record for this User (Daniel Odell), and E-mail Address (sodemo@ez-data.com); 'User Type' with User Status (Enabled), User Type (Staff), and Super User (checked); 'SmartOffice Access Hours' with From and To fields and Time Zone (GMT - 7:0 Pacific Time (US & Canada)); 'Calendar Access Options' with radio buttons for 'Restrict Activity Creation to Self' and 'Allow Activity Creation for Multiple Users', and a dropdown for 'View other Users' Calendars (Yes); and 'Custom Fields' with three sets of fields: AlphaNum1-3, Int1-3, and Date1-3, each with a Yes/No checkbox.

The Detail content link contains the following sections and fields:

### User's General Information

- **User Name:** The user name is specified when the user is created. It is the permanent sign-in ID for the user and should be 2 to 20 alphanumeric characters in length.
- **Full Name:** The user's full name, useful for distinguishing between user accounts.
- **Contact Record for this User:** Click this hyperlink to link the user account to an existing SmartOffice contact record. If no contact record exists for the user, create a contact first. Linking a user account to a contact record is critical to taking full advantage of user-related merge codes (e.g., name, title, address, phone numbers, etc.) available for writing letters. If this user is an advisor, link the corresponding advisor record to enable agent-specific merge codes.
- **E-mail Address:** Enter an e-mail address to which important information e-mail messages can be sent. This is the address used to receive password/sign-in information and Outlook sync account verification. It is also the From/Reply To address for outgoing e-mail messages.

- **Default User Group:** This field determines which group of custom fields the user has access to when signed in to SmartOffice. SmartOffice enables the creation of 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.
- **Responsible for Print Queue:** If this user is responsible for printing for the office, select this option and then select a printer from the SmartOffice Printer Queue drop-down list that displays. When other users in the office select Print on Printer Queue as a letter output option, the print job is sent to the Job Queue of this user, who is alerted that there is a job in the queue awaiting processing. This feature is especially useful for remote or traveling employees who do not have access to a printer or to letterhead.
- **Send Performance Feedback to Ebix:** This option enables Ebix to gauge performance of the system in order to determine needed improvements.

## User Type

- **User Status:** There are three user statuses in SmartOffice: Enabled, Disabled and Temporary Password. The status is set to Temporary Password when a user is created or when a user's password is reset. The status changes to Enabled once the user has signed in. Users cannot be deleted from SmartOffice, because their notes, activities and other records would also be deleted. If an employee has left the company or is no longer accessing SmartOffice, change the user's status to Disabled. Disabled users cannot sign in to SmartOffice.

<p><b>Note:</b> A user cannot change his or her own account status.</p>
---

- **User Type:** This type is used internally to identify whether the user is a producer/manager, staff member or wholesaler. Select **Producer/Manager** for all advisors to ensure that advisor merge codes are used for letters.
- **Super User:** A user designated as a Super User bypasses all proxies and assignments in SmartOffice and can see everyone's data regardless of assignment, except for private records to which the user has not been granted access. For more information, refer to the [SmartSecurity User Guide](#).

## SmartOffice Access Hours

The user can be restricted to using SmartOffice only during certain hours of the day. To set up such a restriction, click the **Pick Date** buttons on the From and To fields to select the appropriate times.

## Calendar Access Options

Calendar view and access options determine whether the user can:

- Create activities that include other users as participants.
- View the calendars of other users in the office (available only to users with administrator rights).

Select one of the following options:

- **Restrict Activity Creation to Self Only:** When this option is selected, the user can create activities that include only him/herself as a participant. This restriction overrides the Default Activity Participants preference specified for all users in the office (see [Office Settings](#)).
- **Allow Activity Creation for Multiple Users:** This option enables the user to create activities that include other users as participants (this is the default setting for new users created in SmartOffice).


Select one of the following options from the **View other Users' Calendars** drop-down list:

- **No:** This option prevents the user from viewing other users' calendars. The Show Other Users' Calendars hyperlink does not display next to the user's name in the various calendar views.
- **Yes:** This option enables the user to view the calendars of all users whose status is either Enabled or Temporary Password. The user cannot view the activities of Disabled users.
- **Yes (All Statuses):** This option enables the user to view the calendar of other users regardless of user account status. This includes users with a status of Disabled.

## Custom Fields

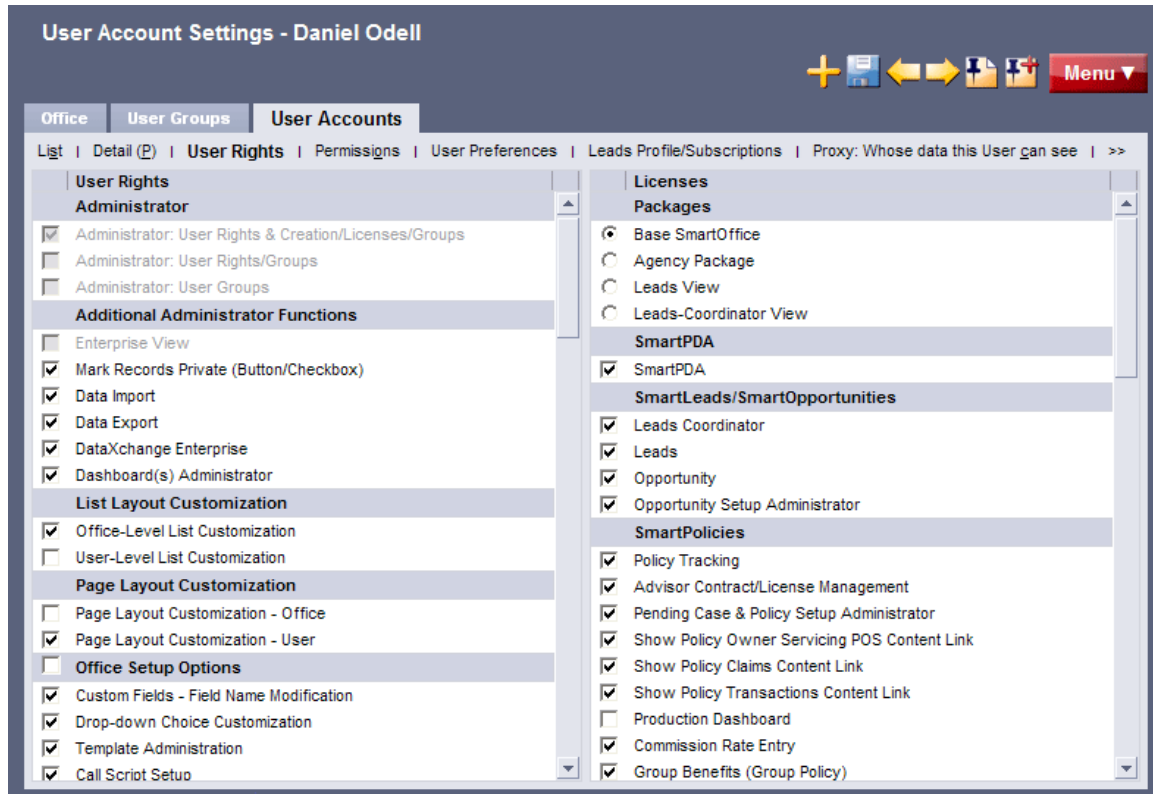
If additional fields are needed to store information about the user, the administrator can use the custom fields in these sections.

Use the appropriate field type for the data to be entered (alphanumeric, integer, date or yes/no).

Click a field's **Customize Field Label** button  to enter a new name for the field.

## User Accounts - User Rights Content Link

The User Rights content link, accessible from [User Accounts](#), specifies the SmartOffice modules and features that the user is allowed to access.



Access to specific features is configured in the User Rights column, while access to modules is configured in the Licenses column.

Every user must be assigned user rights to perform certain functions within an office. Before [creating user accounts](#), become familiar with these rights, and then create [user rights templates](#) (i.e., groups of user rights) to apply to new users.

Note the following when configuring user rights and licenses:

- To make changes in the Licenses column, the user must have the **Administrator: User Rights & Creation/Licenses/Groups** user right. Otherwise, the Licenses column is read-only and cannot be edited.
- If a license option is disabled, the module has not been purchased or the number of licenses available in the office has been exceeded.
- If any changes are made, click the **Save** button to record the changes.

The sections and options in each column are described below.

## User Rights

### Administrator

- **Administrator: User Rights & Creation/Licenses/Groups:** Enables access to user rights, license and user group administration functions.
- **Administrator: User Rights/Groups:** Enables access to user rights and user group administration functions only.
- **Administrator: User Groups:** Enables access to group administration functions only.

**Note:** When Ebix CRM creates an office, an administrator user account is created. This user account has full rights to [create additional users](#), assign user rights and licenses, and [create user groups](#). The sign-in information for the administrator arrives by e-mail. Make sure to [change the password](#) for this user account and keep it confidential.

### Additional Administrator Functions

- **Enterprise View:** For those organizations that have established an office hierarchy, this enables the user to view offices below the signed-in office within that hierarchy. For more information, refer to the [Enterprise View User Guide](#).
- **Mark Records Private (Button/Checkbox):** Enables the user to privatize records such as filters, Dynamic Reports, contacts, SmartPad entries and activities.
- **Data Import:** Enables the user to import contacts and other data into the system using the Data Import Wizard. This user right also controls the ability to import filters and Dynamic Reports. For more information, refer to the [Data Import User Guide](#).
- **Data Export:** Enables the user to export lists of records throughout SmartOffice using the Export List feature. This user right also controls the ability to export filters and Dynamic Reports.
- **DataXchange Enterprise:** Enables access to the DataXchange option in the side menu, enabling the user to monitor and control processing as well as run reports and resolve processing errors for DataXchange Enterprise.
- **Dashboard(s) Administrator:** Enables the user to create and manage collections of portlets for home page tabs and to designate tabs for use throughout the office. For more information, refer to the [Home Page User Guide](#).

## List Layout Customization

- **System-level List Customization:** Enables the user to customize list layouts for everyone in Enterprise View.
- **Office-level List Customization:** Enables the user to customize list layouts for the entire office.
- **User-level List Customization:** Enables the user to customize his/her own list layouts.

For more information, refer to the [List Layout Customization User Guide](#).

## Page Layout Customization

- **Page Layout Customization - Office:** Enables the user to apply custom page layouts for contacts and other records either to his/her own user account or to those of other users in the office.
- **Page Layout Customization - User:** Enables the user to apply custom page layouts for contacts and other records only to his/her own user account.

Selecting either user right enables the **Menu > Page Layouts** option, which the user can select while viewing a contact, business, advisor, agency or pending case.

## Office Setup Options

- **Custom Fields - Field Name Modification:** Enables the user to customize the field labels on Custom content links.
- **Drop-down Choice Customization:** Enables the user to add and modify choices in drop-down lists.
- **Template Administration:** Enables the user to add, modify and delete form letters, labels, envelopes and templates.
- **Call Script Setup:** Enables the user to create, modify and delete call scripts.
- **Key Relations - Relationship Setup:** Enables the user to modify key relationship lookups.
- **Correspondence - Faxing:** Enables the user to fax letters.
- **Access to Data Validation:** Enables the **Menu > Validate Tagged Contacts** option from the Contact List. With this option, the user can check the accuracy of information such as date of birth and benefit and investment holding amounts.
- **User Assignment for Records:** Enables the user to assign contacts to other users even if the user is not listed in the User Assignment list for the contact. For more information, refer to the [SmartSecurity User Guide](#).
- **Cross Office Record Sharing:** Enables the user to share records with users in other offices (applies only to Enterprise View users).

- **Job Queue Agent Setup:** Enables the user to add, modify, and delete jobs related to printing and transmitting letters and faxes. For more information, refer to the [Job Queue User Guide](#).
- **Check Job Status:** Enables the user to view the status of existing letter and fax jobs in the queue. For more information, refer to the [Job Queue User Guide](#).
- **Marketing Campaigns:** Displays the Marketing Campaigns option in the side menu (under Sales & Marketing), which enables the user to design and manage marketing efforts. The campaign management system tracks campaign details and monitors the Leads and Opportunities generated through campaigns to measure their effectiveness. For more information, refer to the [SmartCampaigns User Guide](#).
- **Presale Activity/Proposals:** Enables the Presale Activities/Proposals tab for contacts, advisors and other records. For more information, refer to the [SmartCaseManager User Guide](#).
- **Record Alert Creation:** Enables the user to create alerts for contacts, businesses and other records. The alerts notify other users about important information regarding that record.
- **Mass Area Code Change (Side Menu):** Displays the Area Code Change option under the expanded Utilities menu.

## Reporting Options

- **Adobe PDF Reports (Button):** Enables the user to run already-defined PDF Reports. For more information, refer to the [PDF Reports User Guide](#).
- **Dynamic Reports:** Enables the user to add, modify and delete Dynamic Report definitions. For more information, refer to the [Filters, Sets and Dynamic Reports User Guide](#).
- **Filter Setup:** Enables the user to add, modify and delete filters. For more information, refer to the [Filters, Sets and Dynamic Reports User Guide](#).
- **Excel Template Setup:** Enables the user to add, modify and delete Excel templates. For more information, refer to the [Excel Reports User Guide](#).
- **Reporting on Multiple Users' Data:** Enables the user to select multiple users for reporting. If not selected, the user can run reports for only one user at a time.
- **Crystal Reports:** Enables the user to run already-defined Crystal Reports.
- **Run Dynamic Reports with Excel Templates:** Enables the user to export the results of a Dynamic Report to an Excel template. For more information, refer to the [Excel Reports User Guide](#).
- **Crystal/PDF Report Administrator:** Enables rights to add custom PDF or Crystal Reports and set up custom settings for existing packaged PDF and Crystal Reports.
- **Marketing Options - Button on Lists:** Displays the Marketing Options button on the Contact List and for contact-related Dynamic Reports. The button enables the user to

invite the selected contact to an event or add the contact to a marketing campaign. For more information, refer to the [SmartCampaigns User Guide](#).

### Mass Operation

- **Mass Deletion:** Enables the user to delete multiple records (e.g., contacts, advisors) at the same time. Without this right, the user must delete records one at a time.
- **Mass Modification:** Enables the user to modify multiple contacts, advisors or other records at the same time (for example, to change the gender of two or more contacts to Female).
- **Mass Correspondence:** Enables the user to send correspondence to all contacts, contacts that meet certain filtering criteria or contacts within specific sets. For more information, see Mass Correspondence.
- **Mass Activity Creation:** Enables the user to create activities for more than one user at the same time. For more information, refer to the [SmartCalendar User Guide](#).
- **Mass Assignments:** Enables the user to assign multiple contacts to one or more users in the office. The contacts can be selected manually or by filter or set. For more information, refer to the [SmartSecurity User Guide](#).

### E-mail Integrations

- **SmartMail for Outlook E-mail:** Enables the user to post e-mail messages to the SmartOffice SmartPad directly from Microsoft Outlook. For more information, refer to the [Getting Started Guide](#).
- **SmartMail for Lotus Notes E-mail Posting:** Enables the user to post e-mail messages to the SmartOffice SmartPad directly from Lotus Notes. For more information, refer to the [Getting Started Guide](#).

**Note:** Only one of these user rights can be selected. They cannot both be enabled.

### Contact-Calendar Synchronizations

- **SmartOffice Sync for Outlook:** Enables the user to synchronize SmartOffice contacts and activities with Microsoft Outlook. For more information, refer to the [SmartOffice Sync for Outlook User Guide](#).

### QuickSync - Contact/Calendar

- **QuickSync for Outlook:** Enables the user to synchronize contact, activity and task information with Microsoft Outlook. For more information, refer to the [QuickSync for Outlook User Guide](#).

## Advanced Contact Management Features

- **Export contacts to another office - Button:** Enables the user to copy contacts from one office to another.
- **SmartView for Clients - Buttons:** Enables the SmartView for Clients Setup option in the expanded Setup menu. For more information, refer to the [SmartInvestments User Guide](#).
- **Convert Contact Type - Button:** Enables the user to convert among the different contact types (i.e., contacts, businesses, advisors and agencies).
- **Contact Copy - Button:** Enables the user to quickly create a duplicate of a contact, business, advisor or agency.
- **Expenses:** Enables the Expenses content link for contacts. This feature tracks costs incurred for a contact, such as gifts, food and transportation.
- **Show Business Hierarchy - Button:** Enables the viewer to display a tree view of the hierarchy of contacts within a business.
- **Household-Key Relations Sync - Button:** Displays the Household – Key Relations Sync option in the expanded Menu list at the household level, enabling the user to choose whether to synchronize household members to key relations or vice versa.
- **Merge Contacts - Button:** Displays the Merge Contacts option on the expanded Menu list at the contact level. This button enables the user to transfer information from one contact (the “source”) to another (the “target”) and resolve any conflicts.
- **Activity Outcome - Button:** Displays the **Menu > Activity Options > Activity Outcome** option for a contact, enabling the user to link the outcome with a new or existing activity. For more information, refer to the [SmartCalendar User Guide](#).
- **Find Contacts with Matching Profile - Button:** Enables the user to find contacts with a matching profile based on employer, ZIP Code and other information.
- **Customer Referral Value - Button:** Enables the user to view all contacts referred by another contact, plus the amount of business transacted with those contacts.
- **Duplicate Records Report - Side Menu:** Enables the user to view contacts, advisors, agencies or businesses that might be duplicates in SmartOffice.

## Advanced Calendar Functions

For more information about these functions, refer to the [SmartCalendar User Guide](#).

- **Overdue Projects - Side Menu:** The Overdue Projects option in the side menu (under Calendar) displays all of the tracked, Project-type activities that were scheduled for completion before the current date but have not been marked as Done.
- **Unfinished Activities - Side Menu:** The Unfinished Activities option in the side menu (under Calendar) displays all tracked past activities that have not yet been marked as Done or Cancelled.
- **Add Important Dates in Side Menu:** This option enables the Add Important Dates to the Calendar option in the side menu (under Utilities). This feature extracts important dates related to contacts or businesses (e.g., birthday, policy renewal, investment maturity) and creates corresponding activities.
- **Calendar Reports - Side Menu:** The Calendar Reports option in the side menu (under Reports) enables the user to set up and print the activities or task that have been scheduled on the calendar for any day, week or month.
- **Activity Statistics Report - Side Menu:** This option enables the Activity Statistics option in the side menu (under Reports). This feature displays a statistical snapshot of a user's activities. A user can see his or her effectiveness for a particular period of time in terms of percentage of marketing activities that resulted in a sale made, or in terms of a dollar amount for each activity (based on total commissions for sales made in that time period).
- **Search Activity - Side Menu:** This option displays the Search Activities option in the side menu (under Calendar). This feature enables the user to look for activities based on type, priority or status within a specified date range.

## Advanced Advisor Management Features

- **Broker Dealer - Button:** Enables the **Menu > Broker Dealer** option on the advisor Detail content link. This option identifies the broker dealer and the series licenses that a producer holds to do security-based business.
- **Advisor/Contract Hierarchy - Buttons:** Enables the **Menu > Advisor Hierarchy** and **Menu > Contract Hierarchy** options on the Advisor List. The Advisor Hierarchy option opens a dialog box displaying a hierarchical view of an Advisor in relation to any associated advisors. The Contract Hierarchy option opens a dialog box displaying the list of contracts for an advisor and a hierarchical view of those contracts, enabling easy navigation to other contracts within the hierarchy. These dialog boxes remain open while the user navigates to other areas of SmartOffice.
- **Product Marketing - Button:** Enables the **Menu > Product Marketing** option from the advisor Personal content link. Product Marketing enables the user to manually track the percentage of a certain line of business that an advisor would sell. The user can then market specific products to that advisor based on those percentages.
- **Advisor Policy Statistics - Button:** Enables the **Menu > Advisor Policy Statistics** option on the advisor Personal content link. This feature lists the individual and group

policies associated with the advisor, as well as premium and benefit information for each policy.

- **Advisor Reassignment - Button:** Enables the **Menu > Advanced Options > Advisor Reassignment** option on the Advisor List. This feature lists all of the contacts and holdings assigned to an advisor, making it possible to reassign those contacts and holdings to one or more other advisors.
- **Advisor Merge - Button:** Enables the **Menu > Advanced Options > Advisor/Agency Merge** option on the advisor Personal content link and the Advisor List. This option enables the user to transfer information from one Advisor or Agency (the “source”) to another (the “target”) and to resolve any conflicts.
- **SmartView for Advisors - Button:** Displays the **Menu > SmartView for Advisor User Accounts** option on the Advisor List. This feature enables the user to create a special user name and password that the selected advisor can use to view (but not edit) contact, calendar and other information in SmartOffice on the Web, 24 hours a day. For more information, refer to the [SmartCaseManager User Guide](#).
- **Show Production Content Link:** Enables the Production content link for advisor records. This feature calculates an advisor’s production figures for written and inforce business over a specified time period, based on criteria such as carrier, line of business and plan name.
- **Show Commissions Content Link to non-CTM users:** Enables the Commission content link on advisor records even for users who do not have a license for the SmartCommissions commission tracking module.

## REMOVE Functionality

- **Remove Timer Functionality:** Prevents the user from being able to log the amount of time spent on an activity.
- **Remove SmartPad Functionality:** Prevents the user from viewing the SmartPad or adding new SmartPad notes.
- **Disable Alert Button:** Disables the button in the center of the Quick Action Corner. This prevents the user from displaying the Alert Center, which notifies the user about new or modified activities, overdue projects and other events. For more information, refer to the [Alert Center User Guide](#).
- **Remove access to Advisors & Agencies:** Removes the Advisors/Agencies menu item from the side menu (under People & Companies) and disables access to advisor and agency information.
- **Remove Household Functionality:** Removes the Household menu item from the side menu (under People & Companies), as well as the Household content link for contacts. This prevents the user from viewing demographic, policy, investment and other data for a single family in one place.
- **Remove Letters/Documents Content Link:** Removes the Letters/Documents content link throughout SmartOffice. This prevents the user from viewing letters and file attachments associated with a contact.

- **Remove Set Functionality:** Removes the Sets menu item from the side menu (under People & Companies). This prevents the user from grouping contacts into sets.
- **Remove New (Comprehensive) Functionality:** Removes the **Menu > New (Comprehensive)** option from the Contact and Business List/Detail content links, preventing the user from adding extensive additional information while creating a contact or business, such as additional contacts and household members.
- **Remove Change Password Button:** Removes the Change Password option from the side menu (under Setup), preventing the user from changing his or her SmartOffice password.
- **Disable SmartOffice Utilities:** Prevents the user from downloading and installing SmartOffice Utilities and removes that option from the **Setup > Installations** page. This user right is selected by default for SmartView for Advisors users, because there is an alternative downloadable component for these users that enables these users to print or preview lists.

## Licenses

### Packages

- **Base SmartOffice:** This is the standard user package and enables access to the basic contact management features of SmartOffice.
- **Agency Package:** This package enables access to SmartCaseManager, the agency module and the base system.
- **Leads View:** This package enables access to basic features of the SmartLeads module, such as accepting and rejecting leads. For more information, refer to the [SmartLeads User Guide](#).
- **Leads-Coordinator View:** This package enables access to more advanced features of the SmartLeads module, such as assigning leads. For more information, refer to the [SmartLeads User Guide](#).

### SmartPDA

- **SmartPDA:** Enables the user to view SmartOffice data using a Web-enabled mobile device, such as a BlackBerry. For more information, refer to the [SmartPDA User Guide](#).

## SmartLeads/SmartOpportunities

For information about these features, refer to the [SmartLeads User Guide](#) and [SmartOpportunities User Guide](#).

- **Leads Coordinator:** Enables the user to assign, reject and revoke leads, and to run statistic reports for advisors.
- **Leads:** Enables the SmartLeads module for the advisor.
- **Opportunity:** Enables the SmartOpportunities module.
- **Opportunity Setup Administrator:** Enables the Opportunities Setup option in the side menu (under Setup), which enables the user to view, modify, and delete stages, stage actions, and more.

## SmartPolicies

For more information about these features, refer to the [SmartPolicies User Guide](#).

- **Policy Tracking:** Enables access to the SmartPolicies module.
- **Advisor Contract/License Management:** Enables access to the licensing, compliance, contracting and appointment sections of the advisor module, as well as the Setup section in which this information is managed.
- **Pending Case & Policy Setup Administrator:** Enables the user to modify the Master Requirement List, Setup Requirement Follow-up Days, Status Exclusion, Pending Case Workflow and SmartView for Advisor Privacy defaults. This license also enables the Policy/Case Setup option (under Setup in the side menu). The Policy/Case Setup option opens the Master Setup List, which includes the DataXchange Setup menu and Initial Requirement Load for System Office users. DataXchange Setup enables the creation of DataXchange Registration, GA IDs for GA ID Validation and Auto-Update Exceptions. Access to the HO Pending Case menu is enabled with DX Registration information.
- **Show Policy Owner Servicing POS Content Link:** Enables access to the policy owner service requirements content link while viewing a policy.
- **Show Policy Claims Content Link:** Enables access to the claims related to the selected policy.
- **Show Policy Transactions Content Link:** Enables access to the Policy Transactions content link while viewing a policy. This content link lists transactions such as address and beneficiary changes, premium payments and partial and total surrender.
- **Production Dashboard:** Enables the reporting of production values for an agent, firm, product, etc., for a selected period of time.
- **Commission Rate Entry:** Enables the Commissions Setup option under the Setup option in the side menu.
- **Group Benefits (Group Policy):** Enables access to the SmartBenefits module.

## SmartCase

For more information about these features, refer to the [SmartCaseManager User Guide](#).

- **SmartCaseManager:** Enables access to the pending cases module, including the ability to add, modify and delete pending cases.
- **SmartCase Viewer:** Enables the user to search and view pending cases.

## SmartInvestments

For more information about these features, refer to the [SmartInvestments User Guide](#).

- **Investment Tracking:** Enables access to the SmartInvestments module.
- **Asset Allocation:** Enables the Asset Allocation options in the side menu (under Investments) and the Asset Allocation content link in the Investment Accounts tab. The content link tracks the allocation of the client's assets and informs the advisor where the actual allocation deviates from the target allocation by a given variance based on the model allocation.
- **Performance Calculations:** Enables the Investment Performance Validation option under the Investment side menu. This license also shows the Performance Calculations button in the Investment Account List and enables the Account Performance content link in the Investment Account List and Investment Position List.
- **Show Liability Screens:** Enables the Liabilities option under Investments in the side menu. This option also enables the Account Liabilities content link in the Investment Account List and Investment Position List.
- **Show Link Accounts/Positions side menu:** Enables the **Link Account to Contact** and **Link Position to Account** options under Investments in the side menu.
- **Show Investment Transactions:** Enables the Account Transactions content link in the Investment Account List and Investment Position List.
- **Show Investment Position History:** Enables the Account Positions tab in the Investment Account List and the Position History content link in the Investment Position List.
- **Additional Annuity:** Enables the Additional Information content link on variable and fixed annuity positions, which includes fields for entering premium information, remarks and other data.
- **Investment Alert Administrator:** Enables the user to set up and maintain investment alerts.
- **Investment Alert User:** Enables the user to view and interact in a limited way with investment alert results.
- **Investment Alert User (Read-only):** Enables the user only to view investment alert results.
- **Dashboard Administrator:** Enables the user to set up and maintain investment dashboards.

## DataXchange Online Services

- **Process HO Pending Case Status Information:** Enables access to the HO Pending Cases menu item in the side menu (under Insurance), which the user can click to search for pending case updates downloaded from carriers through SmartOffice.
- **Import Log:** Enables access to the Import Log menu item in the side menu (under Utilities), which displays a record of pending case downloads that have occurred.
- **SmartLink for iPipeline:** Enables the SmartLink for iPipeline menu item in the side menu (under Insurance). The user can then process automatic feeds from iPipeline, which provides carrier information such as related standard plans, forms, underwriting guidelines and underwriting requirements. For more information, refer to the [SmartLink for iPipeline User Guide](#).
- **On-Demand HO Pending Case Download:** Enables the user to upload ACORD files into Pending Case Download.

## Mobile Solutions

- **SmartOffice Mobile PC:** Enables access to SmartOffice Mobile PC, a program for laptop users. The program enables users to download information from SmartOffice, view and modify the data while offline, and then upload their changes to SmartOffice the next time they are connected. For more information, refer to the [SmartOffice Mobile PC User Guide](#).
- **SmartOffice Mobile for PDA module:** Enables SmartOffice Mobile for PDA, an application that can be installed on either a Palm or Pocket PC device. This application is used to sync SmartOffice contact information to the PDA.

## SmartWholesaler

For more information about these features, refer to the [SmartWholesaler User Guide](#).

- **Wholesaler Setup Administrator:** Enables the user to access Wholesaler Setup to configure the system with company-specific settings, which identify sales reps, territories and sales channels.
- **Wholesaler:** Enables the user to access the SmartWholesaler module but not to configure the system with company-specific settings, which identify sales reps, territories and sales channels.

## SmartFulfillment

For more information about these features, refer to the [SmartFulfillment User Guide](#).

- **Show Fulfillment Option:** Displays the Fulfillment content link in the Contact List and Business List, enabling the user to create and view and fulfillment requests.
- **Fulfillment Administrator:** Enables the Fulfillment menu items in the side menu (under Sales & Marketing) used to fulfill or decline requests.

## SmartCommissions - Advanced

For more information about these features, refer to the [SmartCommissions User Guide](#).

- **CTM Administrator:** Enables access to all functions of the commission tracking system. This license includes carrier postings of commission checks, validation of what was received, what was expected and all reporting functionality and special utilities that are used to mass modify commission records.
- **CTM House View:** Enables full viewing of all payment levels in the hierarchy chain.
- **CTM Supervisor View:** This option is similar to the CTM Advisor View license, except that it enables access to commission records for the advisor and supervisor levels.
- **CTM Advisor View:** This license restricts how much commission data a user in the office can view over and above the access to specific advisors the user may already have in SmartOffice. SmartCommissions allows for a variety of levels of payment. The hierarchy begins at the advisor and rolls through all supervisors up to the house level. The CTM Advisor View option enables the viewing of commission records at the advisor level only. Supervisor and house transactions are not available for viewing.
- **CTM Processing:** Enables access to all commission processing functions except Mass Projection and Setup. This includes carrier postings of commission checks, expected vs. received reconciliation and all reporting functionality and special utilities used to mass modify commission records.

## SmartCommissions - Base

For more information about these features, refer to the [SmartCommissions User Guide](#).

- **SmartCommissions - Carrier Interface:** Enables access to contract and rate setup and provides the ability to import commission data from insurance carriers for the purpose of reporting on the data only.
- **CTM - Advisor Payment Import:** Enables the user to import any type of additional commission data to be paid to advisors and to integrate that data into a commission check run.

## SmartRecruiting

For more information about these features, refer to the [SmartRecruiting User Guide](#).

- **Recruiter Setup Administrator:** Enables everything that the Recruiter license enables, plus access to the Recruiting Setup menu item (under the Setup menu).
- **Recruiter:** Adds the Candidates option to the side menu (under People & Companies). This enables access to the Candidate/Recruit List and the Recruiting Status Reports.

## Event Management

For more information about these features, refer to the [SmartEvents User Guide](#).

- **Event Management Administrator:** Enables the SmartEvents module, used to schedule seminars and similar events.
- **Event Management User:** Enables the user to track participation in events.

## Integration

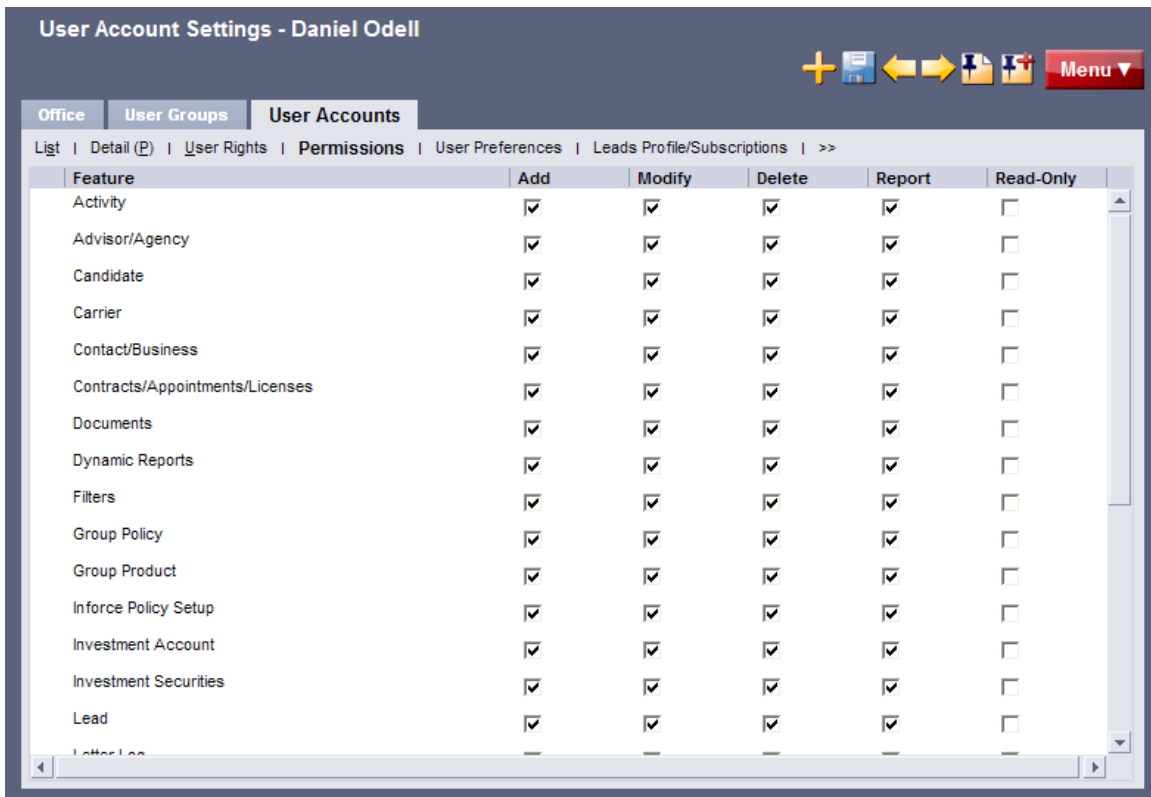
This section lists licenses purchased from Ebix CRM that enable the integration of third-party programs and services with SmartOffice.

## User Accounts - Permissions Content Link

On the Permissions content link in [User Accounts](#), administrators can restrict whether a user can add, modify or delete various types of records and other entities in SmartOffice.

The options available on the Permissions content link differs based upon the selections made on the [User Rights content link](#).

**Note:** Use caution when changing these settings. Improperly configured permissions may prevent the user from properly using SmartOffice.



Feature	Add	Modify	Delete	Report	Read-Only
Activity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Advisor/Agency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Candidate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Carrier	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact/Business	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contracts/Appointments/Licenses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Dynamic Reports	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Filters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Group Policy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Group Product	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Inforce Policy Setup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Investment Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Investment Securities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lead	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Letter Log	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Note:** When the Read-Only option is selected, the Add, Modify and Delete options are automatically cleared. This is because, when an entity is marked as Read-Only, no read or write access is allowed.

## User Accounts - User Preferences Content Link

On the User Preferences content link in [User Accounts](#), an administrator can edit the calendar, correspondence and other preferences for a user account.

The screenshot shows the 'User Preferences' page for user Carl M. Mathews. The page is divided into several sections:

- General Information:** Fields for User Name (Carl), Full Name (Carl M. Mathews), Contact Record for this User (Carl Mathews), E-mail Address (sodemo@ez-data.com), and Default User Group (All Users in Office).
- Password Reminder:** A section for entering a password reminder question and answer.
- Cross Office Record Sharing:** A section with a 'Not a Specialist' option and a note about Office Security.
- Default Settings:** Fields for Default Area Code, Default Country Code, Date Format, Business SmartPad View Settings (1. Business Only), Print all PDFs in Black & White (No), and Default location at Login. It also includes several checkboxes for preferences like 'Do not prompt to send referral thank you letter', 'Do not show Information Card', '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', and 'Display timed activities before untimed activities on SmartPDA'.
- Alert/Notification Settings Outside of SmartOffice:** A section for receiving alerts outside of SmartOffice, with options for E-mail and SMS Text Message, including fields for E-mail Address, Provider (T-Mobile), and Mobile Number.
- My Favorite User List:** A section with a checkbox for 'User Full Name' and an 'Options' button.

For descriptions of all user preferences, refer to the [Getting Started Guide](#).

## User Accounts - Leads Profile/Subscriptions Content Link

The Leads Profile/Subscriptions content link is accessed from [User Accounts](#).

**Note:** The functionality of this content link is still being finalized. This topic will be updated when functionality is complete.

User Level Leads Distribution Profile/Subscription - Daniel Odell

Office | User Groups | **User Accounts** | [Menu](#)

List | Detail (P) | [User Rights](#) | [Permissions](#) | [User Preferences](#) | **Leads Profile/Subscriptions** | Proxy: Whose data this User can see | >>

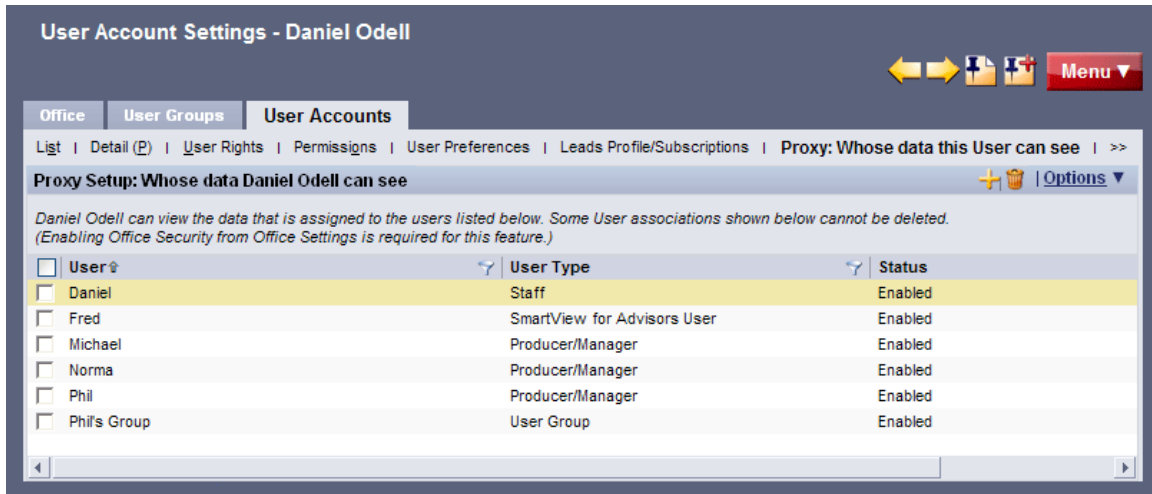
Leads Program Settings		Lead Type   <a href="#">Options</a> ▼		Product   <a href="#">Options</a> ▼	
Maximum Leads Cost	<input type="text"/>	Value	Opt-Out	Value	Opt-Out
Minimum Lead Score	<input type="text"/>				
<input type="checkbox"/> Opt-Out of Leads Program					
Average Time to Accept a Lead					
Average Close Rate					

Demographic Rules   <a href="#">Options</a> ▼		LOB   <a href="#">Options</a> ▼		Customer Type   <a href="#">Options</a> ▼	
<input type="checkbox"/> ZIP Code Like	<input type="text"/>	Value	Opt-Out	Value	Opt-Out
Office Full Name	<input type="text"/>				

Campaign Type   <a href="#">Options</a> ▼		License Type   <a href="#">Options</a> ▼		Miscellaneous Type   <a href="#">Options</a> ▼	
Value	Opt-Out	Value	Opt-Out	Value	Opt-Out

## User Accounts - Proxy: Whose Data This User Can See

The **Proxy: Whose Data This User Can See** content link (accessed from [User Accounts](#)) is a listing of all users the current user proxies for. Use this list to add or remove the users that the current user will proxy for.



**User Account Settings - Daniel Odell**

Office | **User Groups** | **User Accounts**

List | Detail (P) | User Rights | Permissions | User Preferences | Leads Profile/Subscriptions | **Proxy: Whose data this User can see** | >>

**Proxy Setup: Whose data Daniel Odell can see** | Options

*Daniel Odell can view the data that is assigned to the users listed below. Some User associations shown below cannot be deleted. (Enabling Office Security from Office Settings is required for this feature.)*

<input type="checkbox"/> User	User Type	Status
<input checked="" type="checkbox"/> Daniel	Staff	Enabled
<input type="checkbox"/> Fred	SmartView for Advisors User	Enabled
<input type="checkbox"/> Michael	Producer/Manager	Enabled
<input type="checkbox"/> Norma	Producer/Manager	Enabled
<input type="checkbox"/> Phil	Producer/Manager	Enabled
<input type="checkbox"/> Phil's Group	User Group	Enabled

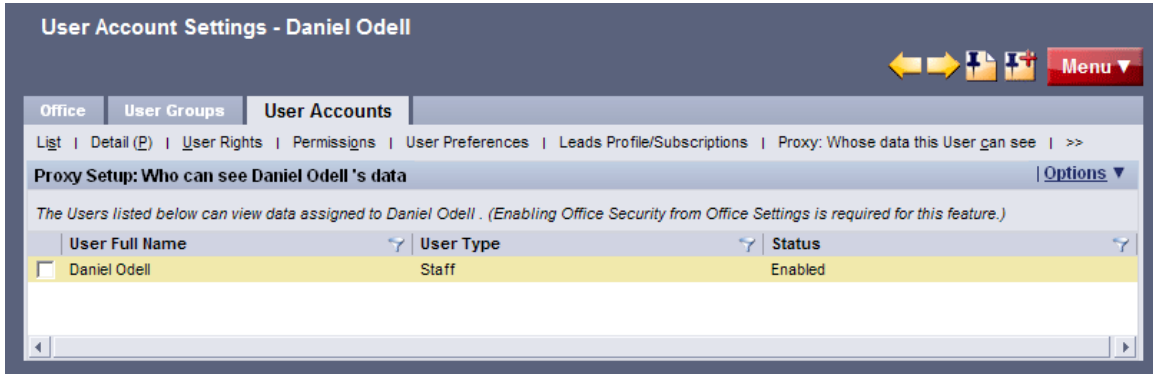
To add a user to the list, select **Options > New 'Available Users/User Groups' record** and then select the users and/or user groups that this user will proxy for.

To delete one or more users, tag the users and then select **Options > Delete 'Available Users/User Groups' record**.

For more information about proxy relationships, refer to the [SmartSecurity User Guide](#).

## User Accounts - Proxy: Who Can See This User's Data

The Proxy: Who Can See This User's Data content link (accessed from [User Accounts](#)) lists all other users that proxy for the user.



**User Account Settings - Daniel Odell**

Office | User Groups | **User Accounts**

List | Detail (P) | User Rights | Permissions | User Preferences | Leads Profile/Subscriptions | Proxy: Whose data this User can see | >>

**Proxy Setup: Who can see Daniel Odell's data** | Options ▾

*The Users listed below can view data assigned to Daniel Odell . (Enabling Office Security from Office Settings is required for this feature.)*

User Full Name	User Type	Status
<input type="checkbox"/> Daniel Odell	Staff	Enabled

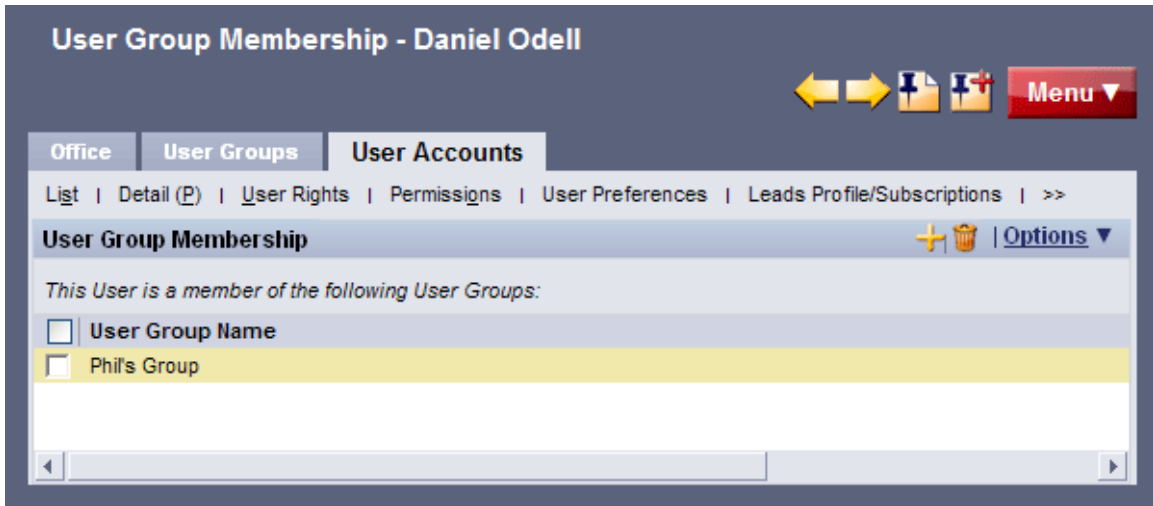
Proxy relationships cannot be changed from here; this content link is for informational purposes only. To make changes, go to either of the following:

- [User Accounts - Proxy: Whose Data This User Can See](#)
- [Office Settings - Department/Team Hierarchy](#)

For more information about proxy relationships, refer to the [SmartSecurity User Guide](#).

## User Accounts - User Groups Content Link

The User Groups content link in [User Accounts](#) lists the user groups that the user belongs to.



The screenshot shows the 'User Group Membership - Daniel Odell' interface. At the top, there are navigation arrows and a 'Menu' button. Below this, there are tabs for 'Office', 'User Groups', and 'User Accounts', with 'User Accounts' being the active tab. A breadcrumb trail includes 'List', 'Detail (P)', 'User Rights', 'Permissions', 'User Preferences', and 'Leads Profile/Subscriptions'. The main section is titled 'User Group Membership' and contains the text 'This User is a member of the following User Groups:'. Below this, there is a table with one row: 'Phil's Group'. The table has a checkbox in the first column and the group name in the second column. The 'Options' menu is visible in the top right corner of the table area.

<input type="checkbox"/>	User Group Name
<input type="checkbox"/>	Phil's Group

For information, see [User Groups](#).

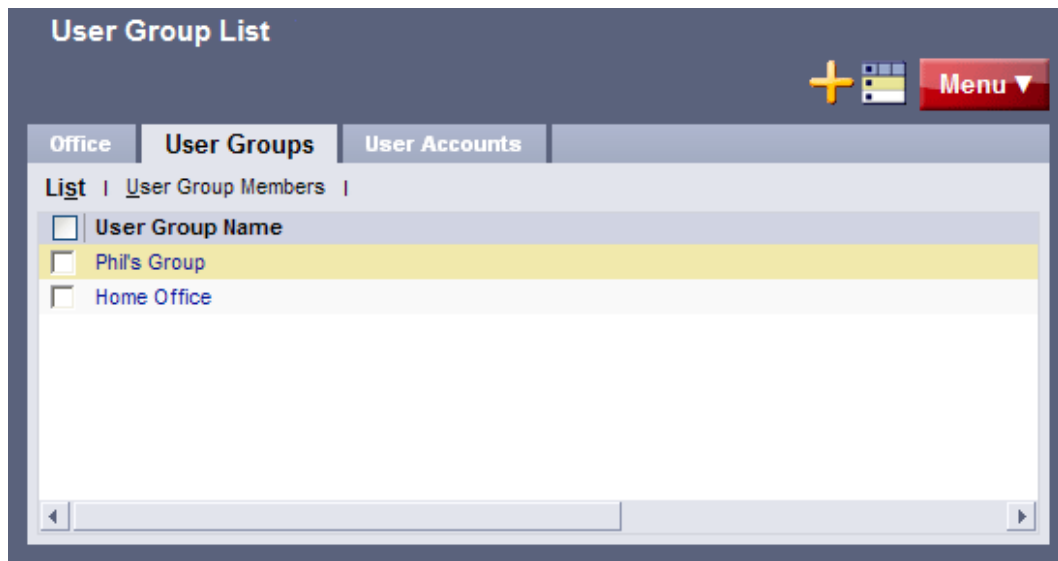
# User Groups

A user group simplifies certain SmartOffice tasks that normally involve selecting users individually.

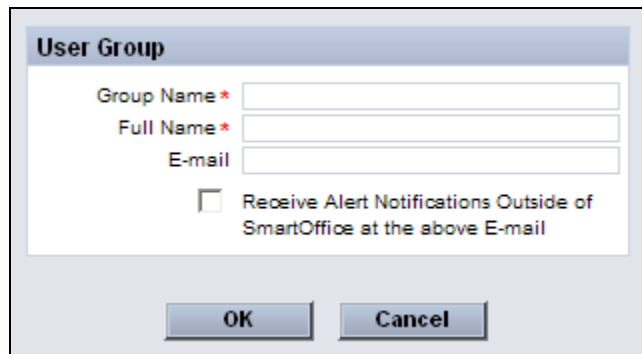
- **Activity Participation:** Instead of adding individual users as participants to a call, meeting or other activity, the activity creator can add a user group. This quickly adds all of the group's members as participants. Refer to the [SmartCalendar User Guide](#) for more information.
- **User Assignment:** When office security is enabled, user groups can be assigned to records. Refer to the [SmartSecurity User Guide](#) for more information.

## Creating a User Group

1. Click **Setup** from the side menu and then select **User Groups** from the expanded list of options.
2. The User Group List displays, listing all existing user groups.



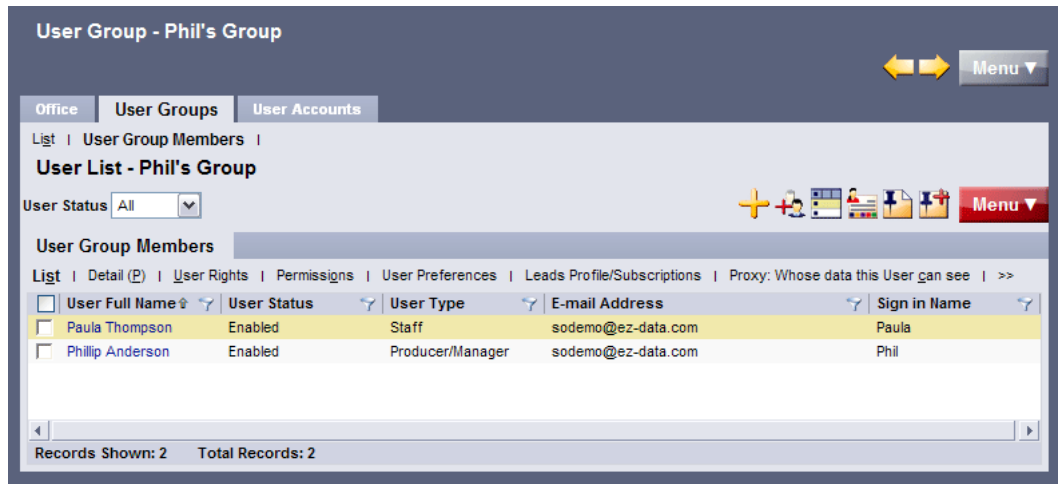
3. Click the **New** button to open the User Group dialog box.



4. (Optional) If the members of the group also belong to an e-mail list within the organization, enter that address in the **E-mail** field. When that address is specified, selecting the **Receive Alert Notifications Outside of SmartOffice at the above E-mail** option notifies users by e-mail if the group is added to an activity and if those users have chosen to receive alerts by e-mail. For information, see Activity Alerts.
5. Enter the group name and a full name (i.e., a more detailed description of the group).
6. Click the **OK** button.

## Adding a User to a User Group

1. Tag the group in the User Group List.
2. Click the **User Group Members** content link to display a list of users belonging to the group.



3. Click the **New** button.
4. When the list of users displays, tag the users to be added to the group.
5. Click the **OK** button.

# SmartOffice Training

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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](mailto:marlon.urias@ebix.com).

## Technical Support Information

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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.

<p><b>E-mail:</b> <a href="mailto:SmartOfficesupport@Ebix.com">SmartOfficesupport@Ebix.com</a></p>	<ul style="list-style-type: none"><li>• Great option for non-critical issues</li><li>• Be sure to include the registered user's name in the body of the e-mail</li><li>• Please provide a complete description of the problem</li><li>• 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.</li></ul>
<p><b>Telephone:</b> (626) 585-3515</p>	<ul style="list-style-type: none"><li>• Best for urgent or complicated issues</li><li>• Support center hours of operation:<ul style="list-style-type: none"><li>○ 5:00 AM to 5:00 PM PT Monday – Thursday</li><li>○ 5:00 AM to 1:30 PM PT Friday</li><li>○ The department is closed on most major holidays.</li></ul></li></ul>

## User Accounts - User List Worksheet

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Print the following worksheet and use it to collect information about employees in preparation for [creating users in SmartOffice](#). If more space is required, print multiple copies of the worksheet.

User Name	Full Name	E-mail Address	User Type	Template	Department and/or Group
					Dept: Group:
					Dept: Group:
					Dept: Group:
					Dept: Group:
					Dept: Group:
					Dept: Group:
					Dept: Group:
					Dept: Group:
					Dept: Group: