



Implementation Guide

Version 5



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About This Guide

Congratulations on your purchase of SmartOffice® Online – the most powerful Customer Relationship Management solution in the insurance and financial services industry! As an administrator of SmartOffice Online, your job is to ensure that the SmartOffice Online implementation goes smoothly and that your office is up and running as quickly as possible. Of course, that's our goal, too!

The information contained in this guide should address many of the questions you have as you begin the implementation and configuration process. Please read the entire guide and contact our office for questions or clarification on the information presented.

Implementation Overview

Step 1: Ensuring Hardware and Software Requirements are Met *(page 3)*

Ensure that all computers that will access SmartOffice Online meet or exceed the hardware and software minimum requirements.

Step 2: Logging in to your Office *(page 4)*

Login to your office.

Step 3: Configuring your Office *(page 8)*

Complete office configuration, specify default settings.

Step 4: Understanding How Security Affects Data Entitlement *(page 22)*

While E-Z Data is creating your office and admin user, thoroughly read "Understanding How Security Affects Data Entitlement" as preparation to create new users in your SmartOffice Online office.

Step 5: Understanding How User Roles Affect Feature Access *(page 25)*

Determine users (other than the Admin User) that must be created in SmartOffice Online. Thoroughly read "Understanding How User Roles Affect Feature Access."

Step 6: Creating Users *(page 32)*

Fill out the User List Worksheet included at the end of this document. After your office is created, log on to SmartOffice Online as the Admin user and create new users.

Step 7: Establishing Department/Team Hierarchy or Proxies *(page 36)*

Create Department Hierarchy and create proxies (if needed).

Step 8: Creating User Groups *(page 41)*

Create User Groups (if needed).

Step 9: Configuring and Using SmartMail for Outlook *(page 43)*

Configure Outlook e-mail interface.



Step 10: Training Options *(page 49)*

Learn how to reap the rewards of using a tool as robust and broad in scope as SmartOffice Online by taking advantage of one or more of our training options.

Step 11: Getting Technical Support Assistance *(page 52)*

Now, let's get started!



Step 1: Ensuring Hardware and Software Requirements are Met

To ensure acceptable performance of SmartOffice Online whether you're in the office or on the road, the following hardware and software requirements must be met or exceeded: These requirements are based on a combination of software design and field performance tests. Computers configured to exceed these minimum requirements may further enhance the overall performance of SmartOffice Online.

Hardware Requirements

- Pentium III 600Mhz (or equivalent) processor
- 128MB RAM (256MB preferred)
- 56Kbps dial-up connection (cable modem, DSL or other broadband connection preferred)

Software Requirements

- Microsoft Internet Explorer version 6.0
- Windows 2000 or XP
- Microsoft Word 2000 or 2002 required for Word interface
(Microsoft Word 97 is compatible at this time; however, no further development/testing is being conducted on this version--as is.)
- Microsoft Outlook 2003 required for Outlook interface
- Adobe Reader[®] version 6 (needed for viewing and printing the PDF files produced by SmartOffice Online). Click here for a free download:
<http://www.adobe.com/products/acrobat/readmain.html>.

Step 2: Logging in to your Office

1. When the SmartOffice Online Administrator creates your account, an e-mail containing the login URL, Office Name, User Name, and Password will be sent to you automatically. Click on the link contained in the e-mail to access SmartOffice Online.
2. From the Login screen, enter your **Office Name**, **User Name**, and **Password**.

Note: Click “Remember Me” to have your Office Name and User Name filled in automatically on future logins. For security reasons, you will still need to enter your password.



Figure 1: SmartOffice Login Screen

3. Click **Login**.
4. When prompted, select your time zone and click **OK**.

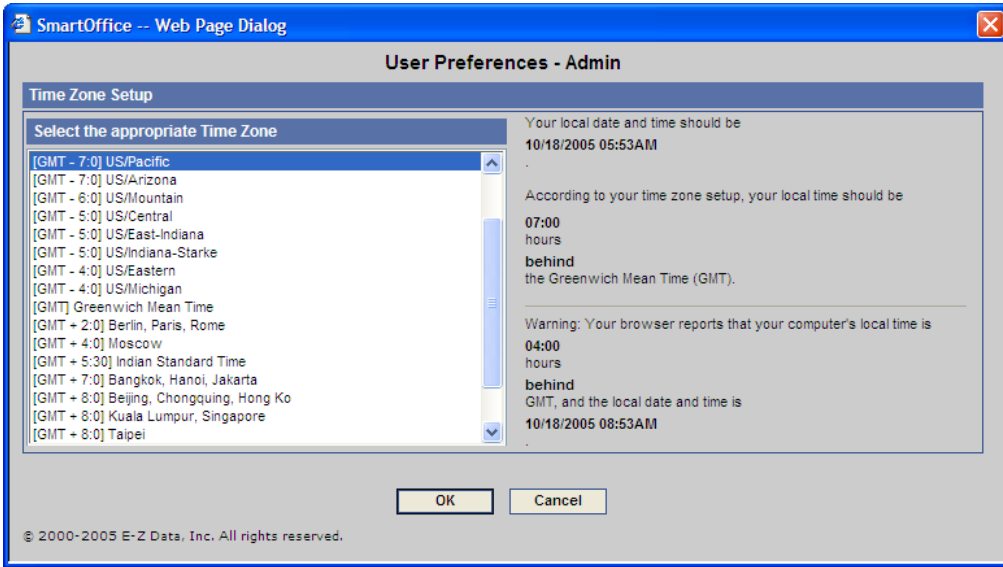


Figure 2: Change Time Zone Screen

- The SmartOffice Home page will display as show below.



Figure 3: SmartOffice Home Page

Note: The options displayed on the side menu vary according to your security level and module assignments. Your options may appear substantially different than those displayed on the screen below.

- The password you used to login should be changed immediately. To change the password, click **User Setup** then **Change Password** from the side menu.

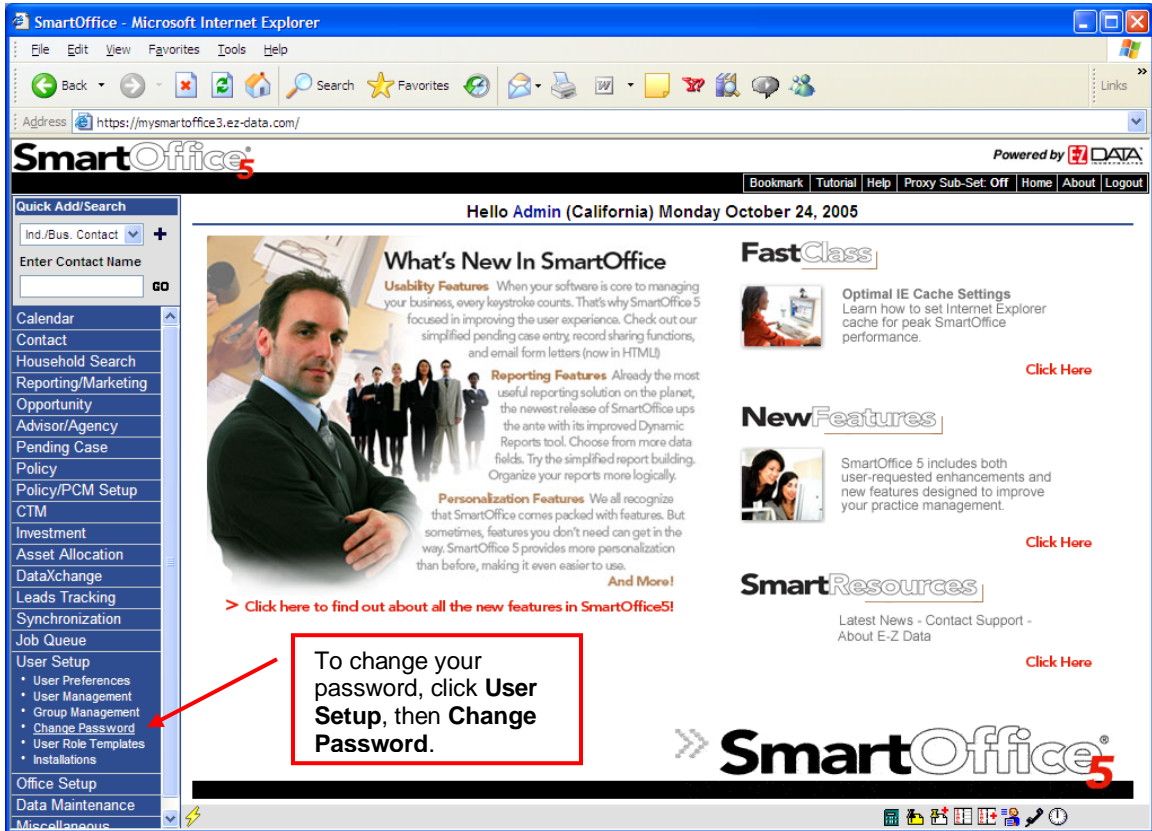


Figure 4: Change Password Option

- The **Change Password** screen displays prompting you to enter a permanent password.



Figure 5: Change Password screen

8. In the “Current Password” field, enter your current password (the one supplied by E-Z Data) then press Tab.
9. Enter your new password and press Tab. Retype your new password and click **Change**. You will return to the SmartOffice Online Home page.

Step 3: Configuring your Office

SmartOffice can be easily customized to meet the unique requirements of your business. This section will walk you through specifying default office settings as well as default user preferences for new users added to your office. At a later time individual users may choose to deviate from the default user preferences entered here.

Note: Only a user with a Users/Licenses Administrator or Access Security Information role can change office information. By default, the admin user created by E-Z Data for your office has these roles.

To specify your default office settings, select **Office Setup** from the side menu then click **Office Settings** to open the Office Administration screen.

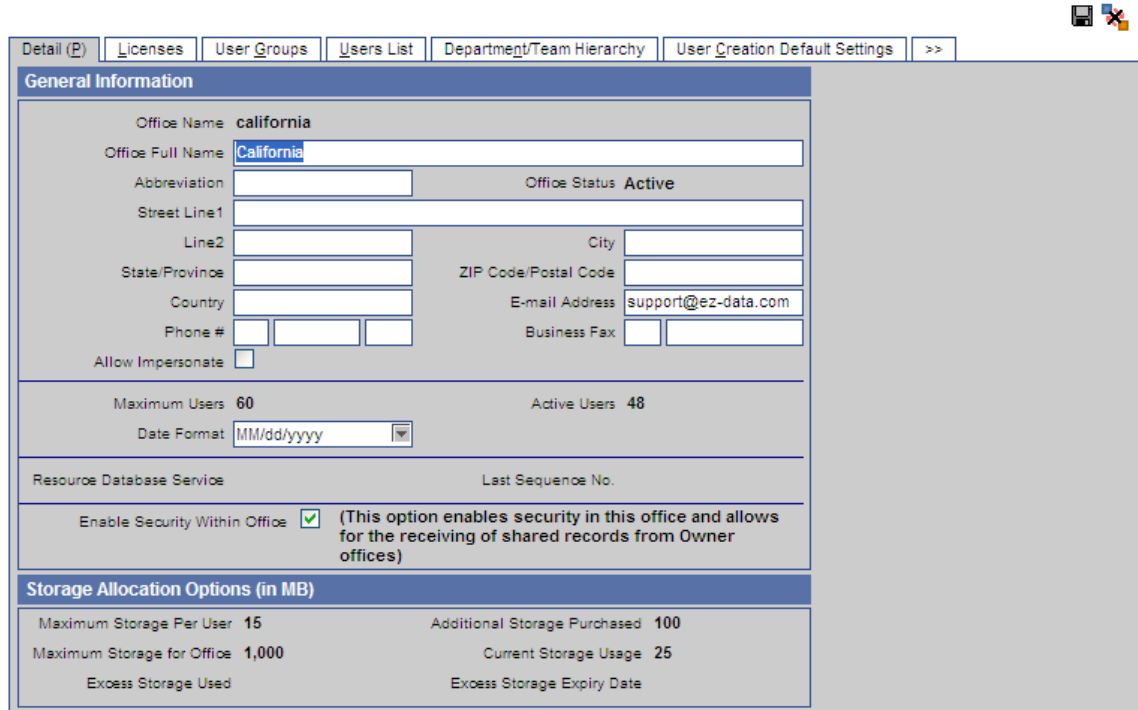


Figure 6: SmartOffice Home Page

Detail Tab

The **Detail** tab contains general information about your office. To modify the information, click the **Modify** icon.

Office Administration - California Office



Storage Allocation Options (in MB)	
Maximum Storage Per User	15
Additional Storage Purchased	100
Maximum Storage for Office	1,000
Current Storage Usage	25
Excess Storage Used	
Excess Storage Expiry Date	

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Figure 7: Office Detail Tab

General Information

The General Information section contains the office name, address, and e-mail address of the admin user in the office. You can change other information in the office Detail tab as necessary.

Allow Impersonate

This option is applicable only to Enterprise View users. Leave this option unchecked, to deny parent offices access to your Dynamic reports, Filter, Vendor, Security Master, and Product information.

Maximum Users/Active Users

These fields are not editable as they are controlled by the number of licenses assigned and in use by your office.

Date Format

Enter the preferred date format for your office.

Enable Security Within Office

Important: If certain people in your office should only view specific contact information, then check the **Enable Security Within Office** checkbox. If all people in the office should see all contact data equally, without any restrictions, then do NOT check the **Enable Security Within Office** checkbox. If this box remains unchecked, finish this section and skip to *Step 5: Understanding How User Roles Affect Feature Access* on page 25.

Resource Database Service/Last Sequence No.

The Resource Database Service field indicates whether this office will receive DataXchange – Carrier Update Pack downloads and if so, the last file number that was downloaded.

Storage Allocation Options

This section shows the office’s storage capacity details.

Licenses Tab

Click on the **Licenses** tab to display the number of licenses assigned to your office. While we cover assigning individual licenses a little later in this guide, it is important to note that once a license is assigned to a user, it is unavailable for use by another user (e.g., licenses are not distributed on a “first-come, first served basis”). A user keeps their license until their login is disabled or given to another user by the Office Administrator.

Note: *The information on this tab can only be changed by an E-Z Data representative.*

Office Administration - California Office

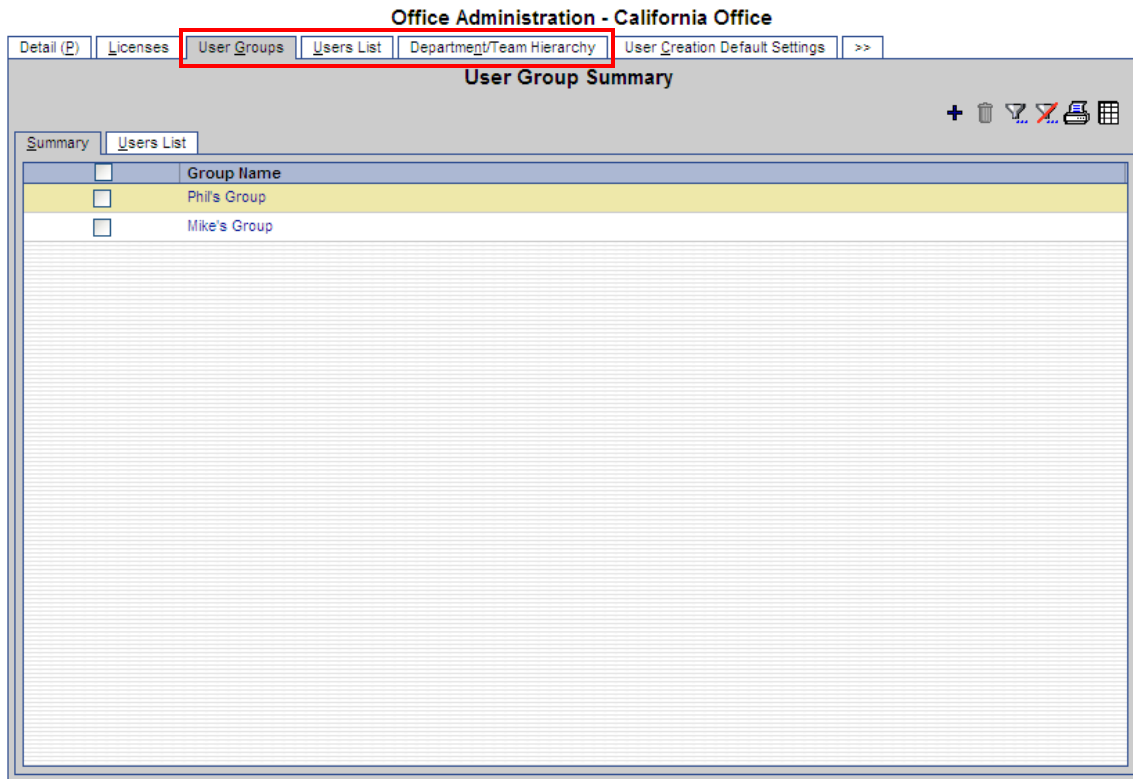
Detail (P) | Licenses | User Groups | Users List | Department/Team Hierarchy | User Creation Default Settings | >>

License Type	Maximum Licenses	Licenses in Use
Agency Manager	25	20
Call Center Module	20	2
DataXchange - Appointment-License	1	0
DataXchange - Investment	1	0
DataXchange - Leads Import	1	0
DataXchange - Leads Revocation	1	0
DataXchange - Office-User	1	0
DataXchange - Policy	1	0
Electronic One Card System (eOCS) Module	20	1
Financial Profiles Interface Module	20	1
Group Benefit Module	20	20
Individual Policy Tracking Module	50	35
Integration	1	0
Investment Tracking Module	26	25
Lead/Campaign Tracking & Management	20	14
LeadsView	0	0
Lotus Notes Integration Module	1	0
Named User	60	50
Opportunity Module	30	21
Outlook Integration Module	1	22
Pending Case Management Module	30	30
Recruitment Tracking Module	20	14

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Figure 8: Office Licenses Tab

User Groups, Users List, and Department/Team Hierarchy Tabs



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Figure 9: User Groups, Users List, and Department/Team Hierarchy Tabs

User Groups Tab

A **User Group** is a collection of users that functions like a single user for purposes of assigning contact records and creating activities (e.g., users in a particular department, job function, physical area, etc.). The **User Groups** tab allows you to create groups and add and remove users from each group. Creating and managing user groups will be covered in *Step 8: Creating User Groups* on page 41.

Users List Tab

The **Users List** tab allows you to view all users in your office, add a new user, modify existing user information, and establish proxies (enable one user to see another user's contacts and activities). Before creating new users, you should read the next two sections: *Step 4: Understanding How Security Affects Data Entitlement* on page 22 and *Step 5: Understanding How User Roles Affect Feature Access* on page 25.

Department/Team Hierarchy Tab

The **Department Hierarchy** feature allows you to create "departments" within your organization for the purpose of providing data access to the members of those departments. Creating Department/Team Hierarchies and Proxies is covered in *Step 7: Establishing Department/Team Hierarchy or Proxies* on page 36.

User Creation Default Settings

Options selected in the **User Creation Default Settings** tab will become default options for each new user created in SmartOffice Online. Keep in mind that these entries are simply default preferences and they may be changed according to each user's preferences.

User Preferences Tab

Default User Creation Settings - California Office

Detail (P) | Licenses | User Groups | Users List | Department/Team Hierarchy | User Creation Default Settings | >>

Default User Preferences

User Preferences (E) | Activity/E-mail Options | Policy/Investment | Letter Printing Options | Time Zone

Default Options

Default Area Code	<input type="text"/>
Default Country Code	<input type="text"/>
Default Word Processor	RTF
Default Enterprise View Mode	Enterprise
Date Format	
Business SmartPad View Option	Business Only
Print PDF in Black & White mode	No
Landing Zone	Home Page

Record Sharing Option

Not a Specialist

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

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Figure 10: User Creation Default Settings – User Preferences Tab

Default Options

The **Default Options** section contains miscellaneous user preference items.

Default Area Code and Default Country Code

The values entered in these fields will be automatically added to phone numbers as new records are added to SmartOffice Online. Enter a 1 in the Default Country Code field for the United States.

Default Word Processor

Accept the default of RTF in the Default Word Processor field.

Default Enterprise View Mode

If you have enabled Enterprise View, specify whether the default view should include records for all the offices in your hierarchy or only those records in the current office.

Date Format

If you want to use a date format that is different than the format set for the office, use the drop down arrow to select the desired date format.

Business SmartPad View Option

When viewing the SmartPad for a Business record, you may choose to display SmartPad entries for the Business record only, for the Business record and its associated Key Relations (e.g., partners in the business, attorneys, CPAs, or other people who are associated with this business), for the Business record and the linked Primary Contact, or for the Key Relations of the business only.

Print PDF in Black & White mode

Specify whether you would like to print SmartOffice Online-generated PDF files in black & white or in color.

Landing Zone

Select the page that you would like displayed upon your login to SmartOffice Online.

Record Sharing Option

Record Sharing is applicable only for offices that have enabled Enterprise View. If you would like to allow users in another office to view specific records from within your office, you may do so using the Record Sharing Option.

Activity/E-mail Options Tab

The Activity/E-mail Options tab allows you to specify default settings for the SmartOffice Online calendar and SmartMail feature.

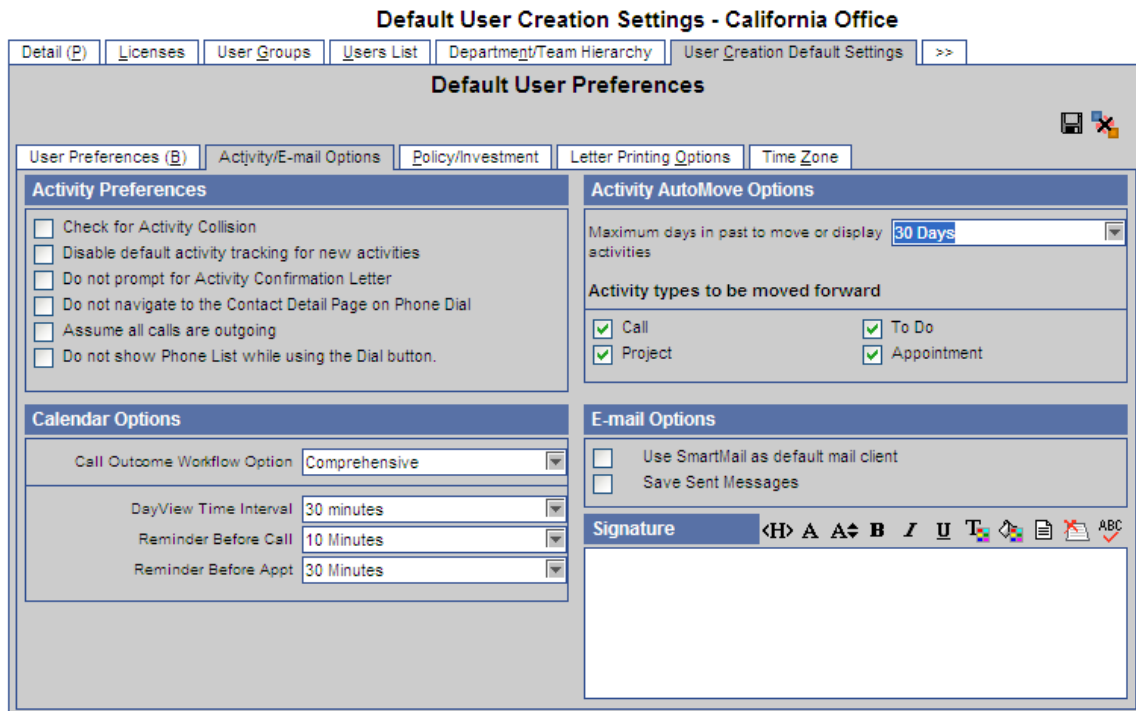


Figure 11: User Creation Default Settings - Activity/E-mail Options

Activity Preferences

Check for Activity Collision

If you would like to be alerted when scheduling a timed activity that conflicts with a previously scheduled timed activity, select the Check for Activity Collision option.



Disable default activity tracking for new activities

When you mark an activity as finished in SmartOffice Online, you will be prompted to note the outcome of the activity (e.g., contact not made, call rescheduled, sale made, etc.). This feature is called Activity Tracking and is controlled by the “Tracked” field in the Activity Detail screen.

If you would like to have your activities tracked by default (indicated by a check mark in the “Tracked” field when adding an activity), leave this box *unchecked*.

Do not prompt for Activity Confirmation Letter

To have SmartOffice Online automatically prompt you to print an activity confirmation letter each time you create a timed activity, leave this box *unchecked*.

Do not navigate to the Contact Detail Page on Phone Dial

SmartOffice Online has an auto-dialer feature that can automatically dial a contact’s phone number (requires modem that interfaces with your telephone) or simply track outgoing and incoming calls if you do not use a modem.

If you would like to display the Contact Detail screen (instead of the calendar or other screen from which you use the auto-dialer) when using the SmartOffice Online auto-dialer, leave this box *unchecked*.

Assume all calls are outgoing

If you only track outgoing calls, check this box. This saves you a step when using the auto-dialer, because you will not be prompted to specify whether a call is outgoing or incoming.

Do not show Phone List while using the Dial button

If you do not have a modem hooked up or otherwise cannot place a call using the auto-dialer, but you would still like to time and track the call, check this box.

Calendar Options

The Calendar options section allows you to specify default values for the Calendar.

Call Outcome Workflow Option

Based upon your selection in this field, when a tracked activity is marked as “Done” in the calendar, you will be presented with either a Simplified or Comprehensive Activity Outcome Wizard (both are shown below).

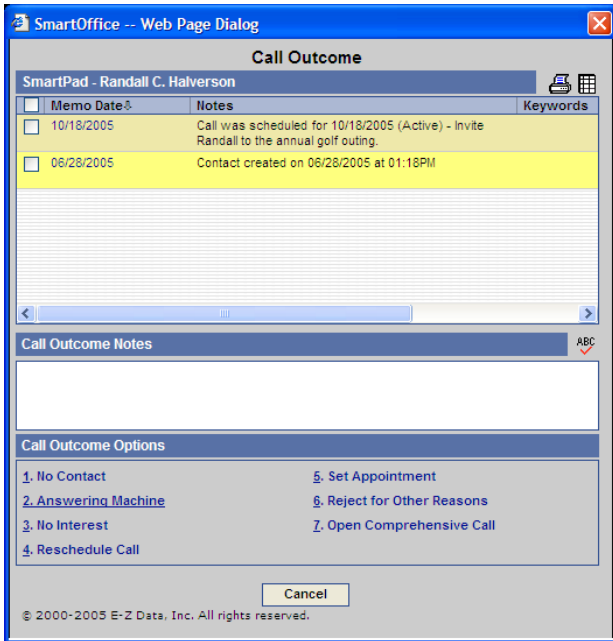


Figure 12: Simplified Call Outcome Wizard

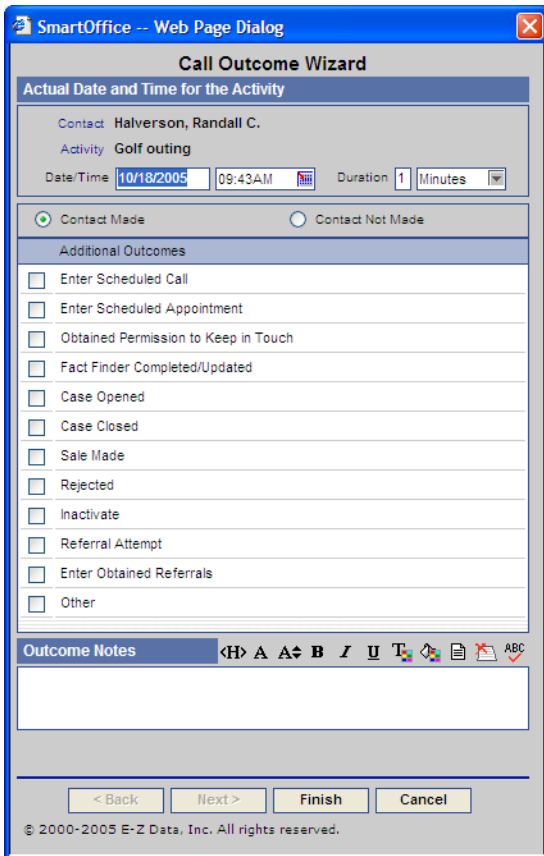


Figure 13: Comprehensive Call Outcome Wizard



DayView Time Interval

The times on the SmartOffice Online calendar (while in DayView) may be shown in 10, 15, 30, or 60-minute intervals.

Reminder Before Call/Reminder before Appointment

SmartOffice Online will display a reminder before timed calls or appointments. Select the amount of time prior to the activity that you would like to be notified.

Activity Automove Options

SmartOffice Online will move forward unfinished past activities (without an associated time) to the current day's calendar based upon the entries in this section.

Maximum days in the past to move or display activities

Specify how many days in the past you would like SmartOffice Online to look for unfinished activities. As long as you log in once during the specified interval, unfinished activities meeting the criteria defined below will move forward indefinitely or until completed. Enter a number that covers times when you are on vacation. We recommend at least 30 days.

Activity types to be moved forward

This is where you can specify the activity types to be moved forward. Please note that only activities without an associated time will be moved forward. For example: If you select "Appointment" in this section only appointments without a specified time will be moved forward.

E-mail Options

The SmartMail options are applicable only for those users who will not be using Outlook as their default E-mail program and who have the SmartMail user role assigned. (User Roles are explained in detail in *Step 5: Understanding How User Roles Affect Feature Access* on page 25.)

Use SmartMail as default mail client

If you are using a POP3 e-mail client, you can send and receive messages via SmartOffice Online using the SmartMail feature. [Click here](#) to make SmartMail your default mail client.

Save Sent messages

[Click here](#) to have SmartOffice Online save a copy of each message sent using SmartMail.

Signature

Enter the user's signature line as it should appear on sent e-mail messages.

Policy/Investment Tab



Default User Creation Settings - California Office

Detail (P) | Licenses | User Groups | Users List | Department/Team Hierarchy | User Creation Default Settings >>

Default User Preferences



User Preferences (E) | Activity/E-mail Options | **Policy/Investment** | Letter Printing Options | Time Zone

You can control 'individual policy' types displayed by SmartOffice by selecting them from the list below.

Show Policy Types  



- Life
- DI
- Annuity
- LTC
- Medical
- Homeowner
- Auto
- Umbrella
- Other

You can control 'group policy' types displayed by SmartOffice by selecting them from the list below.

Show Group Policy Types  

- Group Medical
- Group Dental
- Group Vision
- Group LTC
- LTD
- STD
- Retirement
- Group Life
- A D & D
- Travel
- Section 125

You can control investment types displayed by SmartOffice by selecting them from the list below.

Show Investment Types  

- Mutual Funds
- Stocks
- Bonds
- Cash and Equivalents
- Fixed Annuities
- Variable Annuities
- Unit Investment Trusts
- Direct Participation Programs
- Miscellaneous
- Bank Account
- Personal Property
- Notes Receivable
- Real Estate

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Figure 14: User Creation Default Settings - Policy/Investment

Place a check mark next to each policy, group policy, and investment type you would like the majority of your users to be able to access.

Note: *Policy, Group Policy, and Investment types are only visible for those users given the corresponding license (covered later).*

Letter Printing Options Tab

Office Letter Printing Options Tab

Options selected in **Letter Printing Options** tab will become default letter printing options for each new user created in SmartOffice Online. Keep in mind that these entries are simply default preferences for the office. Other printing options may be selected any time a letter is printed or a user may choose to enter their own printing preferences.

Default User Creation Settings - California Office

Detail (P) | Licenses | User Groups | Users List | Department/Team Hierarchy | User Creation Default Settings | >>

Default User Preferences

User Preferences (E) | Activity/E-mail Options | Policy/Investment | Letter Printing Options | Time Zone

Select the appropriate options as a default 'Letter Printing Option' for the current User. In case of an automatic Workflow, these options will be used to print letters. These options can be overridden at run-time.

<p>Address Options</p> <p><input checked="" type="radio"/> Preferred Address</p> <p><input type="radio"/> Residence Address</p> <p><input type="radio"/> Business Address</p>	<p>Default Envelope, Header/Footer Options</p> <p>Envelope <input type="checkbox"/></p> <p>Header <input type="checkbox"/></p> <p>Footer <input type="checkbox"/></p> <p>Template <input type="checkbox"/></p>
<p>Letters/Documents Tab Options</p> <p><input type="radio"/> Display Letters and Documents in single spreadsheet</p> <p><input checked="" type="radio"/> Display Letters and Documents in separate spreadsheets</p>	<p><input checked="" type="checkbox"/> Print header on first page only.</p> <p><input checked="" type="checkbox"/> Print footer on first page only.</p>
<p>Letter Output Media</p> <p><input checked="" type="radio"/> Contact's Preferred Method</p> <p><input type="radio"/> Print Letter</p> <p><input type="radio"/> Send as e-mail</p> <p><input type="radio"/> Send as Fax</p> <p><input checked="" type="radio"/> Print on Local Printer</p> <p><input type="radio"/> Print on Printer Queue</p>	<p>Letter Printing Options</p> <p><input checked="" type="checkbox"/> Print One Letter per Household</p> <p><input checked="" type="checkbox"/> Apply Contact's Mail Privacy</p> <p><input checked="" type="checkbox"/> Preview before printing</p> <p><input checked="" type="checkbox"/> Post to Letter Log/SmartPad</p> <p><input type="checkbox"/> Create Follow-up Activity</p> <p><input type="checkbox"/> E-mail Word Document as Text</p>

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Figure 15: User Creation Default Settings - Letter Printing Options

Address Options

You may specify a preferred mailing address for each contact entered in your office (e.g., Residence, Business, Other). If you would normally like to send correspondence to the address listed as the contact's preferred address, click **Preferred Address**. If you would like the address option to default to the contact's Residence or Business Address, check the appropriate box.

Letters/Documents Tab Options

The Letters and Documents tab on the Contact record screen can list letters and documents in one list or it can show the letters and documents in separate lists. Check the appropriate box.

Letter Output Media

You may enter a preferred method of communication for every contact in your office (i.e., postal mail, e-mail, or fax). If you would normally like to send correspondence via the contact's preferred method of communication as indicated in their Contact record, select **Contact's Preferred**



Method. If you would like the letter output media to default to letter, e-mail, or fax, check the appropriate box.

If users are responsible for printing their own documents, check **Print on Local Printer**. If you have administrative staff that is responsible for printing the documents for most of the users in SmartOffice Online, check **Print on Printer Queue**. Print jobs will be sent to the job queue of the responsible print queue user. This feature allows remote employees to send their print jobs to the main office for printing and mailing purposes.

Default Envelope, Header/Footer Options

If desired, specify an envelope, document header/footer, and letter template as default settings for users creating correspondence. These options enable you to maintain a consistent look and feel for all contact correspondence. If you use pre-printed stationery, this option may not be applicable.

Click on the appropriate link to select from created documents or to add a document on the fly.

Note: *Envelopes, headers, footers, and letter templates are accessible from the side menu by clicking Office Setup then Form Letters.*

If you would like to print the header and/or footer on the first page only, click the appropriate box.

Letter Printing Options

Use the check boxes to set default letter printing options for all users:

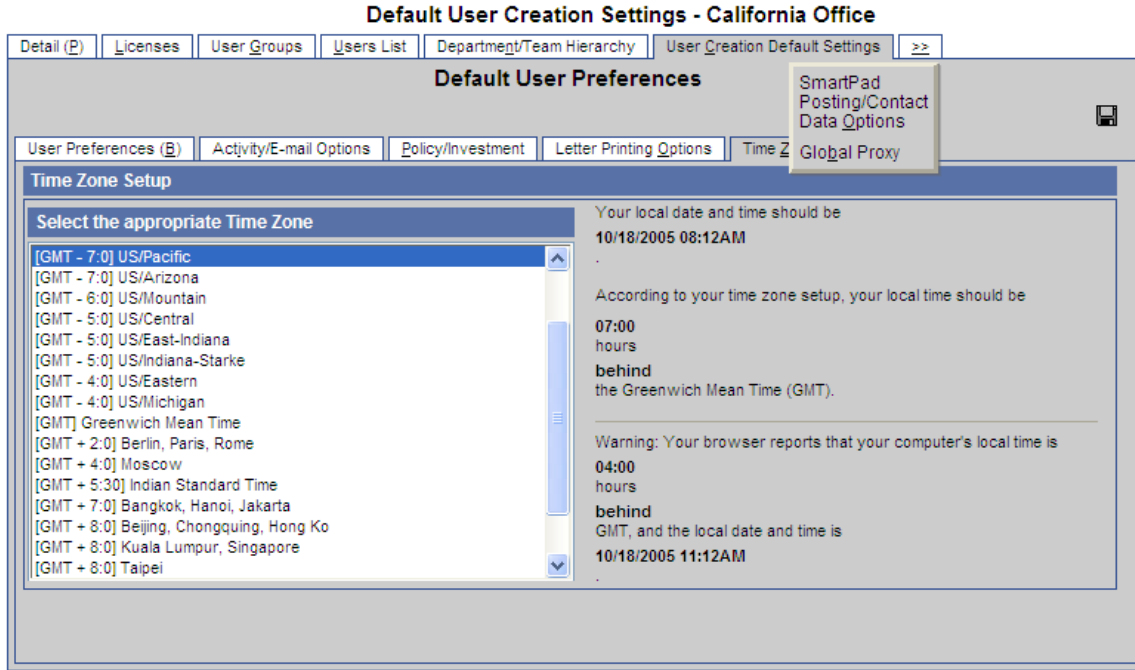
- The **Print One Letter per Household** option will ensure that only one letter will be sent to a household if more than one member of a household is selected when printing mass correspondence. Correspondence will be addressed to the contact specified as the head of household unless a salutation for the household is defined on the contact **Household** tab.
- The **Apply Contact's Mail Privacy** option will alert a user when a contact has requested not to be contacted via the selected method of correspondence.
- The **Preview before printing** option will automatically launch a print preview before sending the document to the local printer or SmartOffice Online printer queue.
- The **Post Letter Log/SmartPad** option will save all letters and envelopes generated and printed from SmartOffice Online to each selected contact's Letter Log and will post a notation to the SmartPad that the document was printed.
- The **Create Follow-up Activity** option will prompt the user to create a follow-up activity for every letter sent from SmartOffice Online.
- The **E-mail Word Document as HTML** option will include letter text in the body of the e-mail in HTML format (to preserve formatting) as opposed to sending the document as an attachment.

Time Zone Tab

The Time Zone tab allows you to specify the default time zone for your users. For instance, if most of your users are in New York, you would select the Eastern time zone.

SmartPad Posting/Contact Data Options Tab

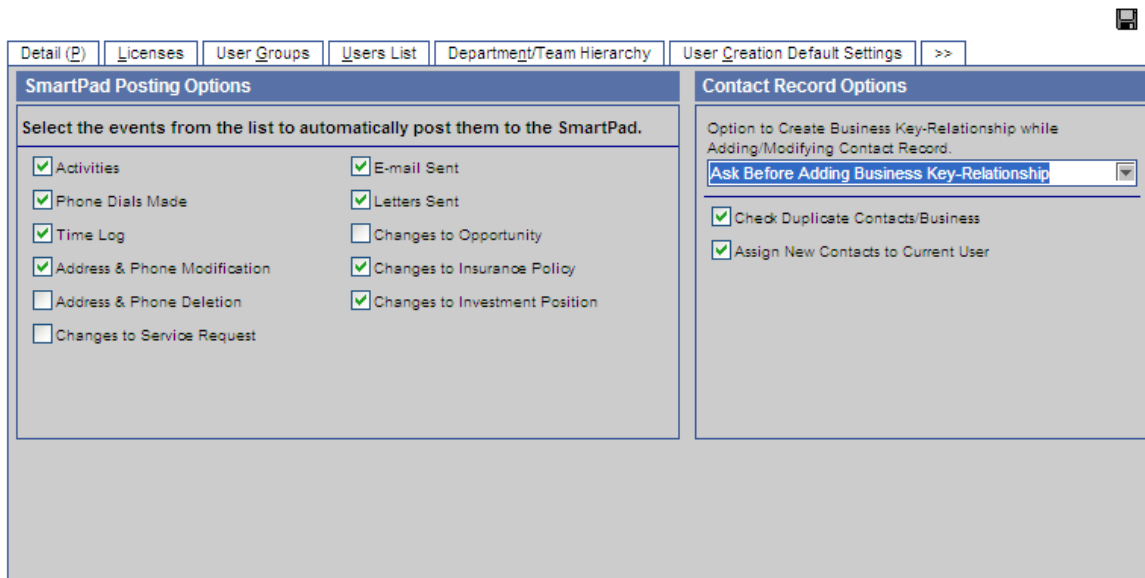
Click on the right arrows next to the User Creation Default Settings tab and select SmartPad Posting/Contact Data Options.



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Figure 16: Accessing the SmartPad Posting/Contact Data Options Tab

Office Administration - California Office



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Figure 17: SmartPad Posting/Contact Data Options Tab



SmartPad Posting Options

The SmartPad is a chronological file or “smart” notepad that keeps track of actions related to each contact. Check the box next to each action/event that you would like automatically posted to a contact’s SmartPad.

Note: *Unlike the entries in the default User Creation Default Settings, the entries in this screen cannot be changed by users who do not have the Access Security Information role.*

Create Business Key Relationships while Adding/Modifying Contact Record

When adding or modifying a Contact record in SmartOffice Online, you may choose to link the record to a previously created business record (via a hyperlink on the Business Name field). This allows you to quickly change the business address and business phone number for all records linked to a business.

The entry you make in this field will control whether the contact record is added to the Key Relations of the Business record. Choices for this field are:

Add Business Key-Relationship
Ask Before Adding Business Key-Relationship
Don’t Add Business Key-Relationship

Check Duplicate Contacts/Business

The **Check Duplicate Contacts/Business** option will display a warning if a user is adding a contact/business that may already exist in the office.

Assign New Contacts to Current User

If you select **Assign New Contacts to Current User**, each new contact added by a user will be assigned to him/her. This may have significant implications depending on how your office security is configured. Before checking this option, it is important that you read and understand *Step 4: Understanding How Security Affects Data Entitlement* on page 22.

If this option is not selected, at the time a contact is added, the user will be prompted to assign this contact to one, selected, or all SmartOffice Online users.

Note: *If you are s a single user in an office, select this option.*



Step 4: Understanding How Security Affects Data Entitlement

Note: *If you are a single user in an office or if you do not want to set up any internal security in your multiple user office (i.e., all users will be able to view all data), follow these steps to turn off office security: From the SmartOffice Online side menu, click Office Setup, then select Office Settings. On the Detail tab of the Office Administration screen, click Modify and uncheck the “Enable Security Within Office” box. Save your changes. Skip to Step 5: Understanding How User Roles Affect Feature Access on page 25.*

Before you begin to use SmartOffice Online, it is important that you take a little time to understand how data security is handled so you can configure your office to meet your unique business requirements.

This section answers questions such as:

- How can I prevent other agents in the office from accessing my data but still allow my secretary to view my data?
- Can one contact record be shared with multiple producers?
- How can I hide my private data from others?
- My new business reps and clerical staff are responsible for servicing the clients and prospects for all of my producers. Is it possible to create a group of users who have access to the same data?

Contact Assignment

In SmartOffice Online, contact records may be assigned to one, multiple, or all users. Contact records not assigned to any user will be accessible to all users in your office.

Contact records can be assigned individually using the User Assignments section on the contact’s Add’l Personal tab or they can be mass assigned from the Contact Summary screen by clicking on More Features then selecting Mass Assignment.

Proxy/Department Hierarchy

In SmartOffice Online, a proxy is a user who has authority to view contact records assigned to one or more other users. For example, if you have new business clerks or assistants who work for multiple producers, they must proxy for those producers in order to view contact records assigned to those producers.

You can manually create proxies or use the Department/Team Hierarchy graphical user interface to create proxies. This topic is covered in Step 7: Establishing Department/Team Hierarchy or Proxies on page 36.

Private Records

Occasionally, a user may wish to designate certain contact records as private so that no one else can access the record. Once a record is marked as private, the user can choose to allow a selected number of users to view the private contact records or to allow no users to view it at all. If no users are granted access to the record, it will only be visible to the user who marked it private.

Note: *In order to mark a record as private, a user must have the supplemental “Record Privatization” role enabled. For more detail on User Roles, see Step 5: Understanding How User Roles Affect Feature Access on page 25.*

User Groups

A User Group is a collection of users that functions like a single user for the purpose of assigning contact records or creating activities. A User Group can be used to assign contact records to a select number of users without having to assign the record to each user individually. For instance, if users Karen, Daniel and Roberta are in a User Group called “Phil’s Group,” all three users will be able to view contact records assigned to “Phil’s Group.”

Once User Groups are established, granting access to a specific set of contact records is as easy as adding a user to the group. Likewise, restricting access to a specific set of contact records may be accomplished by removing a user from the User Group.

Adding a user to a User Group does not grant proxy access to the other members of the group. In the example above, if Karen has some contact records assigned just to her, Daniel and Roberta would not be able to view those records unless they were set up as proxies for Karen.

In addition, if one of the users in the group marks a record as private, the other members would not be able to see the record.

This topic is covered in Step 8: Creating User Groups on page 41.

SuperUser

Someone designated as a SuperUser can view all records in your SmartOffice Online office regardless of assignment (excluding private records for which they have not been granted access), User Group membership, or Proxy status.

Summary

In summary, if office level security is turned on, a user can only see a contact record based on the following conditions:

- The user is a SuperUser and therefore can view all records in the office.
- The contact record is assigned to the current user.
- The contact record is assigned to the user’s User Group.
- The contact record is not assigned to any user.
- The contact record is assigned to a different user for whom the current user proxies (via Department Hierarchy or individual proxy set up).
- The contact record is not marked as private.
- The contact is marked as private, but the current user has been granted specific access to see the record.

Refer to the following sample office diagram to see how these concepts apply to a typical office setup.

Daniel Odell Insurance Agency

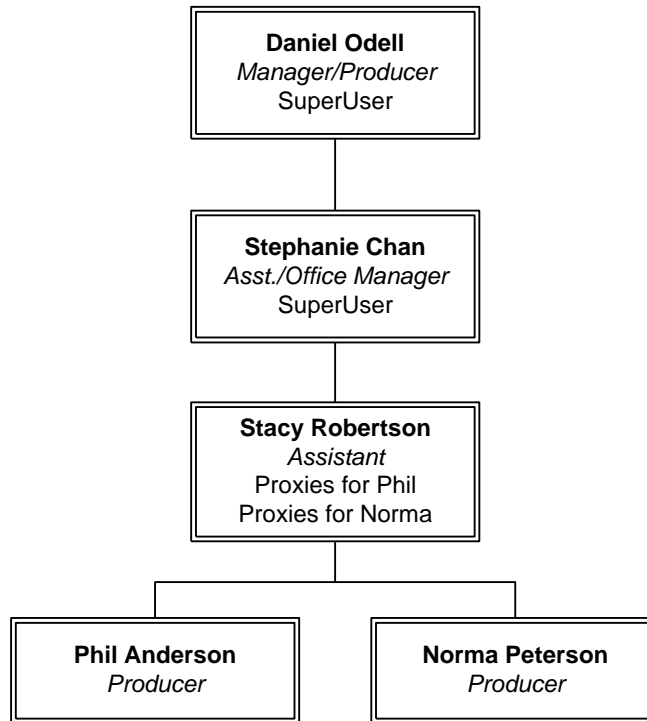


Figure 18: Sample Office Configuration

- Daniel Odell, the managing producer, is set as a SuperUser so he can view all non-privatized records in the office regardless of assignment.
- Stephanie is also set as a SuperUser so she, too, can view all non-privatized records.
- Stacy is the Administrative Assistant for both Phil and Norma. She proxies for both producers so she can view records assigned to either Phil or Norma.
- Phil has no proxies established so he can only view records assigned to him (or unassigned records). The same is true for Norma.

Step 5: Understanding How User Roles Affect Feature Access

SmartOffice Online is equipped with role-based security to control user access to different features and functions. Setting up security and assigning module access and user privileges is a very important component in ensuring the proper operation of SmartOffice Online.

This section covers questions such as:

- What are user roles?
- Can I make it so that a specific user can only view data and not modify or delete data?
- Can I restrict a user from creating letters?
- Who can create users in my office?
- Who is able to create proxies for other users?

User Roles

Every user added to SmartOffice Online must be assigned a user role which will control his or her ability to perform certain functions within an office. Each of the SmartOffice Online user roles are explained below. Take a moment to familiarize yourself with these roles as you will need to assign a role to every user you create.

Administrator Roles

Note: *When your office is created by E-Z Data, a Users/Licenses Admin user will be created based upon your entries in the SmartOffice Online Office / Admin User Form. You will receive an e-mail with the login information for this user. Make sure you change the password for this user and keep it confidential.*

Users/Licenses Admin.	Enables license administration in addition to the functions listed for the Access Security Information role.
Access Security Info.	Enables modifications of Office Detail, Departmental Hierarchy, Partial Hierarchy, User Creation Default Settings, SmartPad Posting/Contact Data Options, Global Proxy, Group Management, User Roles, Module Access Control, Current User Proxies For, Proxies for Current User, Error Log and Deleted Contacts information. If a user in the System Office is given this role, Office Hierarchy modification is enabled.
Enterprise View	For organizations that have established an office hierarchy, this enables the user to view offices below the logged in office within that hierarchy.
DataXchange Enterprise	Enables access to the DataXchange side menu in order to monitor and control processing as well as run reports and resolve processing errors for DataXchange Enterprise.
Record Privatization	Enables the user to privatize records such as Filters, Dynamic Reports, Contact Records, SmartPad records, and Activities.
Data Import/Export	Enables rights to both import contact data into SmartOffice Online using the Data Import Wizard and export spreadsheet data using the Export Spreadsheet button located on various spreadsheets throughout the system. This also controls the ability to export and import Filters and Dynamic Reports.



Column Layout Customizaion

- Office-Level Spreadsheet Customization** This enables the user to customize the spreadsheet layout for the entire office.
- User-Level Spreadsheet Customization** Enables the user to customize the spreadsheet layout for themselves.

Office Setup Options

- Custom Screen Prompt Customization** Enables the user to customize the field labels on custom tabs.
- Choice Customization** Enables the addition and modification of choice values.
- Form Letter Maintenance** Enables the ability to add, modify, and delete form letters, labels, envelopes, and templates.
- Word Track Maintenance** Enables the ability to add, modify, and delete Word Track scripts.
- Key Relationship Lookup Modification** Enables the user to modify key relationship lookups.
- Faxing** Enables the ability to fax documents.
- Access to Data Validation** Enables access to the data validation functions.
- Home Page Customization** Enables access to the Home Page customization features.
- Contact Assignments** Enables the user to assign contact records to users even if the user is not listed in the User Assignment list for the contact.
- Record Sharing Option** Applicable only to Enterprise View users. Enables users to share records with users in other offices.
- Job Queue Agent Maint.** Enables the ability to add, modify, and delete Job Agents.
- Created Jobs Maint.** Enables the ability to access and delete Job Queue entries.
- Marketing Campaign Mgmt.** Enables access to Marketing Campaigns.

Reporting Options

- Dynamic Report Maint.** Enables the user to add, modify and delete Dynamic Report definitions.
- Filter Maintenance** Enables the user to add, modify and delete Filters.
- Excel Template Maint.** Enables the user to add modify and delete Excel templates.
- Group Reporting** Enables the user to select multiple users for reporting. Without this enabled, the user can only run reports for one user at a time
- Run Crystal Reports** Enables the user to run already defined Crystal Reports.
- Crystal Reports Admin.** Enables rights to add custom Crystal Reports and set up the custom settings for existing packaged Crystal Reports.
- Marketing Options** Enables access to the Marketing Options button on spreadsheets.



Mass Operation

- Mass Deletion** Enables the user to delete more than one record at a time within a spreadsheet.
- Mass Modification** Enables the user to modify a selected column for more than one record at a time within a spreadsheet. This also includes the Area Code Changes feature.
- Mass Correspondence** Enables the right to send correspondence to more than one contact at a time. The Mass Correspondence button displays on applicable spreadsheets and is used to send up to 100 pieces of correspondence simultaneously. To send over 100 pieces of correspondence, select the Mass Correspondence option on the Reporting/Marketing expanded menu.
- Mass Activity Creation** Enables the creation of more than one activity from a spreadsheet.
- Mass Assignments** Enables the user to change the assignment for contact, activity, primary advisor and opportunity records.

E-mail Interface User Roles

- SmartMail** Enables SmartMail functionality
- SmartMail for Outlook**

Advanced Contact Management Features, Calendar Functions, and Advisor Management Features

- Button/Sidebar access** Enables access to specified spreadsheet buttons and menu items.

Modules/Licenses

Basic Roles

- Base SmartOffice** This is the standard user role and enables access to the basic contact management features of SmartOffice Online.
- eOCS** The eOCS user role is the same as the Base SmartOffice user role except that the default contact search and summary is the electronic version of the One Card System's Card File. The calendar and activity tracking functions are also different to accommodate the special needs of eOCS users. This user role provides access to special reports and other functions as found under the eOCS side menu.
- Agency Package** Enables access to SmartCaseManager, SmartAgency and the base system.

SmartLeads/SmartOpportunities

- Leads Coordinator** Enables rights to assign, reject and revoke leads as well as run statistic reports for advisors.
- Leads** Enables the Leads module rights for the advisor.
- Opportunity** Enables the Opportunity module.
- Opportunity Setup Admin.** Enables access to administrative setup information.



SmartPolicies/SmartInvestments

Policy Tracking	Enables access to the Policy Tracking module.
Pending Case Mngmt.	Enables access to the Pending Case Management module.
Advisor Contract/License Management	Enables access to the Licensing, Errors & Omissions, Continuing Education, Contracting and Appointment sections of the Advisor module as well as the Setup section in order to manage this information.
Pending Case & Policy Setup Administrator	Enables Office-level Setup. This includes the capability to modify the Master Requirement List, Setup Requirement Follow-up Days, Status Exclusion, Pending Case Workflow and SmartView for Advisor Privacy defaults. This also enables the Pending Case Setup sub-menu. The Setup menu enables access to the Master Setup List that includes the DataXchange Setup menu and Initial Requirement Load for System Office users. DataXchange Setup allows 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
Group Benefits (Group Policy)	Enables access to the Group Benefits module (Group Policy).
Investment Tracking	Enables access to the Investment Tracking module.
Asset Allocation	Enables access to the Asset Allocation feature.

Mobile Solutions

SmartOffice Mobile for PC	Enables SmartOffice Mobile for PC.
SmartOffice Mobile for PDA	Enables SmartOffice Mobile for PDA.

SmartWholesaler

Wholesaler Setup Admin.	Enables the administrative setup functions for the Wholesaler module.
Wholesaler	Enables the Wholesaler module.

SmartCommissions

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 access to all levels of payment in the hierarchy chain.
CTM Supervisor View	Similar to the description given for the CTM Advisor View, this enables access to commission records for the advisor and supervisor levels.
CTM Advisor View	Not to be confused with the SmartView for Advisor product, this role restricts how much commission data a person in the office can view over and above the access the user may already have to specific



advisors within SmartOffice Online. CTM 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 enables only the viewing of commission records at the advisor level. Supervisor and house transactions will not be available for viewing.

CTM Base

Enables access to contract setup and rate setup, and provides the ability to import commission data from insurance carriers for the purpose of reporting on the data only.

SmartRecruiting

Recruiter Setup Admin.

Adds everything that the Recruiter license adds and enables access to the Setup menu item.

Recruiter

Adds the Recruitment Tracking side menu. This enables access to the Candidate/Recruit summary and detail information and the Recruiting Activity Management (RAM) Reports.

SmartSeminars

Seminar Tracking

Enables the Seminar Tracking module.

DataXchange Online Services

Process HO Pending Case Status Info.

Enables access to the HO Pending Case menu items

SmartLink for iPipeline

Enables access to iPipeline downloads.

SmartWorkflow

WFM Administrator

Enables the administrative functions of the WorkFlow Management module.

WFM User (Read-only)

Enables read-only access to the WorkFlow Management module.

Integration

Albridge

Enables synchronization of accounts and positions with Albridge.

Data Delivery

Enables Data Delivery integration.

Financial Profiles+

Enables Financial Profiles+ integration.

Intellisys

Enables Intellisys integration.

LaserApp

Enables LaserApp integration.

PaperClip

Enables PaperClip integration.

Call Center

Call Center Administrator

Enables the administrative functions of the Call Center.

Call Center Supervisor

Enables the supervisory functions of the Call Center.

Call Center User

Enables the Call Center functions.

User Role Templates

User Role Templates are a quick way to standardize the roles assigned to users in your office.

Note: You must be assigned a Users/Licenses Administrator or Access Security Information user role to manage User Role Templates.

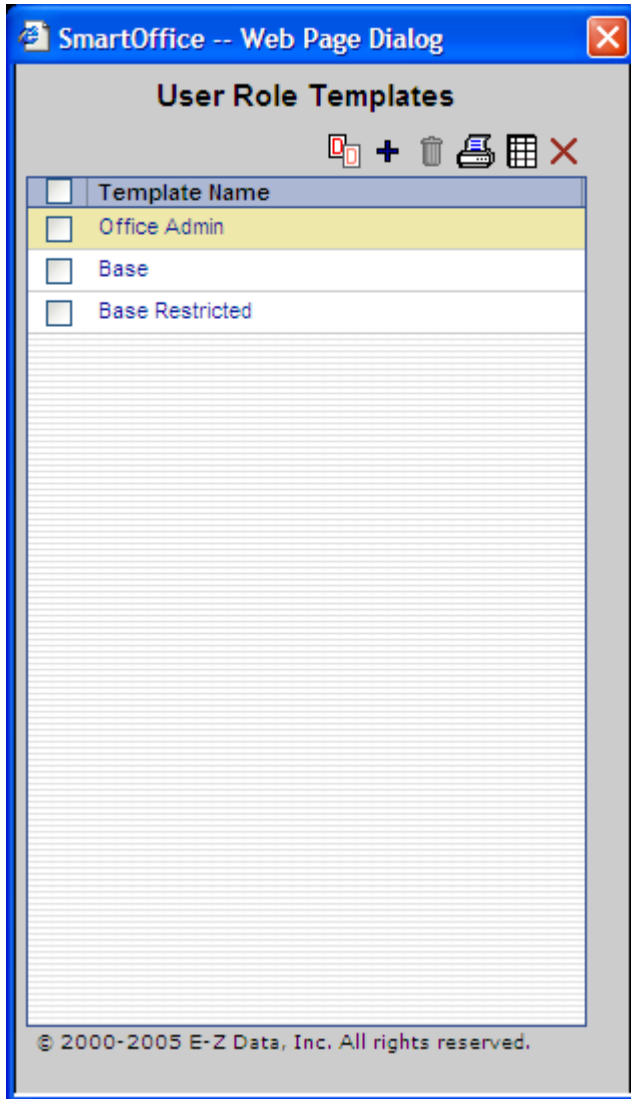


Figure 19: User Role Templates Screen

Adding User Role Templates

1. To access User Role Templates, select **User Setup** then **User Role Templates** from the side menu.
2. Click **Add (+)** to add a new User Role Template.
3. In the **Template Name** field, enter the name you would like to give to this new User Role Template.

4. Check the User Role options you would like to include in this template.

Note: *Module roles cannot be included in a User Role Template. Module access is controlled from **User Setup, User Management**. We will cover setting up users in Step 6: Creating Users on page 32.*

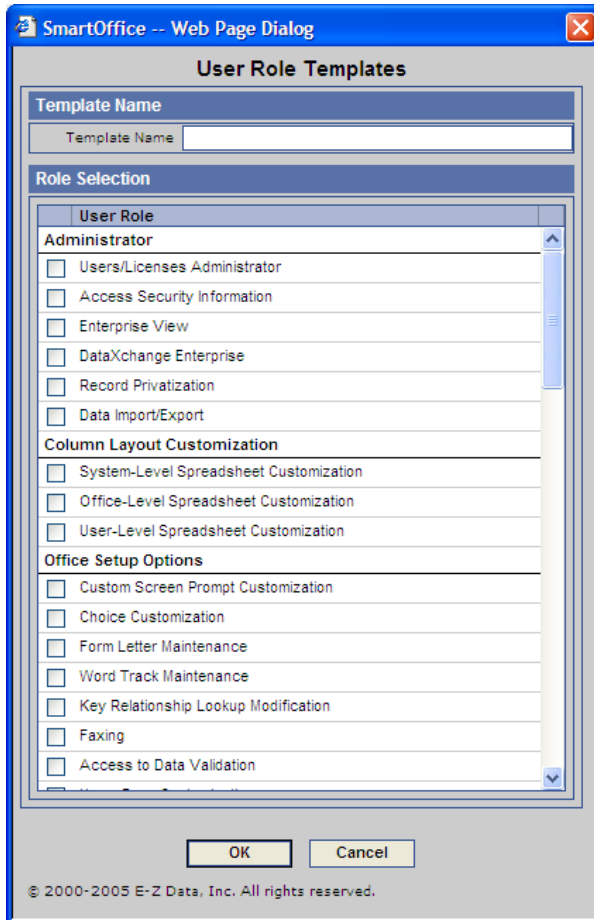


Figure 20: User Role Template Creation Screen

5. When finished assigning the desired roles, click **OK**.
6. The template will be added to the list of available templates.

Copying User Role Templates

1. To access User Role Templates, select **User Setup** then **User Role Templates** from the side menu.
2. Tag (click the box to the left of) the template you would like to copy.
3. Click the **Copy User Role Template** icon (next to the + icon).
4. In the **Template Name** field, enter the name you would like to give to this new User Role Template.
5. Make the desired changes to the User Role selection and click **OK** when finished.
6. The template will now be added to the list of available templates.

Step 6: Creating Users

Now that you have read about office security and user roles, you're ready to make a list of users you would like to add to your office. The list should contain information such as the user name, login name, role, additional designations, etc. To assist you with this process, we've included a *User List Worksheet* at the end of this document. Remember, only a Users/Licenses Administrator user can create new users and assign licenses.

1. Complete the User List Worksheet at the end of this document. Login to SmartOffice Online as the Admin user and click **User Setup** on the side menu, then select **User Management**.
2. From the User Search Options dialog box, click **Add**.
3. Using the completed User List Worksheet as a reference, enter the information pertaining to the user to be added. Each option is described below.

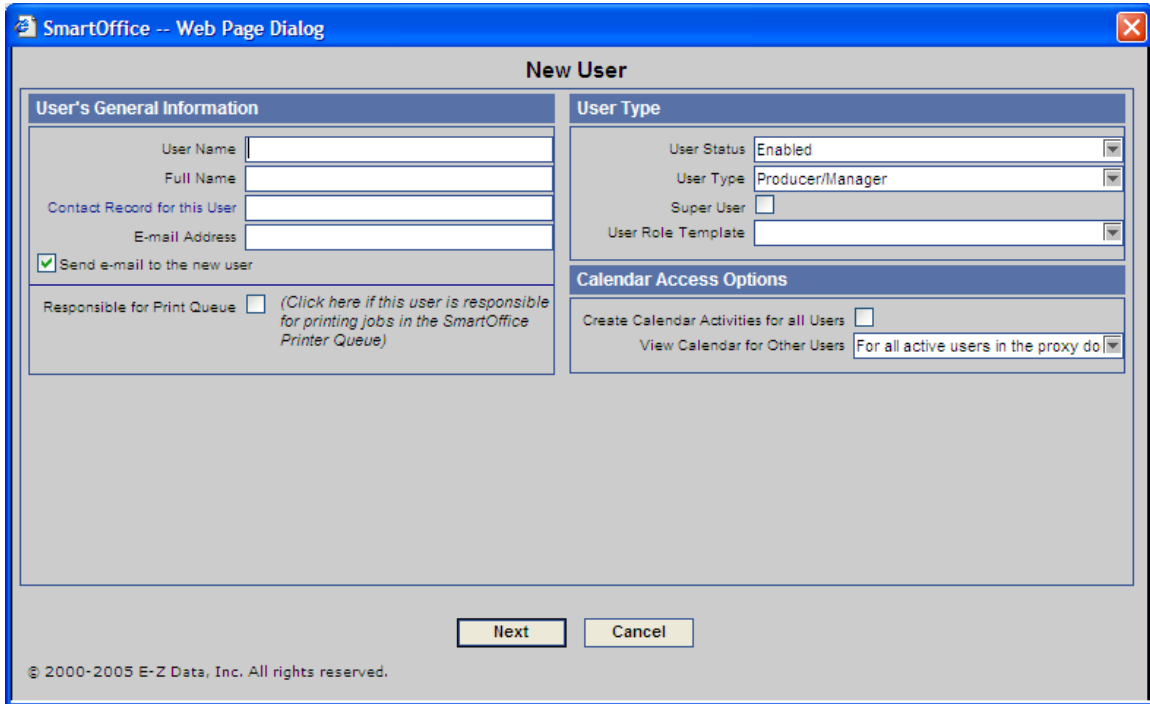


Figure 21: Add New User

User Name

This is the name the user will type in the User Name field when logging in to SmartOffice Online.

Full Name

Enter the full name of the user (e.g., Tom Smith).

Contact Record for this User

Each user may have an associated contact record in SmartOffice Online. Contact record associations are critical to take full advantage of user related merge codes (e.g., name, title, address, phone numbers, etc.) available for letter writing. If this user is an Advisor, link their advisor record in order to use agent-specific merge codes. If the user does not currently have



a contact or advisor record entered in SmartOffice Online, the link can be established after the record has been created.

E-Mail Address

An entry is required in the E-mail address field. When the user record is created, SmartOffice Online will send the login information for this user to the e-mail address specified. In addition, when a user's password is changed, they will receive notification via e-mail.

Responsible for Print Queue

If this user has the responsibility of printing for the office, click in this field, then select a printer. When users in the office select "Print on Printer Queue" as the letter output option, the print job will be sent to the Job Queue of this user. The user responsible for the print queue will be alerted that there is a job in the queue and then can process the job.

This feature is especially handy for remote or traveling employees who do not have access to a printer or to letterhead.

User Status

There are two user statuses in SmartOffice Online: Enabled or Disabled.

Users cannot be deleted from SmartOffice Online, as their notes, activities, etc. would also be deleted. If an employee has left your company or for other reasons is no longer accessing SmartOffice Online, change their status to "Disabled." Disabled users cannot login to SmartOffice Online.

User Type

Select the appropriate User Type. Make sure to specify Producer/Manager for all agents so agent merge codes will be used for letters.

SuperUser

A user designated as a SuperUser bypasses all proxies and assignments in SmartOffice Online and can see everyone's data except private records for which they have not been granted access. When a SuperUser logs in, it is as if no security has been established in the office; therefore, this role is generally reserved for the office manager.

If you have or will be enabling security within your office and you would like this user to be able to view all records regardless of assignment, click in the SuperUser box. If you designate another user as being a proxy for this user, that user will also be able to see all records in the office.

User Role Template

If you have created User Role Templates and would like to assign one to this user, select it from the drop down list. If you have not created User Role Templates or do not want to select a predefined template, you may do so later.

Create Calendar Activities for all Users

If you would like this user to be able to schedule calendar activities for all users in your SmartOffice Online office, even if this user does not proxy for any other users, click here. This option does not give the user access to another user's contact records, it simply allows them to schedule activities for other users.

View Calendar Activities for Other Users

You may allow this user to view other users' calendars. Select from the following options:

For all active users in the office: Enables access to the active users' calendars. The view is limited to the calendar view. Note that the user will not be able to access the Activity Detail dialog box of those contact records that the user cannot see based on the proxy and assignment rules.

For all active users in the proxy domain: Enables access to the active users' calendars within the proxy domain.

For all users in the office: Enables access to all the users' calendars in the office. The view is limited to the calendar view for those records the user cannot see. Note that the user will not be able to access the Activity Detail dialog box of those contact records that the user cannot see based on the proxy and assignment rules.

For all users in the proxy domain: Enables access to all of the users' calendars within the proxy domain.

This function is not available: Enables access only to the user's calendar.

4. When you are finished making your entries, click **Next**.
5. The Select user roles screen displays. If you did not specify a User Role Template on the previous screen, select the appropriate role(s) on the left side of the screen.

Note: Depending on the modules purchased, your screen may have fewer options than the screen below.

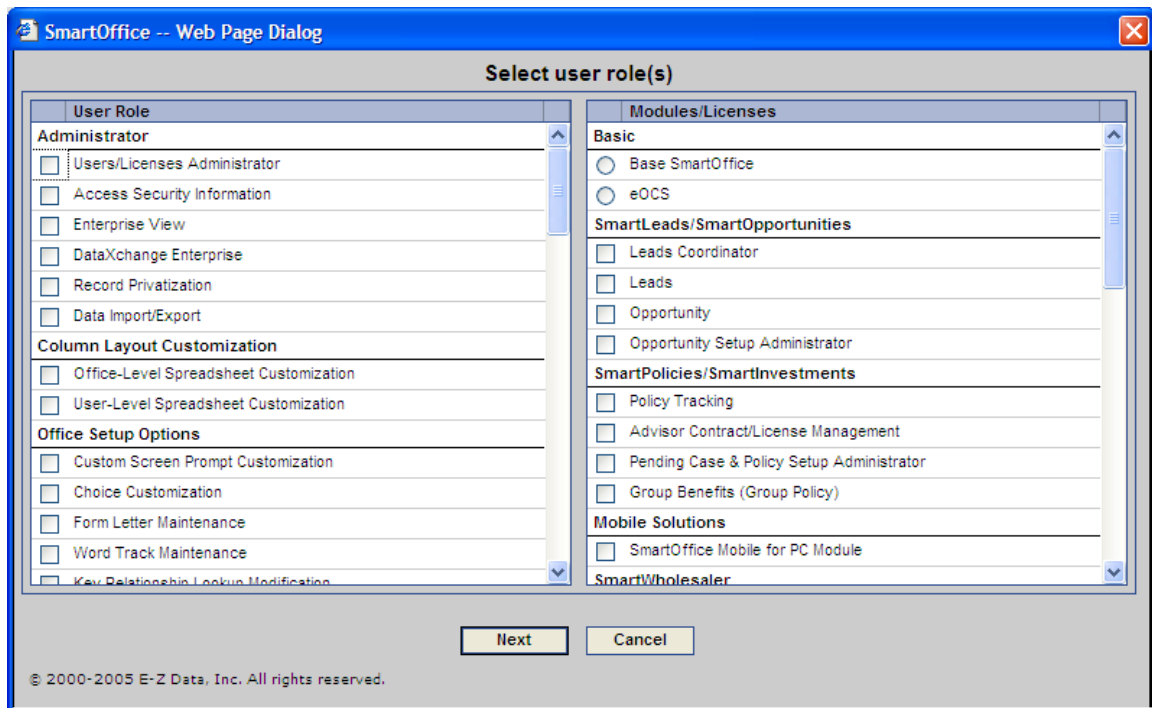


Figure 22: Select User Role(s) Screen

6. Select the appropriate Module role(s) from the right side of the screen. Note that selecting certain modules will result in other modules being automatically selected. For example, if you select Pending Case Management, Policy Tracking will automatically be selected as you need to access policies to process pending cases.
7. When finished, click **Next**.
8. The Select User Roles screen displays as shown below. Depending on the modules assigned, the options you see may be different than those shown below. This screen allows you to specify the appropriate privileges for these functions/modules. Please note that a Read Only role still uses one license.

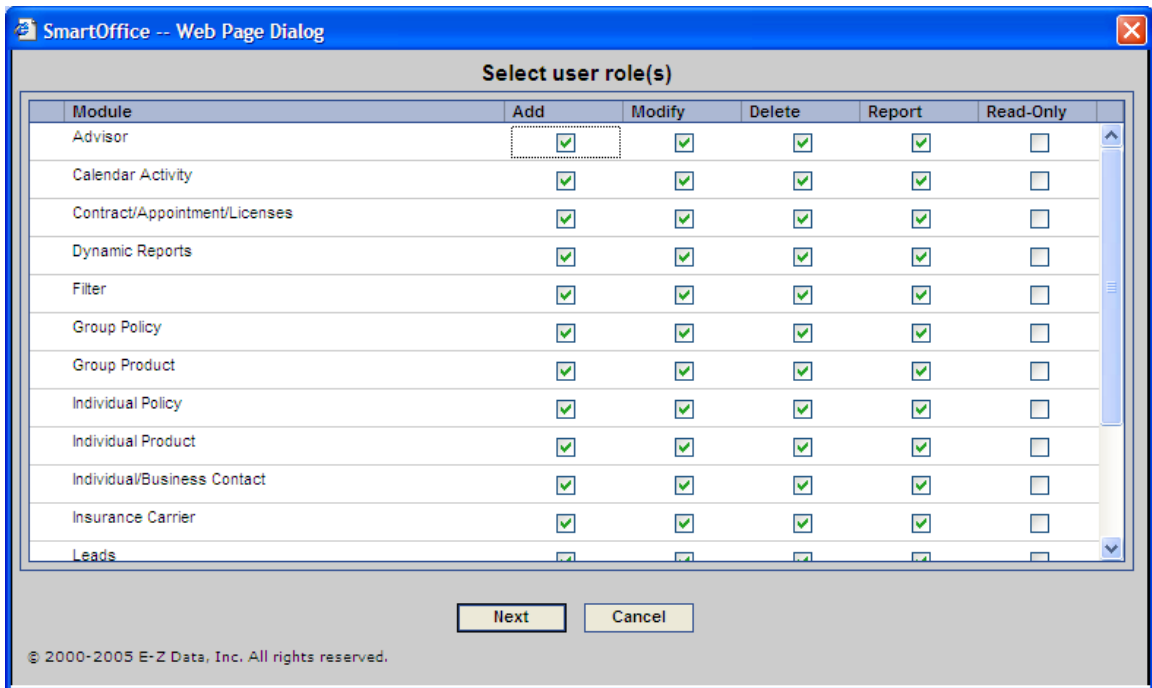


Figure 23: Select User Roles

9. Make the appropriate selections and click **Finish**.
10. The user will be added to SmartOffice and their password will be sent to them with their login information.
11. From the New user added successfully screen, you may choose to modify this user or add another user. If you are finished, adding users, click Close.

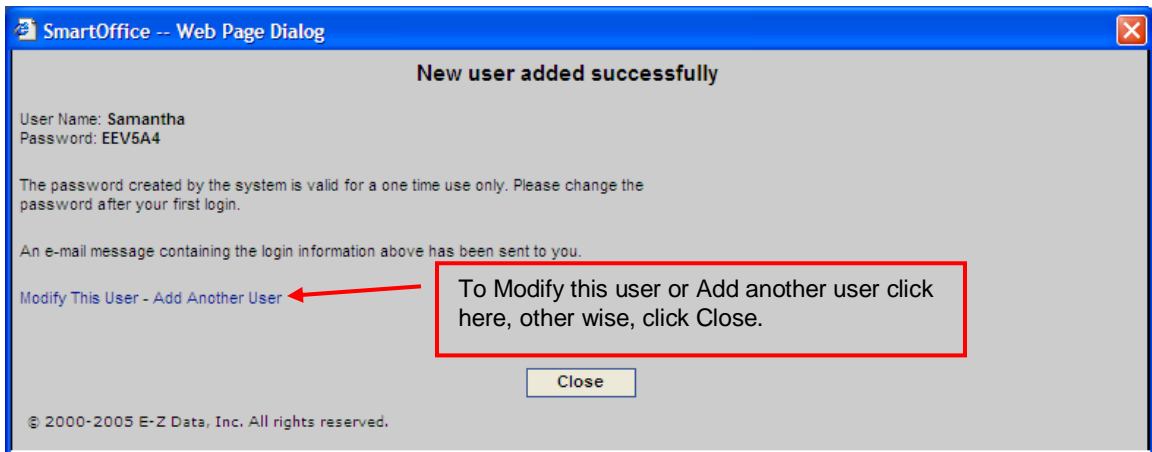


Figure 24: New user added successfully screen

Step 7: Establishing Department/Team Hierarchy or Proxies

The Department/Team Hierarchy feature allows you to create “departments” within your organization for the purpose of providing data access to the members of those departments or team.

For instance, let’s say you have a group of new business clerks who all need to see the calendars and contacts for the advisors in the office. Using the Department Hierarchy feature, you could add the new business clerks to a “root” department and then add all the advisors to a department below the root department. This would enable the new business clerks to see the contact records and calendars of all the advisors, but the advisors would not be able to see the contacts and calendars for the new business clerks.

The Department/Team Hierarchy feature also allows you to specify whether members within the group can proxy for each other (i.e., see each other’s contacts or calendars). In this example, you might want the new business clerks to proxy for each other, but you may not want the advisors to proxy for each other (i.e., if they don’t proxy for one another, each advisor would see his/her own data only). As discussed in *Step 4: Understanding How Security Affects Data Entitlement* on page 22, a proxy is a user who has authority to view contact records assigned to other users.

The Department Hierarchy feature allows you to create proxies quickly and easily via a graphical user interface; however, proxies can also be established using the SmartOffice Online proxy feature. Both methods of creating proxies are covered in this chapter.

Note: *The Department/Team Hierarchy and Proxy functions are not applicable to SuperUsers since they can already view all records in your SmartOffice Online office regardless of assignment.*

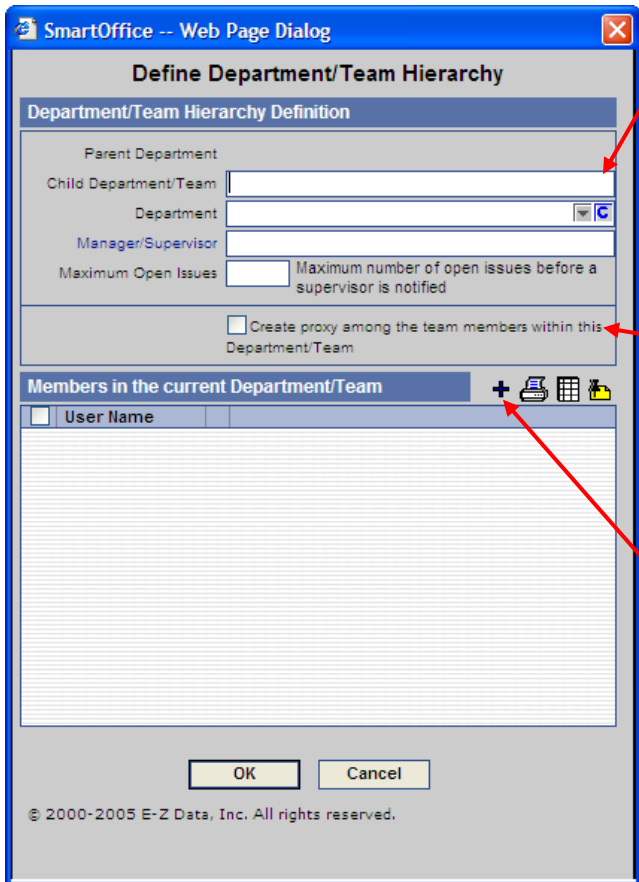
Creating a Department Hierarchy

1. From the SmartOffice Online home page, click **Office Setup** then **Office Settings**.
2. Click on the **Department/Team Hierarchy** tab.
3. From the Department/Team Hierarchy Definition screen, click **Add New Root Department/Team**.



Figure 25: Department/Team Hierarchy Definition

- In our example above, the new business clerks will be in the root department. The Define Department Hierarchy screen displays as show below.



Enter the name of the root department. For our example, we would enter **New Business Clerks**. Skip the Department, Manager/Supervisor, and Maximum Open Issues fields as they are not applicable.

If you would like the members of this group to proxy for each other (see each other's records and activities), click the **Create proxy among users in this department** box.

Click **Add** to add users to this group. When the list of users displays, tag (select) the users you would like to add to this group and click **OK**.

SmartOffice populates the list with the selected users. Click **OK** to return to the Department Hierarchy Definition screen.

Figure 26: Define Department/Team Hierarchy Screen

- To create a department beneath the current department, click **Add New Department below the Current Department**.

Department/Team Hierarchy Definition

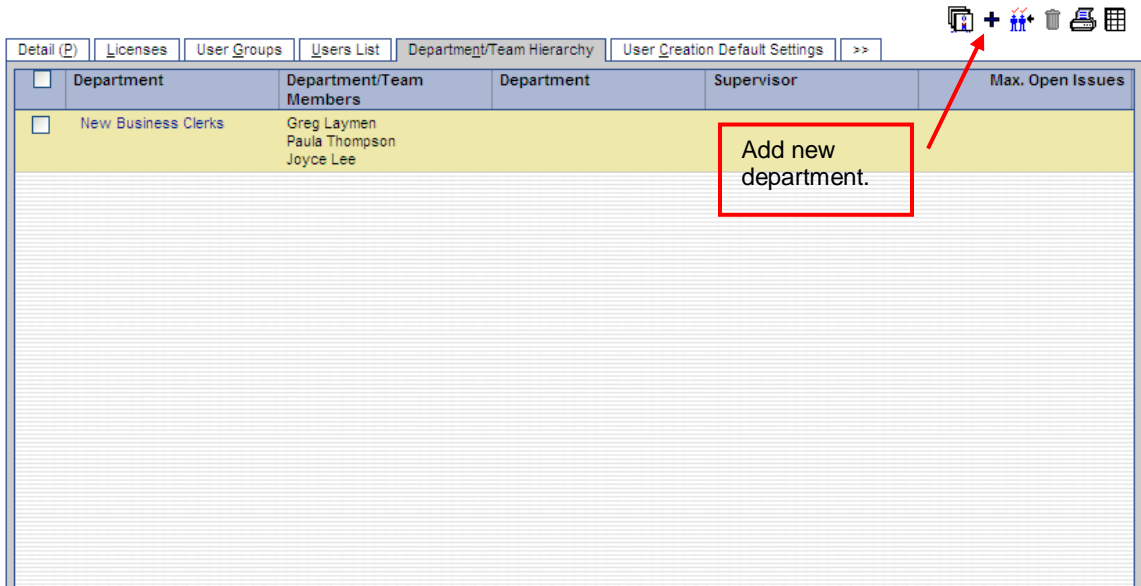


Figure 27: Department/Team Hierarchy Definition: Add Department

- Complete the Define Department/Team Hierarchy screen as described above. When finished, the Department/Team Hierarchy screen will show your new departments.

Department/Team Hierarchy Definition

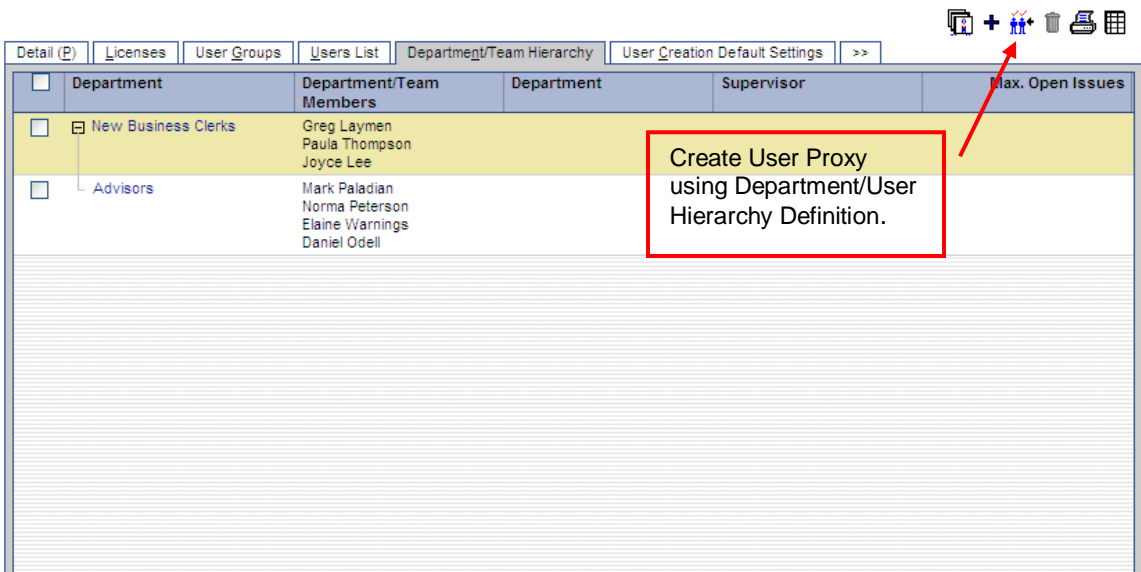


Figure 28: Department/Team Hierarchy Definition: Create Proxies

- When finished creating departments, click **Create Proxy using Department/User Hierarchy Definition** to create the proxies according to your department definition.
- You will be prompted to delete all manually created proxies before creating the new proxies based upon the new Department Hierarchy. Click **Yes** if you would like to wipe out any existing proxies or no to retain existing proxies.
- A message will display indicating the proxies were successfully created. Click **OK**.


Proxies

You may individually create proxies, or check existing proxies, using the SmartOffice Online proxy setting.

1. To access the proxy tabs, click **User Setup** then **User Management** from the side menu.
2. Without entering a user name, click **Search** from the User Search Options window.
3. The User Summary screen displays as shown below.

Note: You may view the Global Proxy Summary by clicking on Office Setup then Office Settings from the side menu. Click the last tab (with two arrows) and select Global Proxy to display the list.

User Summary



Summary	Detail (P)	User Roles/Licenses	Module Access Control	User Preferences	Current User Proxies For	Proxies For Current User (E)	>>
User Full Name	Status	User Type	Login Name				
<input type="checkbox"/> Carl M. Mathews	Enabled	AdvisorVu User	Carl				
<input type="checkbox"/> Elaine Warnings	Enabled	Producer/Manager	Elaine				
<input type="checkbox"/> Fred T. Lewis	Enabled	AdvisorVu User	Fred				
<input type="checkbox"/> Greg Laymen	Enabled	Staff	Greg				
<input type="checkbox"/> Manny Silverman	Enabled	Staff	Manny				
<input type="checkbox"/> Mark Paladian	Enabled	Producer/Manager	Mark				
<input type="checkbox"/> Michael L. Ashcroft	Enabled	Producer/Manager	Michael				
<input type="checkbox"/> Norma Peterson	Enabled	Producer/Manager	Norma				
<input type="checkbox"/> Paula Thompson	Temporary Password	Staff	Paula				
<input type="checkbox"/> Phillip Anderson	Enabled	Producer/Manager	Phil				
<input type="checkbox"/> Randy Clarke	Enabled	Producer/Manager	Randy				

Records Shown: 11 Total Records: 11

Figure 29: User Summary

Current User Proxies For

The **Current User Proxies For** tab allows you to specify whose records the current user may view.

1. Tag (click the box to the left of the user name) the user for whom you would like to view proxy settings.
2. Click on the **Current User Proxies For** tab. You will see the current user's name entered by default. This is the so user may see records and activities assigned to them.
3. To allow this user to proxy for another user or users, click + to display a list of users.
4. Tag each user whose records should be seen by the current user and click **OK**.



Proxies For Current User

The **Proxies for Current User** tab allows you to see the list of users who are currently proxying for this user (i.e., all users who can view the selected user's data). You cannot change proxy assignments from this screen. You must do it via the Department/Team Hierarchy feature or via the Current User Proxies For tab.

Step 8: Creating User Groups

As previously discussed, user groups allow you to create groups of users for the purpose of assigning contacts or creating activities.

1. To access User Groups, click **User Setup** then **Group Management** from the side menu.
2. The **User Group Summary** screen displays listing all defined User Groups.

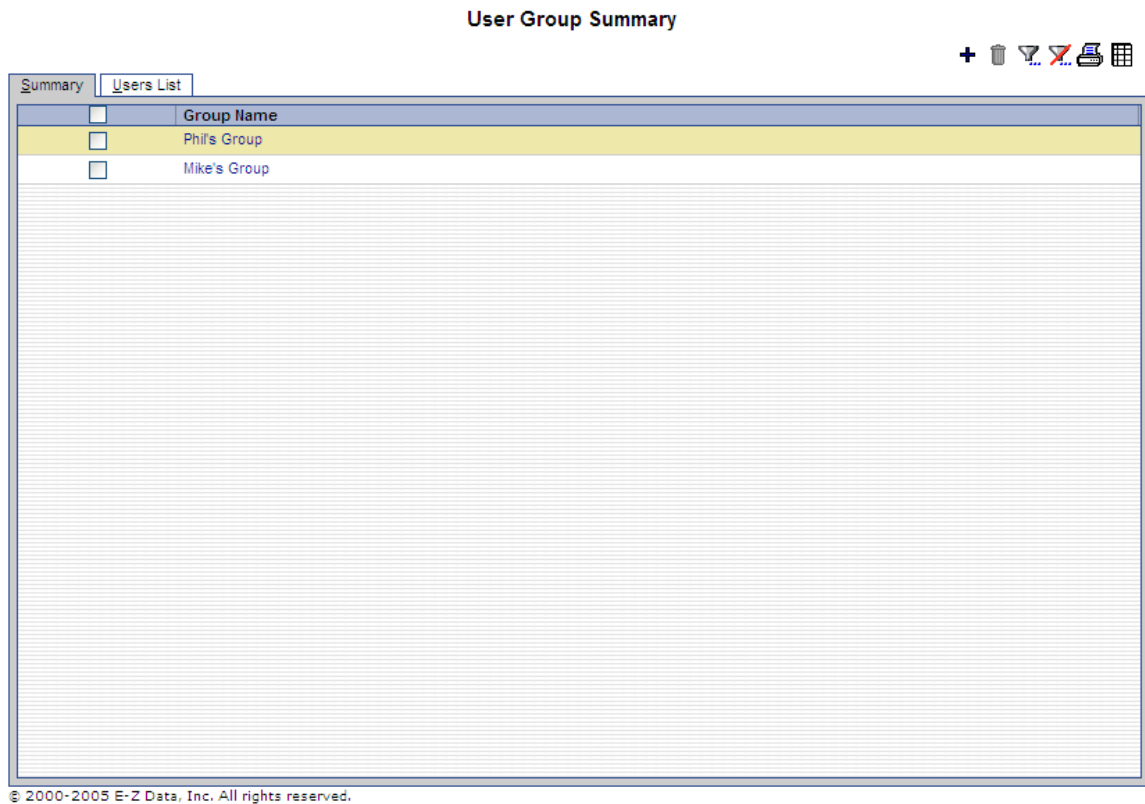
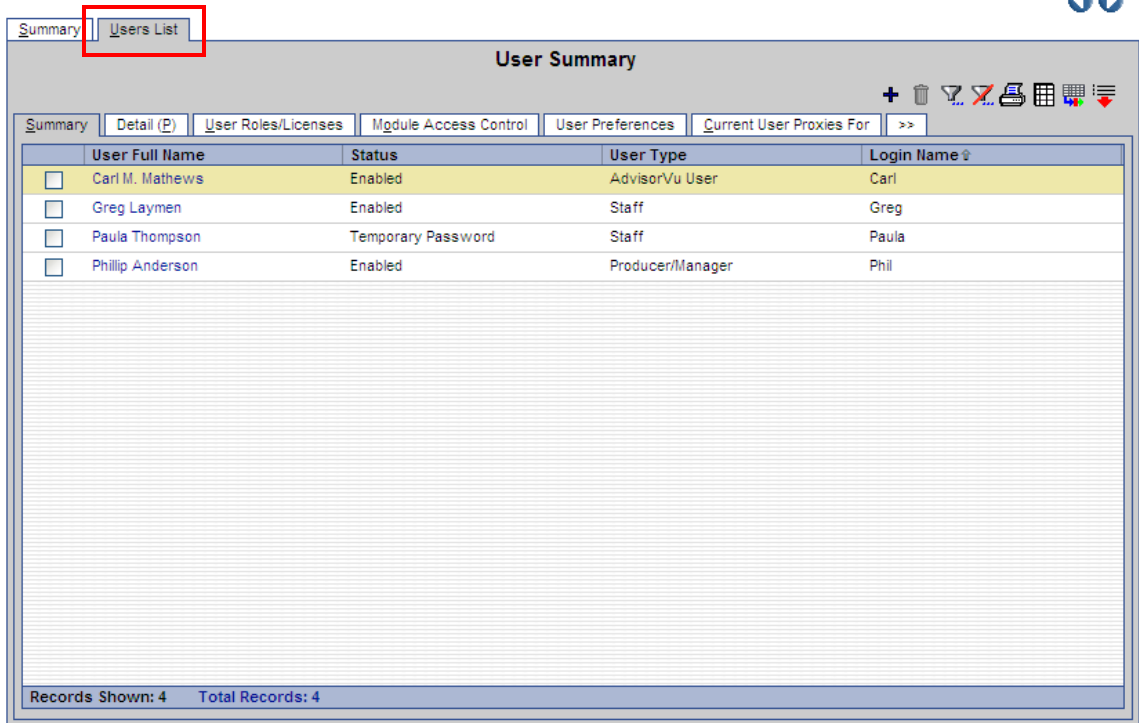


Figure 30: User Group Summary

3. Click **+** to add a new User Group.
4. Enter the group name and a more detailed description then click **OK**.
5. To add members to a group, highlight the group name and click the **Users List** tab.

User Group - Phil's Group



User Full Name	Status	User Type	Login Name
<input type="checkbox"/> Carl M. Mathews	Enabled	AdvisorVu User	Carl
<input type="checkbox"/> Greg Laymen	Enabled	Staff	Greg
<input type="checkbox"/> Paula Thompson	Temporary Password	Staff	Paula
<input type="checkbox"/> Phillip Anderson	Enabled	Producer/Manager	Phil

Records Shown: 4 Total Records: 4

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Figure 31: User Group Summary Tab – Users List

6. The User Summary screen displays. Click **+** to add members to the group.
7. When the list of users displays, select the users to be added to this group and click **OK**.
8. The User Summary screen now lists all members in the group.

Note: *User groups will display along with regular user names when adding activities or when assigning contacts. To create activities for or assign contacts to a User Group, simply select the group name when prompted.*

Step 9: Configuring and Using SmartMail for Outlook

The SmartMail for Outlook interface allows you to post Outlook e-mail messages, both sent and received, to the SmartPad (notepad) of the appropriate contact record(s) in SmartOffice Online. No more cutting and pasting e-mail text!

Note: *This feature works with Microsoft Outlook 2003 and above only. It will not work with other e-mail programs such as Outlook Express, Lotus Notes, Eudora, etc. If you have not yet configured Outlook to send and receive e-mail, contact your Internet Service Provider (ISP) or your company's IT support team, whichever is appropriate.*

Preparing to Use SmartMail

1. To ensure the proper operation of this feature, Microsoft Outlook must be installed and configured correctly on your computer and be designated as the default mail program. To check this, from SmartOffice Online (or other Web-based program), click **Tools**, then **Internet Options**. Click the **Programs** tab and ensure that **Microsoft Office Outlook** appears in the E-mail drop-down menu. Click **Apply** then **OK**.
2. You must be assigned the "SmartMail for Outlook" User role to use this feature. Note that only an admin user can change this setting: From the main menu, click **User Setup** then **User Management**.
3. From the **User Search Options** dialog box, enter your User Name and click **Search**.
4. With your user record selected, click on the **User Roles/Licenses** tab.
5. On the left side, in the User Role section, scroll down until you see the **E-Mail Interface** section. Check the box to the left of "SmartMail for Outlook" option.

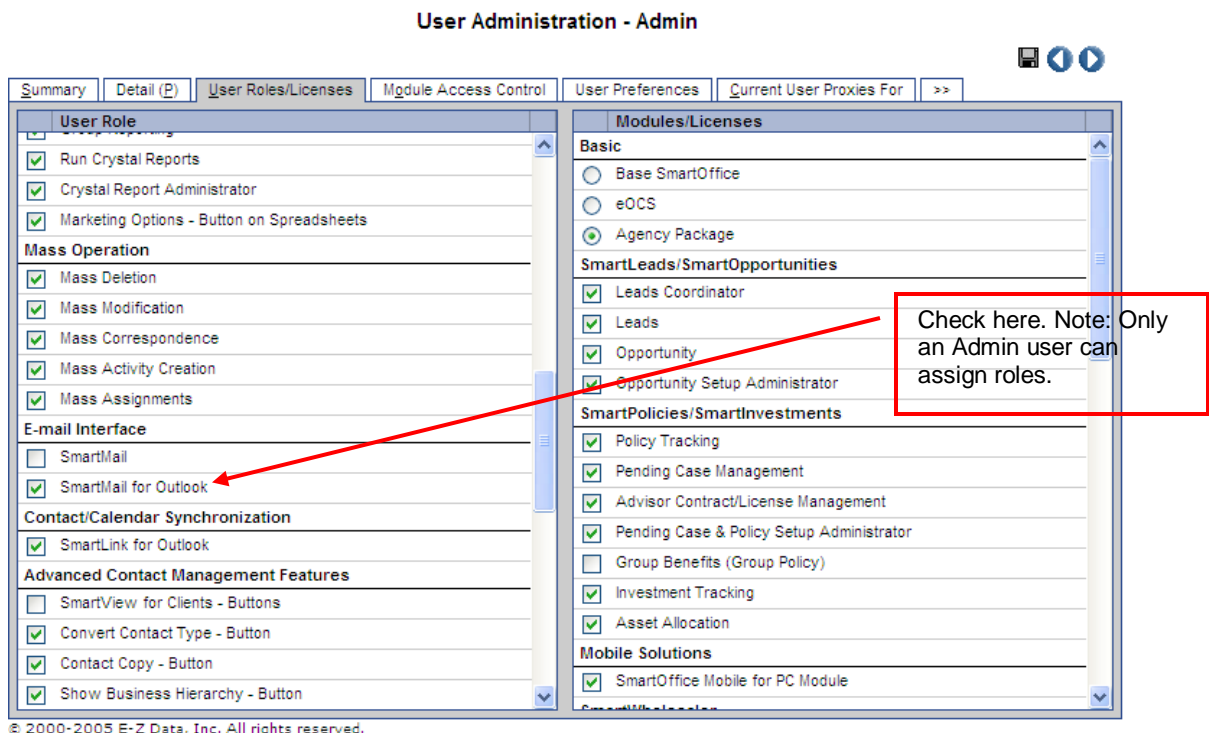



Figure 32: User Roles/Licenses tab

Installing SmartMail for Outlook

1. To install the SmartMail for Outlook interface, click **User Setup** then **Installations** from the side menu.
2. Click **SmartMail for Outlook**.

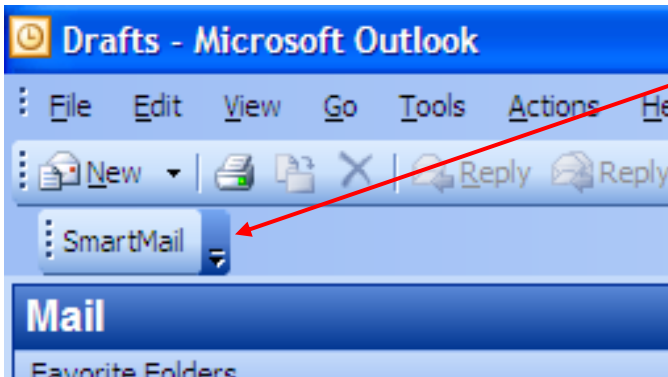
Download	Description	
SmartOffice Mobile	Enables synchronization of SmartOffice data with a notebook PC.	
SmartLink for Outlook	Enables SmartOffice contacts and activities to synchronize with Microsoft Outlook.	
SmartLink for Word	Enables SmartOffice to import and export documents to and from Microsoft Word.	
SmartScanner	Enables a scanner interface. Allows embedding of scanned documents.	
SmartDialer	If using a modem or network telephony system, allows phone numbers to be dialed directly from SmartOffice	
SmartLink for Spreadsheet Export	Enables SmartOffice to export spreadsheet data in Comma Separated Values, Tab Separated Values, and XML formats into the Browser, Notepad, Microsoft Excel and Microsoft Word applications.	
SmartLink for Excel Reports	Enables SmartOffice to export report data to Microsoft Excel.	
SmartMail for Outlook	Enables SmartOffice to use Microsoft Outlook for sending e-mail messages and posting them to the SmartPad.	
Adobe Acrobat Reader Site	Downloads Adobe Reader, used for printing spreadsheets and reports.	
Download SmartOffice Static Content	Downloads static pages into cache. Makes SmartOffice run faster.	
Download Crystal Reports Viewer	Downloads Crystal Reports Viewer, used to display and print reports available on the Crystal Server.	
SmartLink for Windows Explorer	Enables the posting of files from Windows Explorer to various areas of SmartOffice.	

Click here.

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Figure 33: Installations Menu

3. The installation will take place in the background and will happen very quickly.



To verify that the installation was successful, open Outlook and look for the **SmartMail** button on the Toolbar.

You may need to log out then log back in to Windows before the button will display.

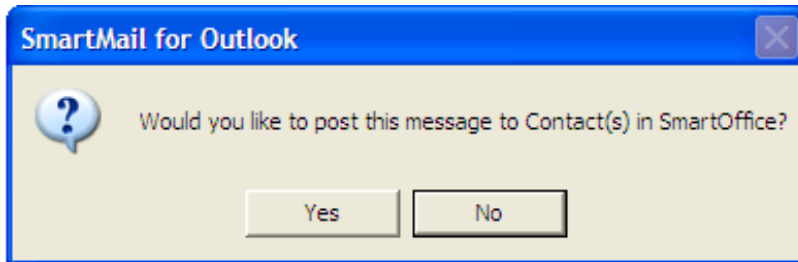
Figure 34: SmartMail Button from within Outlook

Sending and Posting Messages from Within SmartOffice Online

There are two ways to send an e-mail from within SmartOffice Online. Each is described below.

Using the E-mail Link from the Contact Record

1. Go to the appropriate contact's Personal tab and click on their e-mail address.
2. The standard Outlook message window will display with the contact's e-mail address in the "To" field. Compose your message and when finished, click **Send**.
3. You will be prompted to post this message to one or more contacts in SmartOffice Online.



4. Click **Yes**.
5. The following message will display (if you have not applied the Windows security patches, this message will not display):



6. Check the "Allow access for" box and select the desired time period.
7. Click **Yes** to allow SmartOffice Online to access Outlook.
8. A window displays prompting you to select the contacts whose SmartPads will be updated with the content of this message.

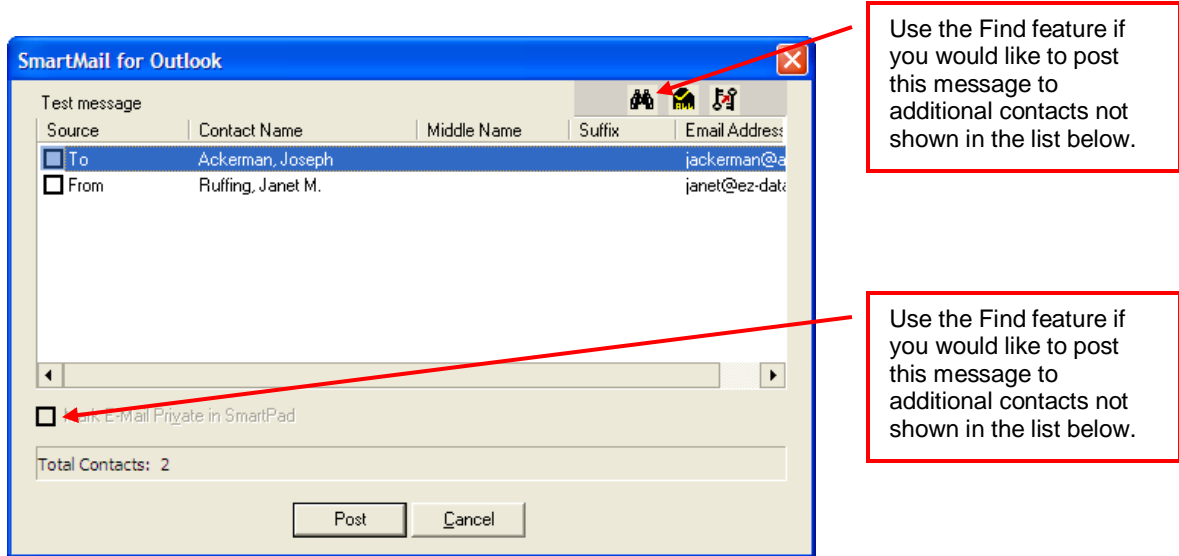


Figure 35: Outlook E-Mail Interface Screen

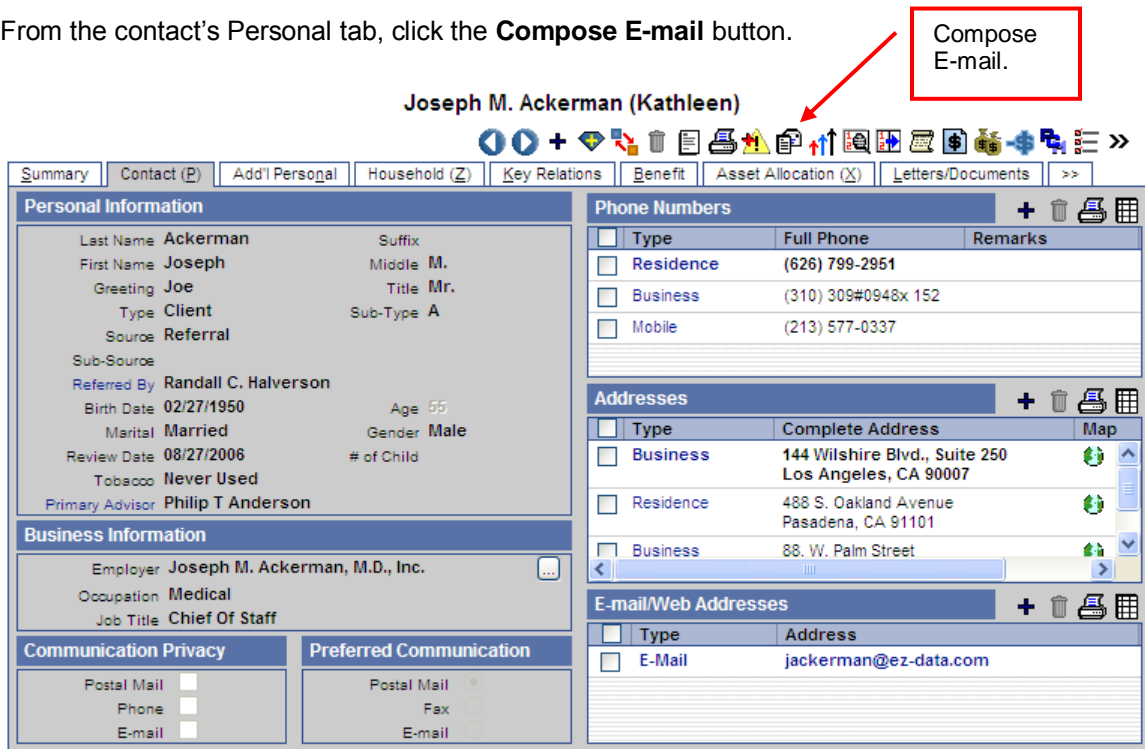
9. Click in the box to the left of each contact whose SmartPad you would like to update with the contents of this e-mail. Click **Post**. The message will be sent via Outlook and posted to each selected contact's SmartPad.

Note: *When you are logged in to SmartOffice Online and create an e-mail from within Outlook, you will still be prompted to post the message to one or more contacts in SmartOffice Online. Follow the steps outlined above.*

Using the Compose E-mail Feature

The Compose E-mail feature gives you some additional flexibility when sending e-mail messages. Using this feature, you may send a message to other users in your office *regarding* the current contact and have it posted to the contact's SmartPad.

1. From the contact's Personal tab, click the **Compose E-mail** button.



Joseph M. Ackerman (Kathleen)

Summary | Contact (P) | Add'l Personal | Household (Z) | Key Relations | Benefit | Asset Allocation (X) | Letters/Documents >>

Personal Information		Phone Numbers	
Last Name	Ackerman	Type	Full Phone
First Name	Joseph	Residence	(626) 799-2951
Greeting	Joe	Business	(310) 309#0948x 152
Type	Client	Mobile	(213) 577-0337
Source	Referral		
Sub-Source			
Referred By	Randall C. Halverson		
Birth Date	02/27/1950		
Age	55		
Marital	Married		
Gender	Male		
Review Date	08/27/2006		
# of Child			
Tobacco	Never Used		
Primary Advisor	Philip T Anderson		
Business Information		Addresses	
Employer	Joseph M. Ackerman, M.D., Inc.	Type	Complete Address
Occupation	Medical	Business	144 Wilshire Blvd., Suite 250 Los Angeles, CA 90007
Job Title	Chief Of Staff	Residence	488 S. Oakland Avenue Pasadena, CA 91101
		Business	88. W. Palm Street
Communication Privacy		E-mail/Web Addresses	
Postal Mail	<input type="checkbox"/>	Type	Address
Phone	<input type="checkbox"/>	E-Mail	jackerman@ez-data.com
E-mail	<input type="checkbox"/>		
Preferred Communication			
Postal Mail	<input type="checkbox"/>		
Fax	<input type="checkbox"/>		
E-mail	<input type="checkbox"/>		

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Figure 36: Contact record: Personal Tab

2. The Compose Mail Options screen displays. Refer to the screen below for instructions on completing the screen.

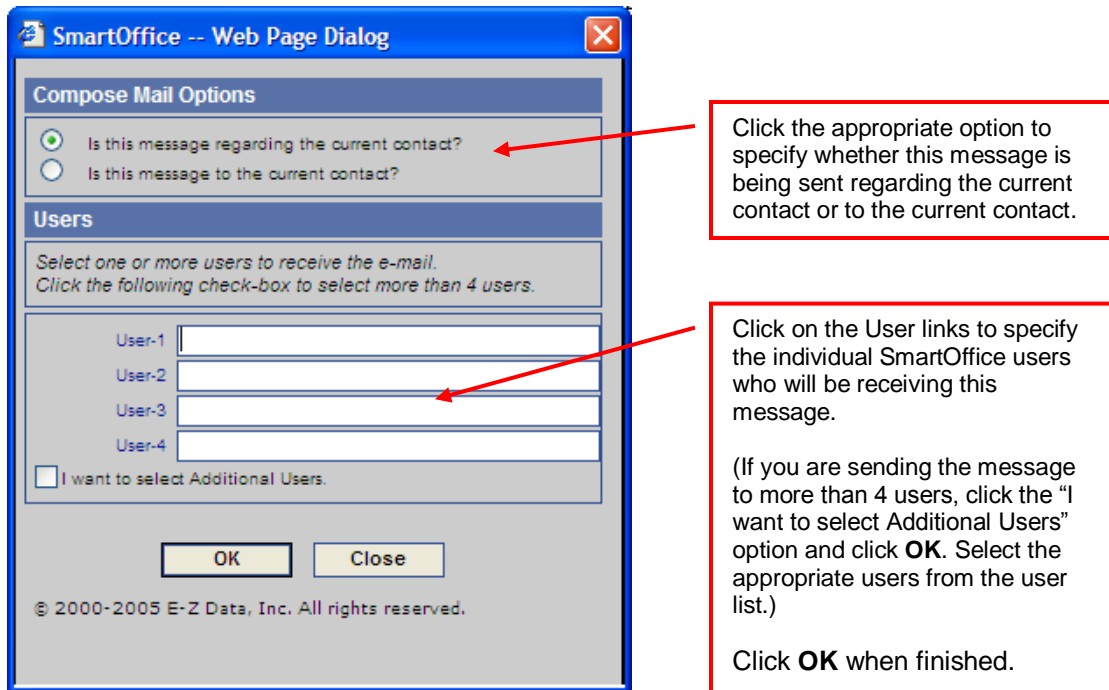


Figure 37: Compose Mail Options

3. The standard Outlook message window will display with the appropriate e-mail address(es) in the "To" field. Compose your message and when finished, click **Send**.
4. Follow steps 3 through 9 starting on page 45.

Posting Previously Sent/Received Messages

To post an e-mail that was sent or received previously via Outlook, follow these steps:

1. Log in to SmartOffice Online.
2. Log in to Outlook and highlight the message you would like to post.
3. Click the **SmartMail** button and you will be prompted to select the contacts whose SmartPads should be updated with the contents of this message.
4. Select the appropriate contact(s) from the list and/or using the Find feature.
5. Click in the box to the left of each contact whose SmartPad you would like to update with the contents of this e-mail.
6. Click **Post**. The e-mail will be posted to each selected contact's SmartPad.

Step 10: Training Options

Successful business people 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 Online, careful attention must be given to learning how to properly use the system. The key, of course, is training. Ensuring that you and your staff receive the training needed to effectively perform your job functions is essential.

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

SmartOffice Orientation: This topic covers how to navigate in SmartOffice Online, access additional resources, select contacts, view data (notes, letters, activities, policies, etc.), and mine data for marketing purposes.

Contact Management: This topic covers how to use the screens that comprise a contact's record, customize field choices, add contacts to a set, establish key relationships, use advanced selection options, and run contact reports.

Activity Management: This topic covers 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: This topic covers how to use 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: This topic covers 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 Online.

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

When Should Training Begin?

You should begin training as soon as your office has been created by E-Z Data and you have completed the office and user setup according to the instructions in this guide.

If you are converting data from another system, training should begin **as soon as you send your data here for the trial conversion**. Once the trial conversion is completed, you will have a 10-day User Acceptance Testing (UAT) period during which you must review the converted data for accuracy and completeness. If you are not comfortable with SmartOffice Online, this will be a very difficult task.

Once you sign off on the UAT, you will resubmit your data for the final conversion. Once converted, the data will be loaded into your SmartOffice Online office and you will begin using the system. By completing training prior to this time, all users will be up and running very quickly.



Training Delivery Methods

Our 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

We offer a comprehensive series of online video training courses that are available **at no charge** from our Web site. Unlike other vendors' products, SmartOffice Online 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 your practice.

Each course is broken down into a series of lessons and "Fast Classes." The lessons cover the fundamentals of SmartOffice Online and the Fast Classes offer training on advanced tools and functionality not covered in the basic lessons. Every other week, a new Fast Class arrives via e-mail and is also posted to our Web site so the information is always fresh!

The lessons and Fast Classes combined provide comprehensive "nuts and bolts" training and make it possible to:

- "Attend" training classes anywhere there is an Internet connection
- View entire classes or just the lessons that you want to view
- See real time examples of SmartOffice Online functionality
- Train new staff members quickly and easily with no scheduling conflicts
- Take advantage of Fast Class sessions to learn specific SmartOffice Online functionality

We recommend that you (and your staff members) view *all* the online videos as a prerequisite to using SmartOffice Online or scheduling Web-based or live training. To access these videos, go to the following link:

<http://www.ez-data.com/support/smartoffice.shtml>.

Live Web-Based Sessions

Live Web-based training is a cost-effective, personalized training solution that combines the benefits of interacting with an E-Z Data instructor with the convenience of the Internet.

Web-based training sessions are generally used as a supplement to the online training sessions (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.

Live Web-based session rates are \$200/hour. Charge applies to preparation time for customized sessions as well for actual instruction time. You may use your company's Web-meeting and audio-conferencing facilities, or E-Z Data's facilities. E-Z Data's Web-meeting and audio-conferencing facilities are limited to 5 attendees plus the instructor.

If you have sufficient Web and audio conferencing facilities, this is an extremely easy and cost-effective way to offer valuable training to your staff.



On-Site Training

An E-Z Data trainer can be sent to your location to conduct a group training session for your 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, the staff members are free from their daily office distractions (phone calls, e-mails, etc.) and can completely focus on the material presented.

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

You may also elect to send one or more staff members for training at our Pasadena, California headquarters. One benefit of this approach is that this team will receive more individualized, intensive training than would occur in a larger group. In addition, product experts can be brought in to assist with advanced topics, if necessary. This team would become your in-house E-Z Data solution experts and would be an invaluable resource to the success of your project.




On-site training rates are \$1500/day, \$600 travel day fee, airfare, hotel, meals, and other expenses.

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

Step 11: Getting Technical Support Assistance

Our experienced and professional help desk staff members are just a phone call, fax, or e-mail away! The group's sole mission is to help you put SmartOffice Online to work in your practice. Whether you just need to be steered in the right direction or you have an involved question, our staff will be happy to help you.

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

- | | | |
|--|--|---|
|  E-mail | support@ez-data.com | <ul style="list-style-type: none">• Great option for non-critical issues• Be sure to include the registered user's name in the body of the e-mail or fax |
|  Fax | (800) 779-3123 | <ul style="list-style-type: none">• Please provide a complete description of the problem• 24 hour turnaround |
|  Telephone | (626) 585-3515 | <ul style="list-style-type: none">• Support center hours of operation are:
7:00am to 5:00pm PST Monday – Thursday
7:00am to 1:30pm PST Friday |

Named Support Contacts

Each office (one or multiple locations) with 50 or fewer users may specify up to 2 technical support coordinators to interface with our support department. One additional technical support coordinator may be added for each additional 25 users. This streamlines the support process by providing a common point of contact for your staff members as well as our technical staff.

Additional Resources

- Comprehensive online video training classes are available **at no charge** from our Web site. Type www.ez-data.com then go to the Training & Support page (or click the following link: <http://www.ez-data.com/support/smartoffice.shtml>). Additional product and support related information is also available from our Web site.
- As part of your SmartOffice Online subscription, you will receive a “Fast Class” movie every other week. These movies are generally ten minutes or under in length and spotlight various features of SmartOffice Online.
- For immediate assistance, try our robust online help system. Simply click the Help hyperlink shown at the top of SmartOffice Online screens to launch a context-sensitive help menu. No need to stop your work to open a manual!

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



User List Worksheet

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



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



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



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