

Managing DataXchange Online
(DXO) Services
User Guide

SmartOffice[®]



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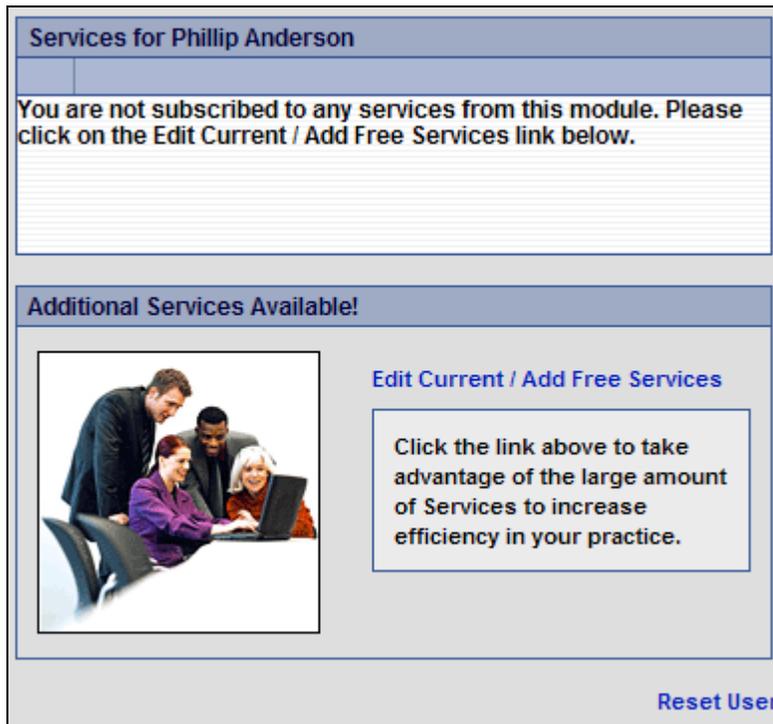
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Working with the Subscription Management Dialog Box

To access the Subscription Management dialog box:

1. This dialog box can be accessed by selecting one of two methods:
 - o From the Global Toolbar, click the **DXO** button.
 - o 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.

Subscription Management - Phillip Anderson

Currently Subscribed Services		<input checked="" type="checkbox"/> Unsubscribe User Guide Fast Class
	Service Name	SmartOffice Location
<input type="checkbox"/>	Albridge Webservices - <i>SmartDownload</i>	Contact, Agent
<input type="checkbox"/>	AllState - <i>SmartDownload</i>	Global
<input type="checkbox"/>	Jefferson Pilot - <i>SmartDownload</i>	Global
<input type="checkbox"/>	MoneyGuidePro - <i>SmartLink</i>	Household, Contact

Available Services		<input checked="" type="checkbox"/> Subscribe PDF DataSheet Request More Info
	Service Name	SmartOffice Location
Free Services		
<input type="checkbox"/>	Application Upload Prudential - <i>SmartLink</i>	Pending Case
<input type="checkbox"/>	Insurance Brokers Demo - <i>SmartXchange</i>	Pending Case
<input type="checkbox"/>	Licensing and Appointments - <i>SmartDownload</i>	Global
<input type="checkbox"/>	Mass Mutual PAAR - <i>SmartDownload</i>	Agent
<input type="checkbox"/>	Pershing - <i>SmartDownload</i>	Global
<input type="checkbox"/>	Raymond James - <i>SmartDownload</i>	Global
<input type="checkbox"/>	TD Waterhouse - <i>SmartDownload</i>	Global

Service Types
<i>SmartLink</i> - data is exported from SmartOffice to a third party vendor. <i>SmartDownload</i> - data is imported from third party vendor to SmartOffice. <i>SmartXchange</i> - data is exchanged between SmartOffice and a third party vendor.

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: <ul style="list-style-type: none">• 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.

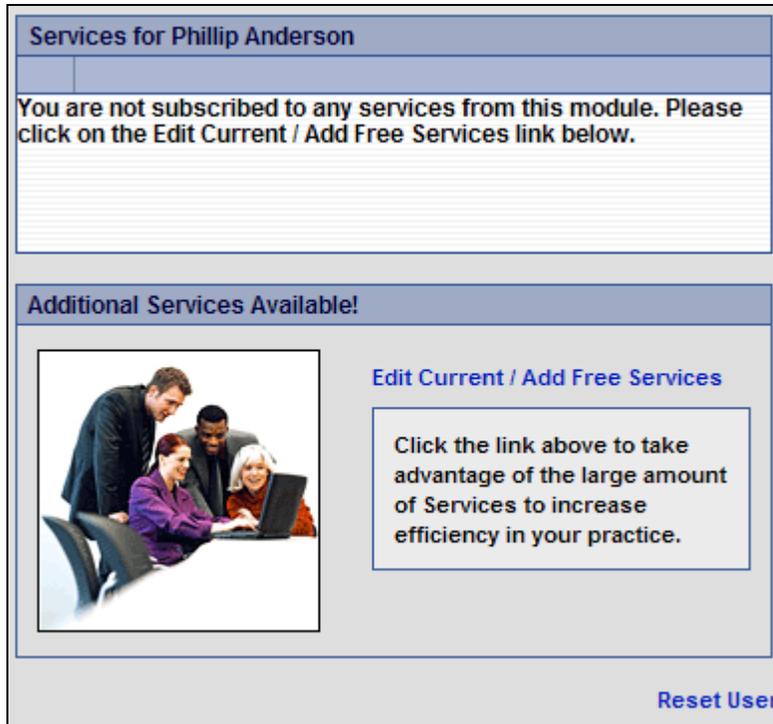
Available Services

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: <ul style="list-style-type: none"> • DXO button from the Global Toolbar
Free/Paid Services	Services are divided into two categories: <ul style="list-style-type: none"> • 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 <i>Subscribing to Free Services</i> 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.

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

Subscription Management - *Phillip Anderson*

Currently Subscribed Services		<input checked="" type="checkbox"/> Unsubscribe
Service Name	SmartOffice Location	

Available Services		<input checked="" type="checkbox"/> Subscribe PDF DataSheet Request More Info
Service Name	SmartOffice Location	
Free Services		
<input checked="" type="checkbox"/> WinFlex Web - <i>SmartLink</i>	Pending Case, Contact	
Paid Services		
<input type="checkbox"/> Albridge Webservices - <i>SmartDownload</i>	Contact, Agent	
<input type="checkbox"/> Insurance Brokers RGQA2 - <i>SmartXchange</i>	Pending Case	
<input type="checkbox"/> MoneyGuidePro - <i>SmartLink</i>	Household, Contact	
<input type="checkbox"/> SmartLink for DST - <i>SmartLink</i>	Global	

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<i>SmartLink</i> - data is exported from SmartOffice to a third party vendor.
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- The Subscription Management dialog box refreshes with free services (e.g., Winflex Web – SmartLink) added to the Currently Subscribed Services list.

Subscription Management - *Phillip Anderson*

Currently Subscribed Services		<input checked="" type="checkbox"/> Unsubscribe
Service Name	SmartOffice Location	
<input type="checkbox"/> WinFlex Web - <i>SmartLink</i>	Pending Case, Contact	

Available Services		<input checked="" type="checkbox"/> Subscribe PDF DataSheet Request More Info
Service Name	SmartOffice Location	
Paid Services		
<input type="checkbox"/> Albridge Webservices - <i>SmartDownload</i>	Contact, Agent	
<input type="checkbox"/> Insurance Brokers RGQA2 - <i>SmartXchange</i>	Pending Case	
<input type="checkbox"/> MoneyGuidePro - <i>SmartLink</i>	Household, Contact	
<input type="checkbox"/> SmartLink for DST - <i>SmartLink</i>	Global	

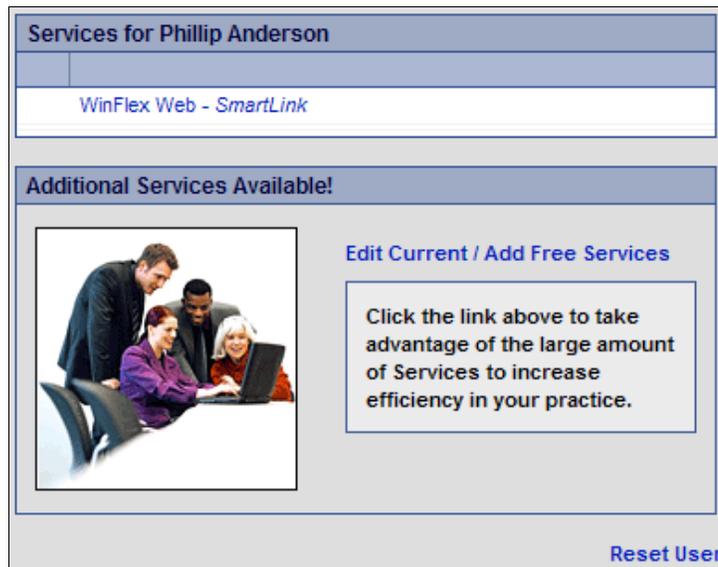
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6. Close the Subscription Management dialog box; the **Services for [User Name]** dialog box, now displays the service (Winflex Web – SmartLink) on the Services list and the integration is ready for use.



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.



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

Subscription Management - *Phillip Anderson*

Currently Subscribed Services		<input checked="" type="checkbox"/> Unsubscribe
<input checked="" type="checkbox"/>	Service Name	SmartOffice Location
<input checked="" type="checkbox"/>	WinFlex Web - <i>SmartLink</i>	Pending Case, Contact

Available Services		<input checked="" type="checkbox"/> Subscribe	PDF DataSheet	Request More Info
<input type="checkbox"/>	Service Name	SmartOffice Location		
Free Services				
<input type="checkbox"/>	SmartLink for DST - <i>SmartLink</i>	Global		
Paid Services				
<input type="checkbox"/>	Albridge Webservices - <i>SmartDownload</i>	Contact, Agent		
<input type="checkbox"/>	Insurance Brokers RGQA2 - <i>SmartXchange</i>	Pending Case		
<input type="checkbox"/>	MoneyGuidePro - <i>SmartLink</i>	Household, Contact		

Service Types
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- Close the Subscription Management dialog box.
- The **Services for [User Name]** dialog box refreshes with the free service (Winflex Web – SmartLink) removed from the list.