Managing DataXchange Online (DXO) Services

User Guide

SmartOffice®

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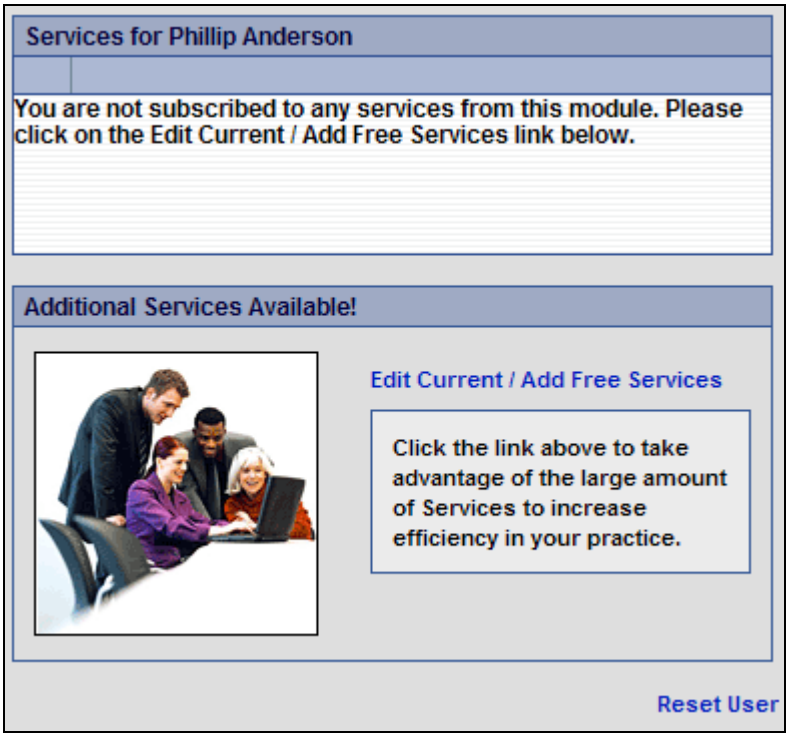
Working with the Subscription Management Dialog Box

To access the Subscription Management dialog box:

1. This dialog box can be accessed by selecting one of two methods:
   - From the Global Toolbar, click the **DXO** button.
   - From the Contact Summary or Detail tab, click the **DXO** button.
2. The services that have been subscribed to are listed in the **Services for [User Name]** dialog box. When no services have been subscribed to, the following message is displayed.

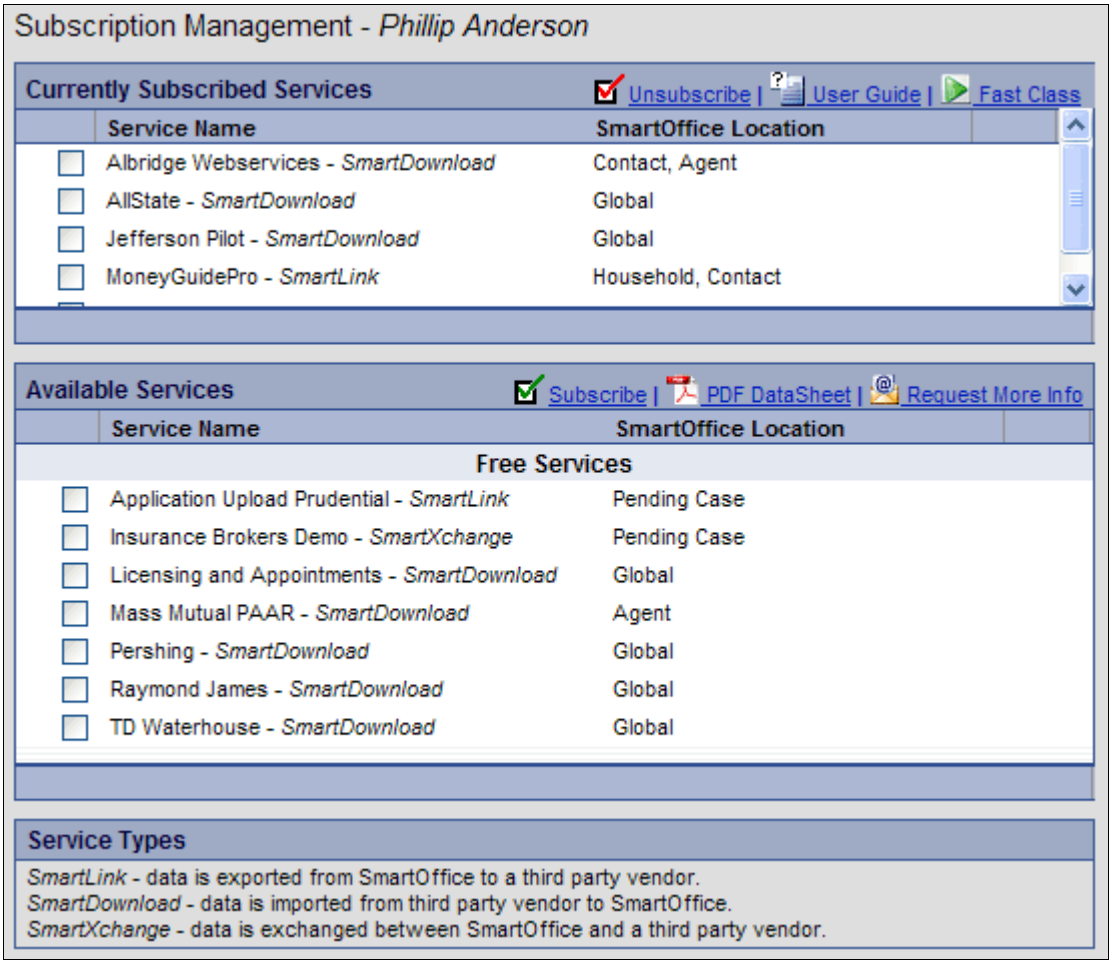


3. Click the **Edit Current/Add Free Services** hyperlink to open the Subscription Management dialog box.

The Subscription Management dialog box enables the user to view the following:

- **Currently Subscribed Services**: Lists all of the services to which the user is currently subscribed.
- **Available Services**: Lists all of the services that are available and enables the user to review the corresponding datasheet, request more information and subscribe to free services.

> **Note:** The User Guide and Fast Class buttons are only available for SmartOffice v6 and later.



Currently Subscribed Services

Column/Button	Description
Service Name	Name of the service.
SmartOffice Location	Module where the service is available. Global services are available from the following location: • DXO button from the Global Toolbar
Unsubscribe	The Unsubscribe button is available for free services only, such as WinFlex Web – SmartLink. To unsubscribe, select the corresponding option and then click the **Unsubscribe** button.

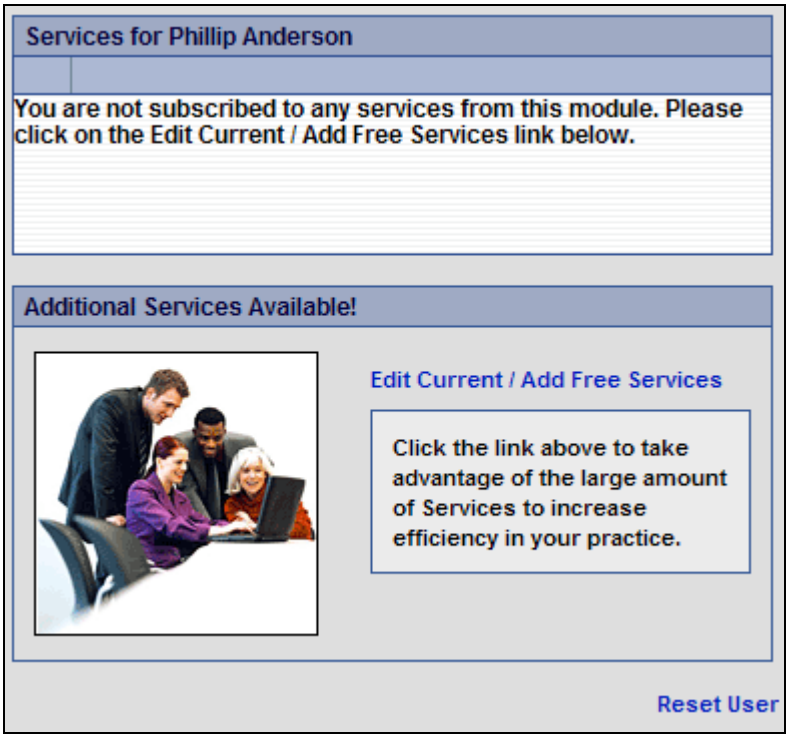
Available Services

Column/Button	Description
Service Name	Name of the service.
SmartOffice Location	Module where the service is available. Global services are available from the following location: • DXO button from the Global Toolbar
Free/Paid Services	Services are divided into two categories: • **Free**: Subscribe to free services immediately by selecting the corresponding option and then clicking the **Subscribe** button. • **Paid**: Contact a sales representative to add the service. Click the **Request More Info** button to have a sales representative contact you shortly.
Subscribe	The Subscribe button is available for free services only, such as WinFlex Web – SmartLink. To subscribe, select the corresponding option and then click the **Subscribe** button. See *Subscribing to Free Services* for details.
PDF Datasheet	PDF Datasheets are available for most paid services, enabling the user to learn more about these services. To view a service's datasheet, select the option that corresponds to the service and then click the **PDF Datasheet** button. The datasheet is displayed in a new Web browser.
Request More Info	Have a sales representative contact you to learn more about a service by clicking the **Request More Info** button. Clicking this button will open a dialog box requesting your contact information and the preferred method of contact (e.g., e-mail or phone). Click the **Contact Me** button to notify the sales department of the request for more information. A sales representative will contact you shortly.

Subscribing to Free Services

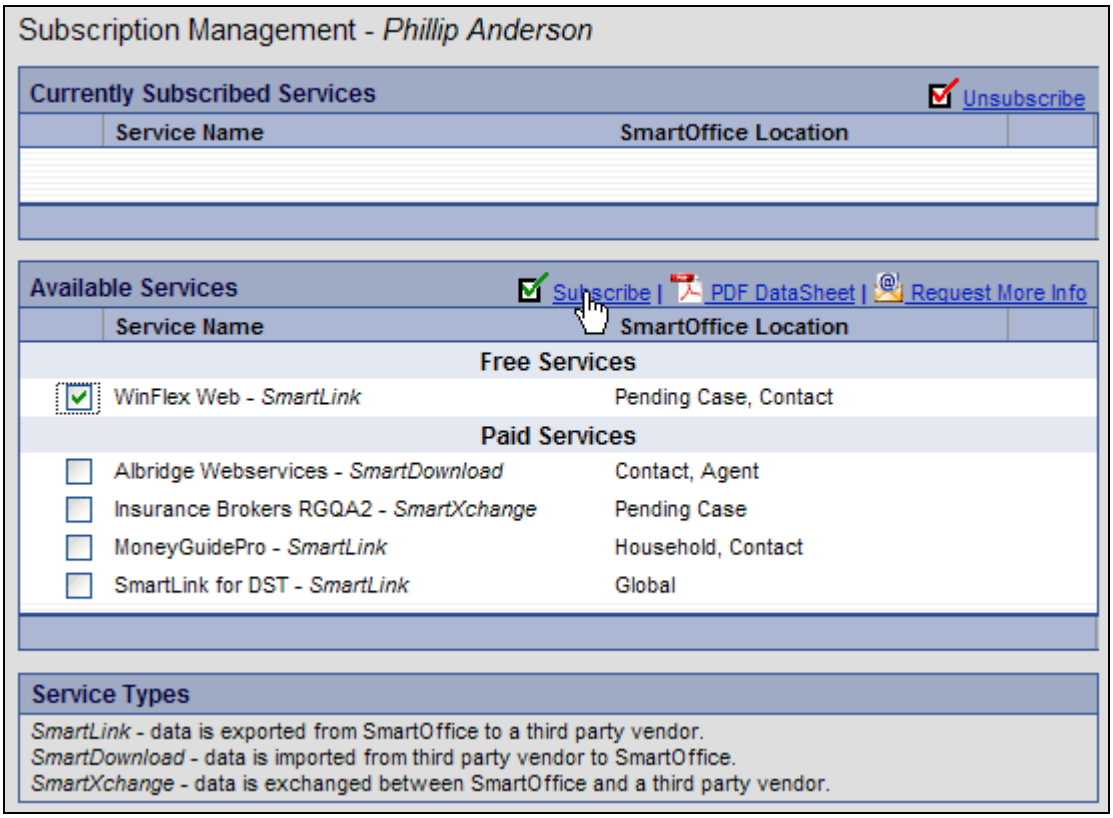
To subscribe to a free service (e.g., WinFlex Web – SmartLink):

1. From the Contact Summary or Detail tab, click the **DXO** button.
2. The services that have been subscribed to are listed in the **Services for [User Name]** dialog box. When no services have been subscribed to, the following message is displayed.

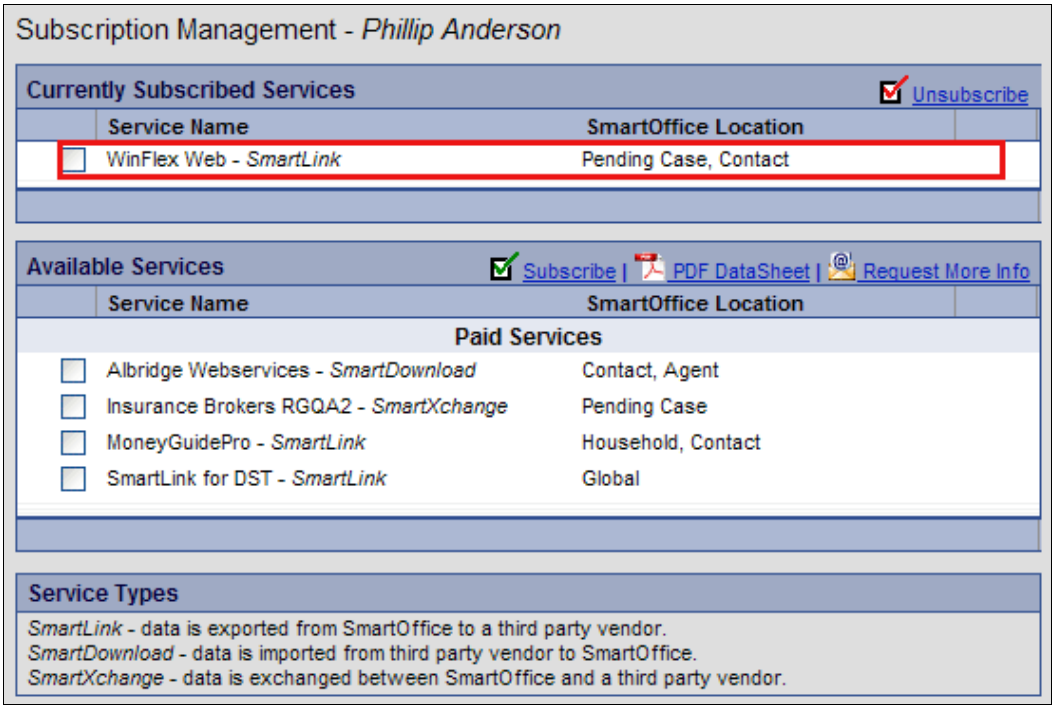


3. Click the **Edit Current/Add Free Services** hyperlink to open the Subscription Management dialog box.

4. Select the free service, such as the **WinFlex Web – SmartLink** option in the Available Services section and then click the **Subscribe** button.



5. The Subscription Management dialog box refreshes with free services (e.g., Winflex Web – SmartLink) added to the Currently Subscribed Services list.



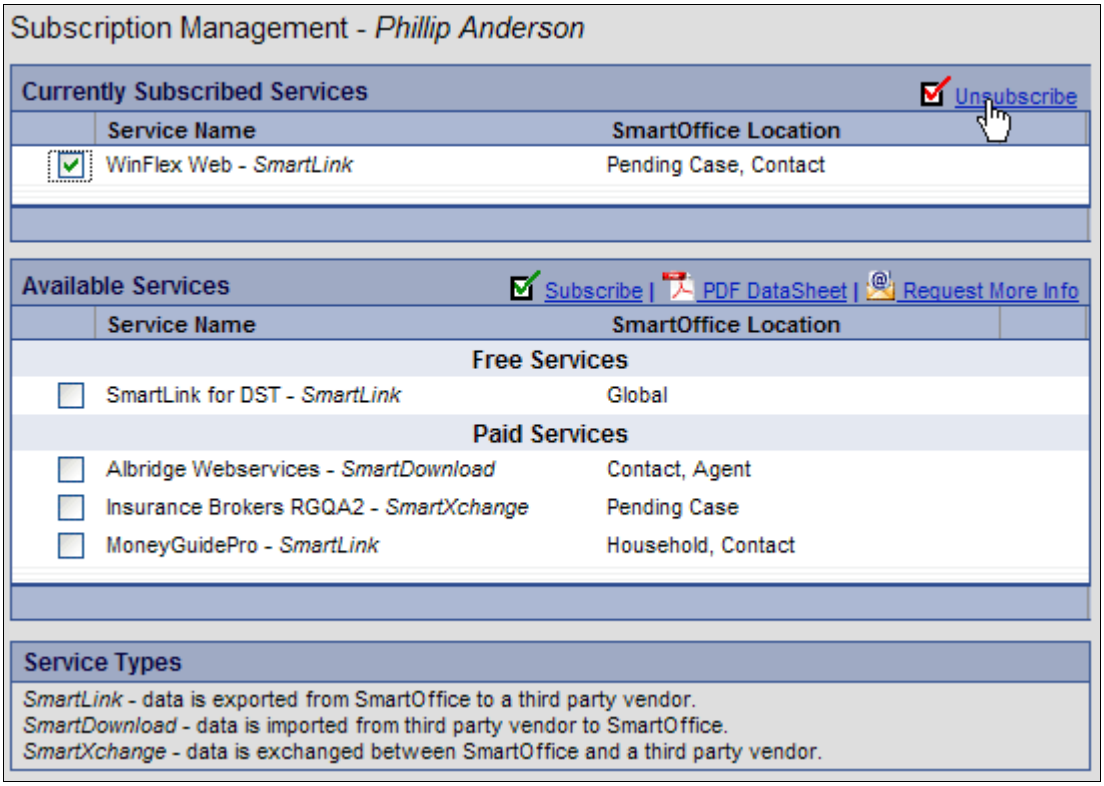
6. Close the Subscription Management dialog box; the **Services for [User Name]** dialog box, now displays the service (Winflex Web – SmartLink) on the Services list and the integration is ready for use.

Unsubscribing to Free Services

1. From the Contact Summary or Detail tab, click the **DXO** button.
2. The services that have been subscribed to are listed in the **Services for [User Name]** dialog box.

3. Click the **Edit Current/Add Free Services** hyperlink to open the Subscription Management dialog box.

4. From the Currently Subscribed Services section, select the free service (**WinFlex Web – SmartLink)** and then click the **Unsubscribe** button to remove the free service (Winflex Web – SmartLink) from the Currently Subscribed Services list.



5. Close the Subscription Management dialog box.

6. The **Services for [User Name]** dialog box refreshes with the free service (Winflex Web – SmartLink) removed from the list.