

SmartOffice® v7 System Requirements

To ensure acceptable performance of SmartOffice, verify that the system requirements listed in this document are met or exceeded. These requirements are based on a combination of software design and field performance tests. Computers configured to exceed these minimum requirements may further enhance the overall performance of SmartOffice.

Operating Systems

SmartOffice v7 requires one of the following versions of Microsoft® Windows® with all updates installed ([download the latest Windows updates](#)):

- **Windows XP (with Service Pack 3)**
 - 32-bit versions only; 64-bit versions are not supported.
 - Windows XP Media Center Edition is not supported.
- **Windows Vista (with Service Pack 1)**
 - 32-bit versions only; 64-bit versions are not supported.
- **Windows 7**
 - 32- and 64-bit versions are supported.

Notes regarding Windows support

SmartOffice Sync for Outlook/Lotus Notes, SmartOffice Mobile PC and SmartLink for Labels are not currently compatible with 64-bit Windows 7.

Windows Terminal Services/Citrix environments are not supported.

Mac environments, including Windows running on a Mac (e.g., Parallels, virtualization, dual boot, etc.), are not supported.

Memory (RAM)

- 1 GB for Windows XP
- 2 GB for Windows Vista
- 4 GB for Windows 7

Web Browsers

SmartOffice v7 supports the following versions of Microsoft® Internet Explorer® (32-bit only; 64-bit versions are not supported). All updates must be installed ([download the latest Internet Explorer updates](#)).

Note regarding Internet Explorer support: The 64-bit version of Internet Explorer is not currently supported on any version of SmartOffice because of configuration issues with that version. SmartOffice's memory requirements are not high enough to make use of the 64-bit version. SmartOffice requires the 32-bit version of Internet Explorer to run properly.

- **Internet Explorer 7 or 8 (recommended)**

- Internet Explorer 7 or 8 is required for the following SmartLink integrations:
 - SmartLink for Laser App
 - SmartLink for Financial Profiles+
 - SmartLink for Quik! Forms
 - SmartLink for Labels (DYMO v7.8; v8.2 is not supported at this time)
 - SmartLink for Jefferson Pilot
 - SmartLink for Licensing and Appointments
 - SmartLink for Mass Mutual PARR
 - SmartLink for DAZL
 - SmartLink for DST
 - SmartLink for Lincoln Investment Planning
 - SmartLink for LPL
 - SmartLink for National Financial/Fidelity
 - SmartLink for Pershing
 - SmartLink for Raymond James
 - SmartLink for Resources Trust IMS
 - SmartLink for Rydex
 - SmartLink for Stern Agee
 - SmartLink for TD Ameritrade
 - SmartLink for The Vanguard Group
 - SmartLink for Walnut Street Securities

- **Internet Explorer 6**

- Internet Explorer 6 is compatible with Microsoft® Word®, Outlook® and Excel® integrations, as well as PDF export.

Note: Because of minor graphical issues that occur when using Internet Explorer 6 with SmartOffice v7, Ebix CRM does not recommend Internet Explorer 6.

Office Suites

SmartOffice supports integration with Microsoft® Office® and Lotus® Notes®. Refer to the following sections for details about specific versions supported.

Microsoft Office

Note: Microsoft Office 2010 is currently not supported. Ebix CRM plans to include support for Office 2010 in an upcoming release of SmartOffice.

SmartOffice v7 integrates with the following versions of Microsoft Office programs (32-bit only; 64-bit versions are not supported). All updates must be installed ([download the latest Office updates](#)).

- Word 2007 or 2003 (required for composing letters in Word)
- Excel 2007 or 2003 (required for exporting and printing the Excel files produced by SmartOffice)
- Outlook 2007 or 2003 (required for Outlook e-mail posting and calendar/contact synchronization)

Note: Versions of Office prior to Office 2003 are not supported.

SmartOffice v7 has not been tested or certified for use with the following Office editions:

- Microsoft Office Home and Student 2007
- Microsoft Office Student and Teacher Edition 2003

Lotus Notes

SmartOffice v7 integrates with the following versions of Lotus Notes:

- Lotus Notes 6.5.x, 7.0.2 or 8 (required for Lotus Notes e-mail posting)

Note: SmartOffice v7 requires additional Lotus Notes Template changes for e-mail posting to work correctly. Please review the [Lotus Notes Template Setup Guide](#) and consult your Lotus Notes administrator.

E-mail Programs

Most modern e-mail programs are capable of properly displaying e-mail messages sent from SmartOffice.

Known issues exist with old e-mail programs that are no longer actively developed or that are based on outdated technology, such as Microsoft Outlook Express. Messages sent from SmartOffice contain formatting that these programs cannot display.

Ebix CRM recommends that recipients of e-mail messages from SmartOffice use modern e-mail software for optimal results.

Other Software

Adobe® Reader® and Flash® Player

- Adobe Reader 6, 7, 8 or 9 is required for viewing and printing PDF files produced by SmartOffice. Adobe Reader 7, 8 or 9 is recommended ([download Adobe Reader](#)).
- Adobe Flash Player is required for viewing home page charts ([download Adobe Flash Player](#)).

Contact Information

For assistance, contact Ebix CRM Technical Support at (626) 585-3515 or SmartOfficesupport@Ebix.com.