SmartLink for Financial Profiles+
User Guide

SmartOffice®

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Table of Contents

Introduction

This guide outlines the use of the Financial Profiles+ Professional Integration module for SmartOffice® version 5.1.3 and later. The integration of this application involves efficiently importing contact, investment, and policy data from SmartOffice to the Financial Profiles+ Professional software. This module is available as a separate add-on to SmartOffice. For information on purchasing the Financial Profiles+ Professional Integration module, contact the E-Z Data Sales Department at (800) 777-9188. For more information, visit www.ezdata.com. For more information on the Financial Profiles+ Professional application, visit www.profiles.com.

Requirements for the Financial Profiles+ Professional Integration

- Financial Profiles+ v8.0 or higher
- SmartOffice v5.1.3 or higher
- SmartInvestments license
- SmartPolicies license
- Rights to the Financial Profiles+ Professional integration

Setting Up Data in SmartOffice

In order to automatically populate the fields in Financial Profiles+ Professional, the data must be entered correctly in SmartOffice; otherwise, the data will be populated inconsistently for each contact record.

Data can be entered for the following:

- Client — Ensure that you have entered the client's demographics, employer, income, life insurance, disability insurance, and investments.
- Spouse — Ensure that you have entered the spouse's demographics, employer, income, life insurance, disability insurance, and investments.
- Dependents — Ensure that you have entered the dependent's demographics.

Linking a Contact to a Household

Before attempting to export data to Financial Profiles+ Professional, the contact record must be linked to a Household; otherwise, the data will not be exported properly.

To Link a Contact to a Household:

1. Open the Contact record and then select either the **Contact** or **Add'l Personal** tab.
2. Click the **Household** tab.
3. If a household does not exist, you will be prompted to either search for an existing household or create a new one.
   a. Click the **Add** button to create a new household record.
   b. Click the **Search** button to search for an existing household record.
4. If a household exists, the **Household** tab will display.
5. Ensure that the **This is the Primary Household of this Contact** option is selected.

Setting Up Financial Profiles+

It is highly recommended that the Financial Profiles+ icon be displayed on the Desktop in order to eliminate the number of steps required to open Financial Profiles+.

To Set up Financial Profiles+:

1. Open **Financial Profiles+**.
2. Click **Tools > Options** to open the Options dialog box.
3. Click the **Data Integrations** tab.
4. Select the **Enable SmartOffice Integration** option.

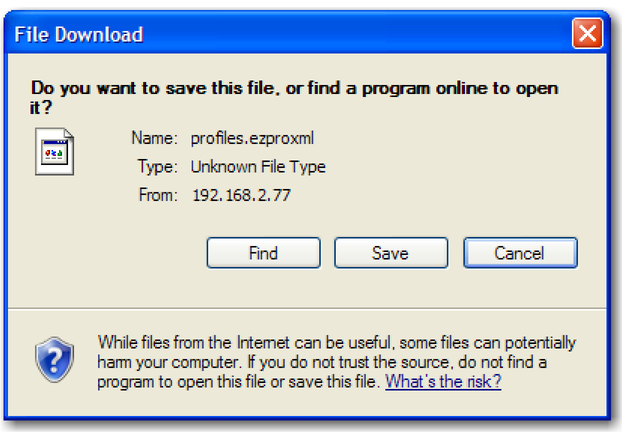
Using the Financial Profiles+ Professional Integration

Once all of the data is entered in SmartOffice and the Household record is linked to the Contact, export the data to Financial Profiles+ Professional to begin working on the client's financial plan.

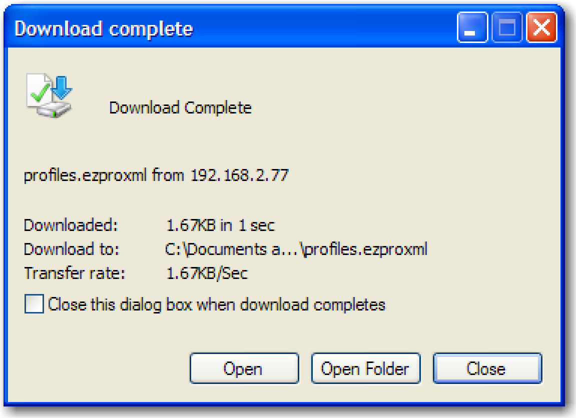
To Open Financial Profiles+ Professional from SmartOffice:

1. Find the appropriate Contact record and either:
   - Select the Contact from the Contact Summary.
   - Open the Contact record and then select either the **Contact** or **Add'l Personal** tab.
2. Click the **Financial Profiles+** button.
3. Click the **Save** button when prompted with the following dialog box. Once the file is saved, a dialog box will prompt to open the file.

   Tip: Save the file to the Desktop or a location that can be easily accessed.

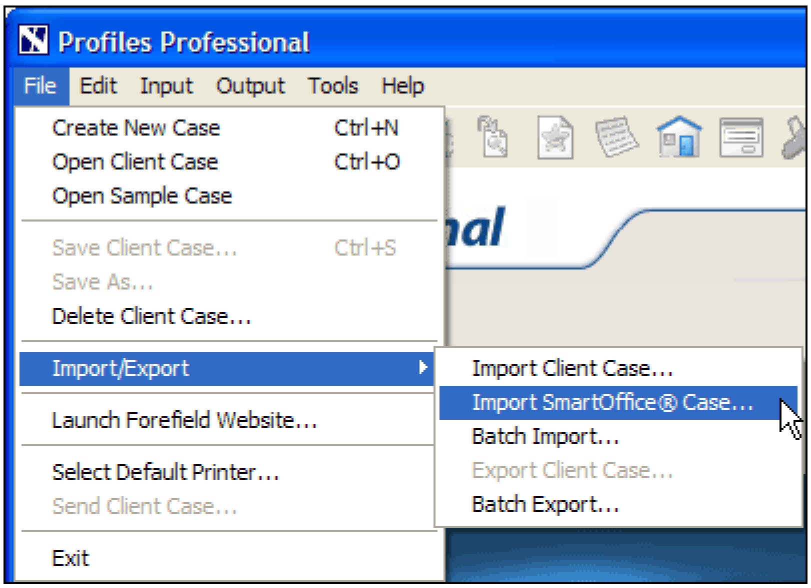


4. Click the **Open** button to open Financial Profiles+.



Note: If this prompt does not display, open Financial Profiles+ from the Start menu.

5. From Financial Profiles+, select **File > Import/Export > Import SmartOffice Case**.

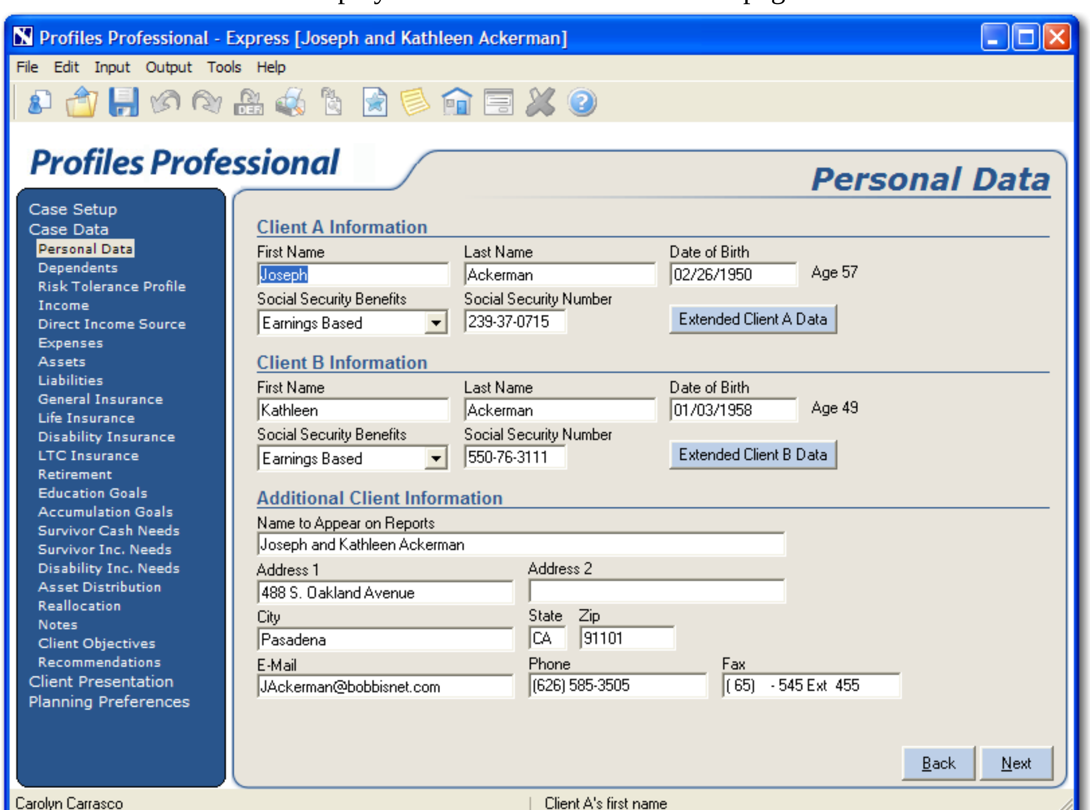


Note: If the Import SmartOffice Case option is grayed out, see *Setting Up Financial Profiles+* on page 2.

6. Locate the 'profiles.ezproxml' file that was saved previously.

7. If this is the first time importing the file, a prompt will display to assign the asset type for each account.

8. Click the **Close** button to display the Financial Profiles+ home page.



9. The client’s data will be exported to the following sections within Financial Profiles+ Professional.
Tip: Click the **View Summary Data** button to display a Summary of the data.

Name of Hyperlink	Description
Personal Data	Provides demographic information regarding the selected contact and his/her spouse
Dependents	Provides demographic information regarding dependents
Income	Provides Annual Income for the selected contact and spouse
Assets	Provides access to the selected contact and spouse’s investments
Life Insurance	Provides access to the selected contact and spouse’s insurance policies
Disability Insurance	Provides access to the selected contact and spouse’s disability insurance policies, if any
LTC Insurance	Provides access to the selected contact and spouse’s long-term care insurance policies, if any