SmartLink for WinFlex Web
User Guide

SmartOffice®

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Introduction

This guide outlines the use of the WinFlex Web Integration for SmartOffice® version 5.1.3 and later. The integration of this application involves exporting data from SmartOffice to the WinFlex Web illustration software, saving time running illustrations with client data. This module is available as a separate add-on to SmartOffice. For information on obtaining SmartLink for WinFlex Web, please contact E-Z Data's Sales Department at (800) 777-9188. For more information, visit www.ezdata.com. For more information on the WinFlex Web application, visit www.ebixlife.com.

Requirements for the WinFlex Web Integration

- WinFlex Web 1.61.08 or later
- SmartOffice 5.1.3 Winter Release or later
- SmartLink for WinFlex Web can be run on SmartOffice Spring Release 1 (Build 5809) and up. There also is a patch ready for SmartOffice Winter Release (Build 5587) that will also enable WinFlex support. The current version of WinFlex Web cannot be run on SmartOffice Fall Release or earlier.
- Subscribing to SmartLink for WinFlex Web
- Access to the Proposal Tracking tab
- Right to create carriers and products
- Adobe Acrobat Reader to review PDF reports
- Add the following URLs as part of your trusted sites

    1. Select **Internet Options** from the expanded **Tools** menu.
    2. Click the **Security** tab and then select the **Trusted Sites** option from the Web content zone.
    3. With the **Trusted Sites** icon selected, click the **Sites** button.
    4. Add the following to your trusted sites.
        - SmartOffice URL
        - *.ez-data.com
        - *.winflexweb.com

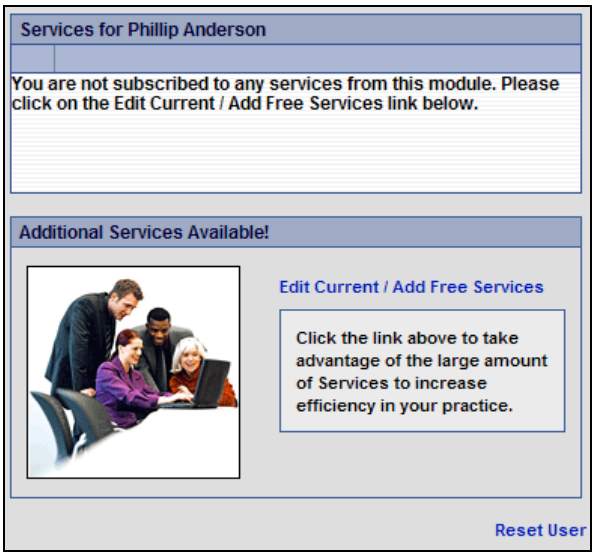
> **Note:** Clear the **Require Server Verification (https) for All Sites in this Zone** option to add ***.ez-data.com*** and ***.winflexweb.com*** to the list of trusted sites. Click the **OK** button to exit the Trusted Sites dialog box.

5. With the **Trusted Sites** icon still selected, click the **Custom Level** button.
6. Select **Low** from the Reset To drop-down list and then click the **Reset** button.
7. Click the **OK** button when prompted with the warning message.
8. Click the **OK** button to exit the Internet Options dialog box.

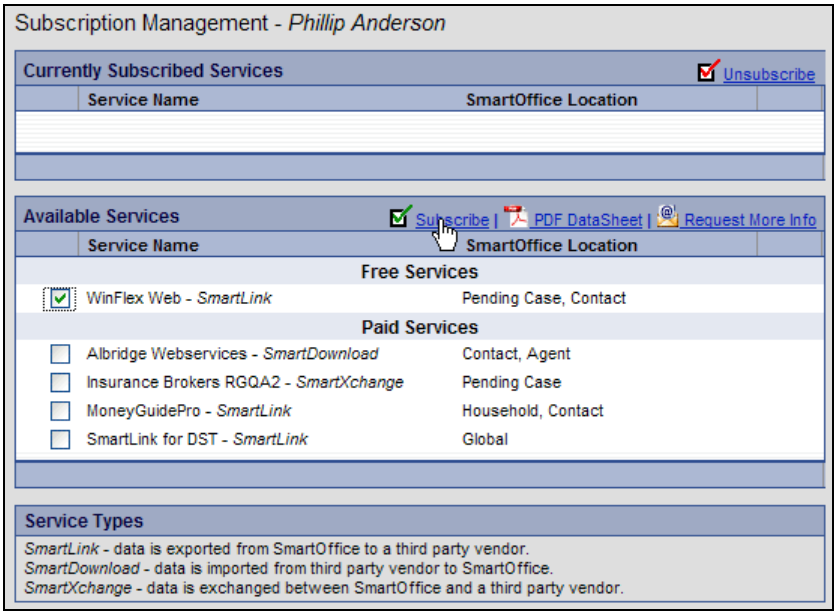
- Pop-up Blockers must be turned off.

Subscribing to WinFlex Web – SmartLink

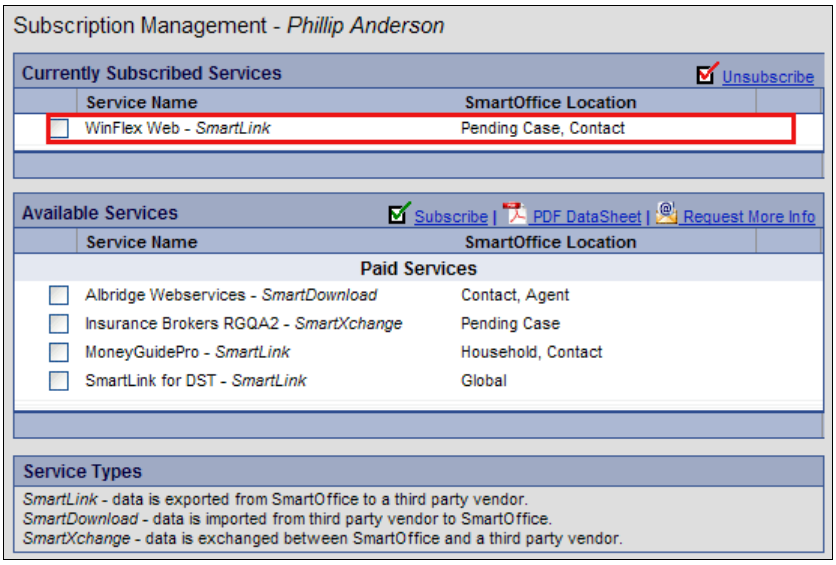
1. From an open contact or pending case record, select the **DXO** button.
2. The services that have been subscribed to are listed in the **Services for [User Name]** dialog box. When no services have been subscribed to, the following message is displayed.



3. Click the **Edit Current/Add Free Services** hyperlink to open the Subscription Management dialog box.
4. Select th**e WinFlex Web – SmartLink optio**n in the Available Services section and then click the **Subscribe** button.



5. The Subscription Management dialog box refreshes with 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 Winflex Web – SmartLink on the Services list and the integration is ready for use.

Setting up SmartOffice

In order to begin running illustrations directly from SmartOffice, verify the following:

- The client contact records have their demographic data entered in SmartOffice. See *Setting up Data in SmartOffice* on page 5.
- The advisor record has your information entered in SmartOffice. See *Setting up Data in SmartOffice* on page 5.
- The Pending Case record has the mandatory fields entered. See *Setting up Data in SmartOffice* on page 5.

Setting up Data in SmartOffice

In order to automatically enter the information in the fields in WinFlex Web, the data must be entered correctly in SmartOffice; otherwise, the illustrations will be entered inconsistently for each contact record.

Data can be entered for the following:

- **Client:** Main contact used for the illustration.
- **Primary advisor of the client**: Agent's information to be included in the illustration.
- **Primary insured of the pending case**: Main contact used for the application.
- **Primary advisor of the pending case**: Agent's information to be included in the illustration.

The table below details the fields to populate in SmartOffice in order to be automatically populated in WinFlex Web.

Table 1: Contact Fields

SmartOffice Fields	Comments	WinFlex Web
Contact (P) tab		**Insured tab**
First Name		Insured Name
Last Name		Insured Name
Birth Date		Date of Birth
Age		Age
Gender		Sex
State	Make certain to select the **Primary Residence Address** option.	State Code

Table 2: Advisor Fields

SmartOffice Fields	Comments	WinFlex Web
Personal tab		**Agent Info tab**
First Name		Agent Name
Last Name		Agent Name
Agency		Agent Company
Primary Business Address		

SmartOffice Fields	Comments	WinFlex Web
Address Block	Make certain to select the **Primary Business Address** option.	Agent Address1
Additional Line - 2		Agent Address2
Additional Line - 3		Agent Address3
City		Agent City
State		Agent State
ZIP Code		Agent Zip Code
Primary Business Phone Number	Make certain to select the **Primary Business Phone** option.	Agent Phone
Primary Business Phone Extension		
Business Fax Number	The first business fax number entered will be the one used by WinFlex Web.	Agent Fax
Preferred E-mail Address	Make certain to select the **Preferred** option.	Agent Email

Working with WinFlex Web

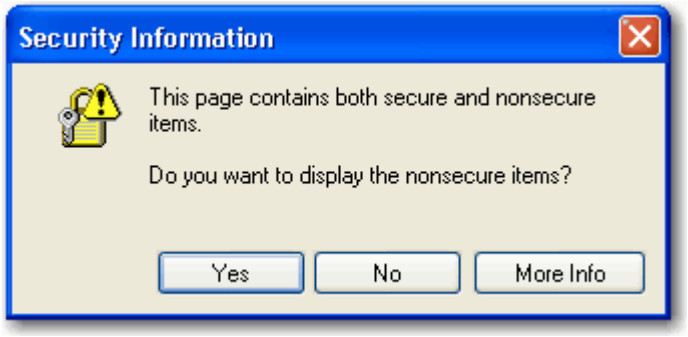
Once all of the data is entered in the appropriate fields in SmartOffice, illustrations can be run.

To Open WinFlex Web from SmartOffice

1. Find the appropriate contact record and either:
   - Select the contact from the Individual Contact Summary.
   - Open the contact record.
2. Or, find the appropriate pending case record and either:
   - Select the pending case from the Pending Case Summary.
   - Open the pending case record.
3. Click the **DXO** button from the contact/pending case toolbar. Note that if the DXO dialog box does not display, make sure to hold the **CTRL** key + the **DXO** button. This is because the pop-up blocker is turned on; the blocker will not allow the DXO dialog box to open.
4. From the **Service for [User Name]** dialog box, select **WinFlex Web - SmartLink**.

> **Note:** If WinFlex Web does not open within a few seconds, make sure to hold the **CTRL** key + **SmartLink for WinFlex Web**.

5. The following message displays stating that the page that is about to open (WinFlex Web) contains both secure and nonsecure information. Click the **Yes** button to open WinFlex Web.



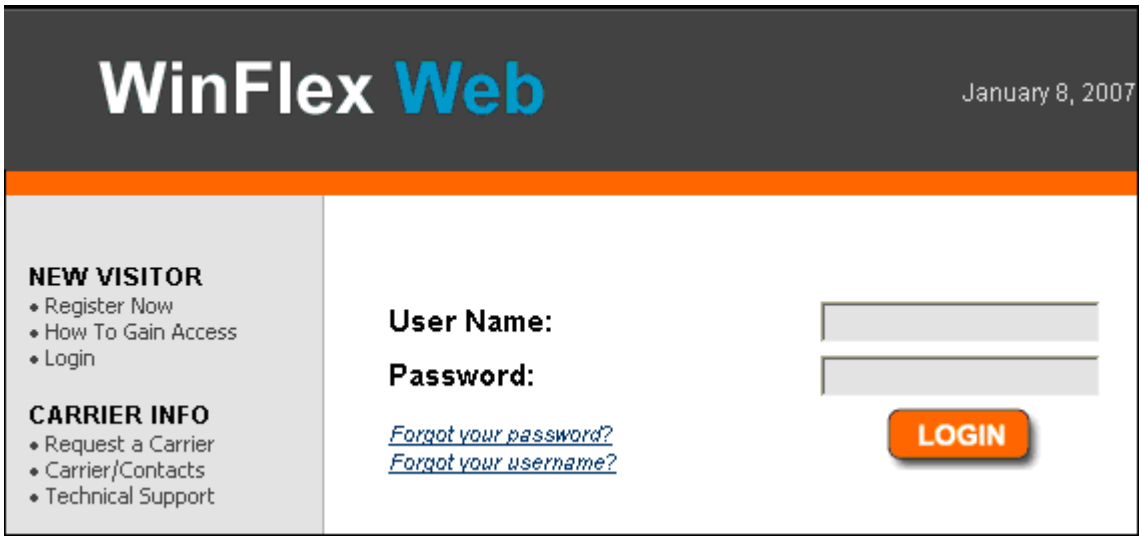
> **Note:** If this is your first time accessing WinFlex Web from SmartOffice, a white screen will display for a few minutes until authentication is complete. Accessing WinFlex Web will be much faster once the first authentication is complete.

6. If this is the first time using WinFlex Web from SmartOffice, a prompt will display to log in to or register for WinFlex Web.

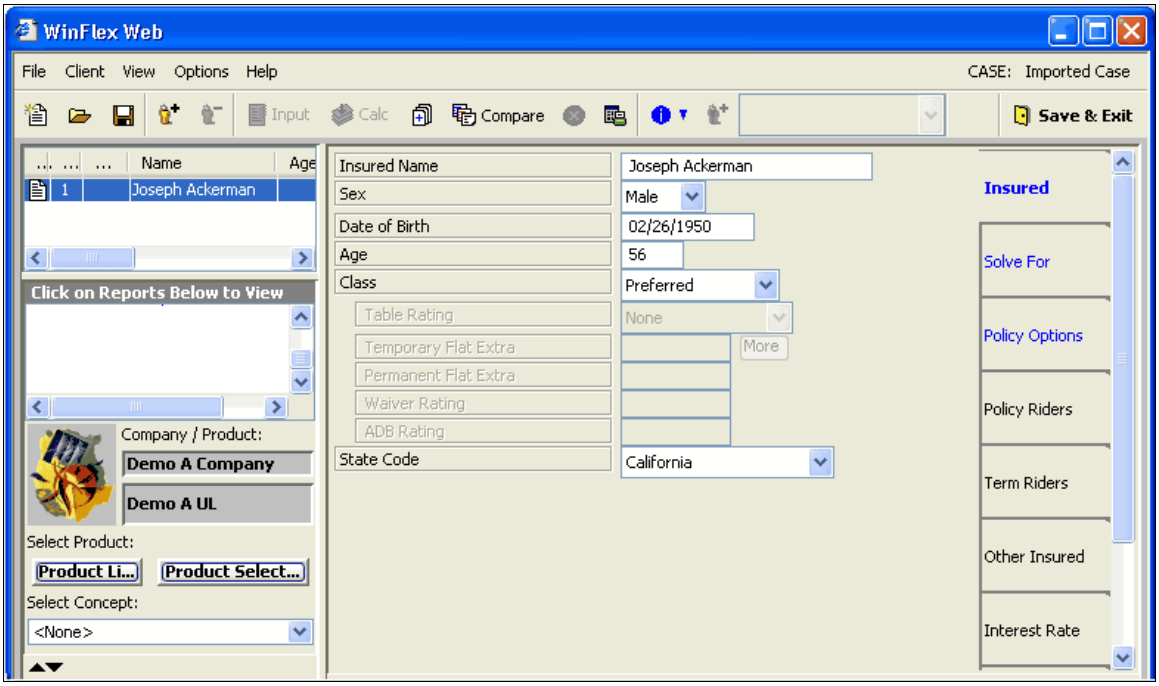
   - With a login to WinFlex Web, enter the existing User Name and Password and then click the **Login** button.

> **Note:** There is a limited amount of time to enter the login credentials.

   - If not yet registered but the login information has been received, click the **Register Now** option from the **New Visitor** menu.



7. WinFlex Web will open with the selected advisor and contact records' information already entered on the appropriate tabs.



8. Enter the remaining information to complete the illustration process.

9. Generate the illustration as usual in WinFlex Web.

Saving Illustrations to SmartOffice

Once the illustration in WinFlex Web has been completed, the illustration can be saved directly to SmartOffice.

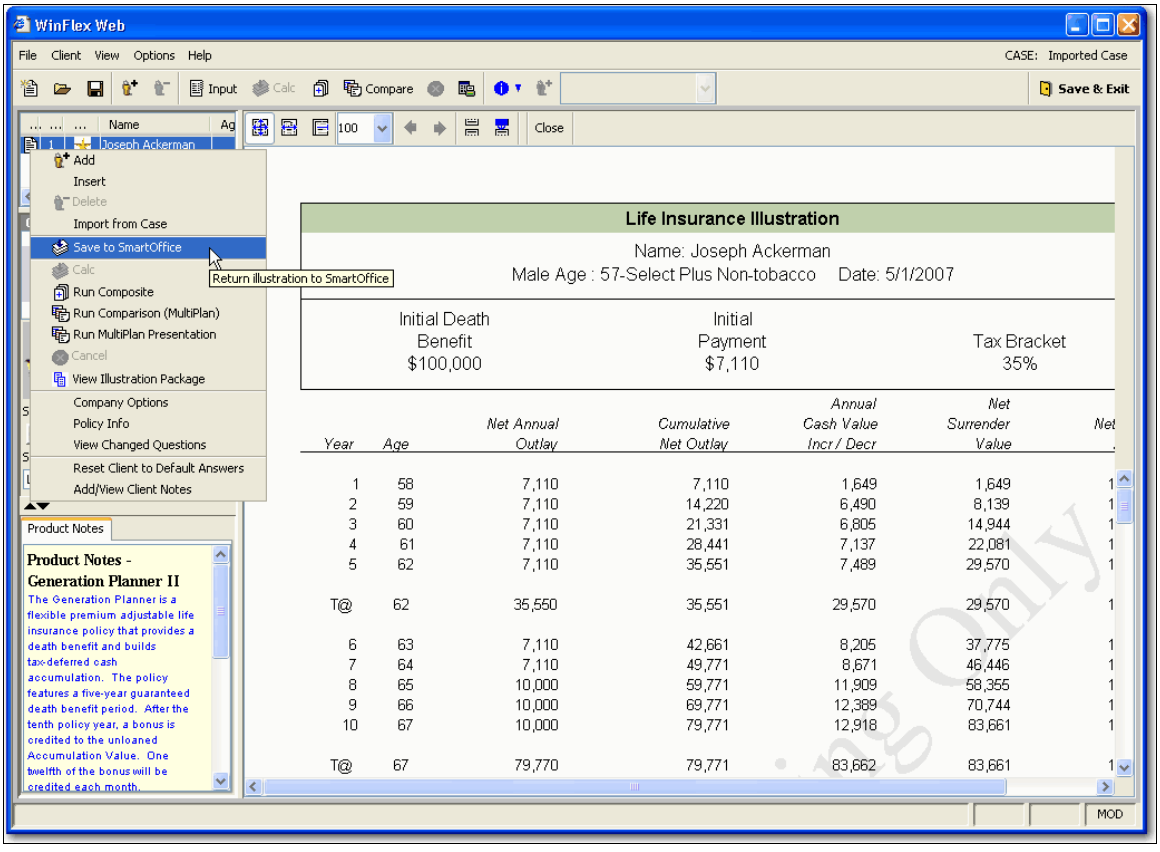
Once the illustration is generated, a **Save to SmartOffice** option is available from the client's expanded right-click menu. Selecting this option will automatically:

- Create a proposal for the contact record in SmartOffice.
- Add an illustration to the proposal and attach the illustration file in PDF format.

> **Note:** One or more illustrations can be created in SmartOffice to support the number of illustrations created for the contact record.

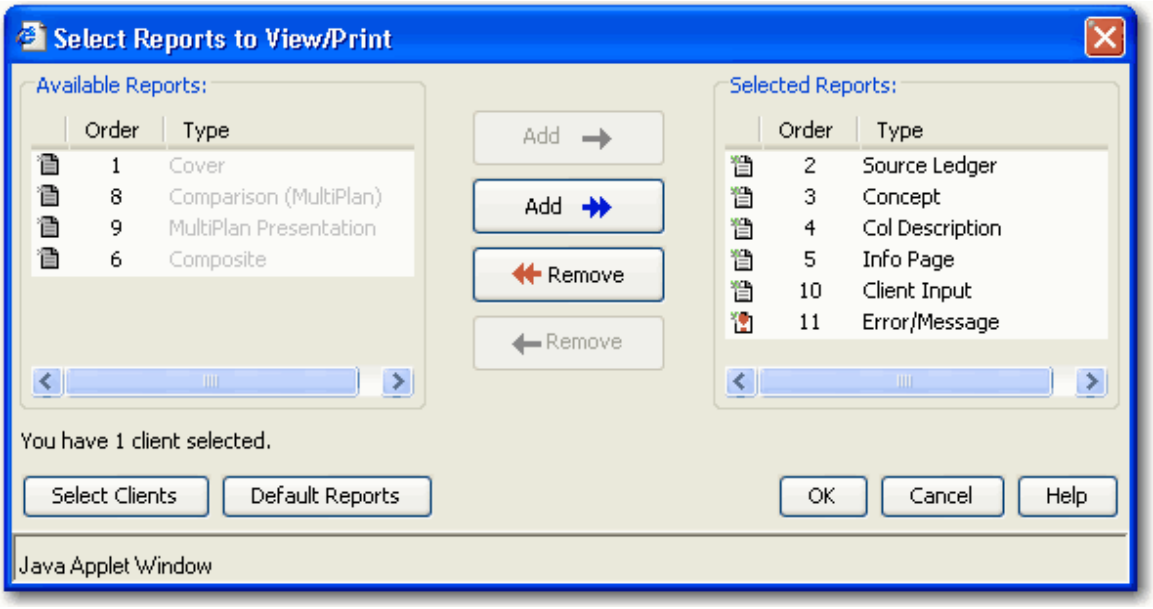
To Save an Illustration to SmartOffice

1. Select the client or clients from the Client List.
2. Right-click a client to open the context menu as shown below.



3. Select the **Save to SmartOffice** option.

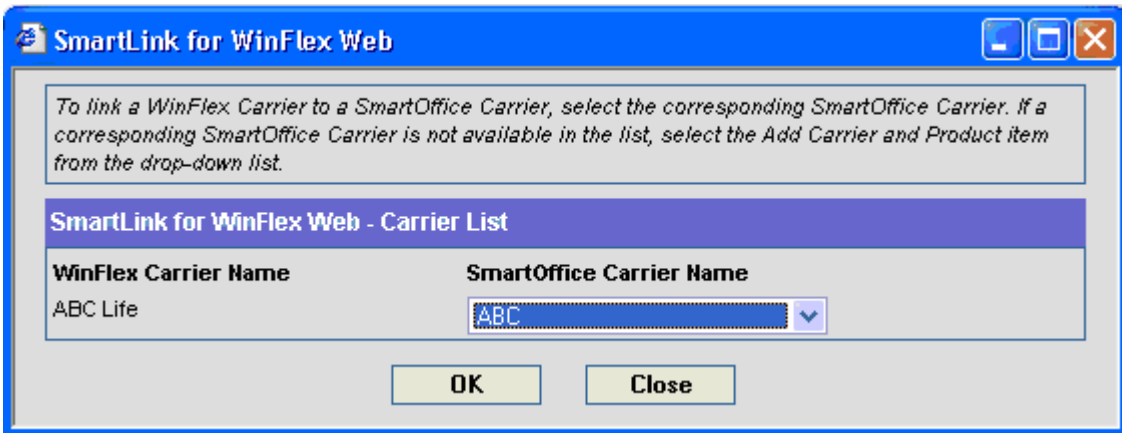
4. Select the appropriate reports to generate and then click the **OK** button to begin generating the illustration.



5. When the selected carrier in WinFlex Web cannot be mapped to a carrier in SmartOffice, the user is prompted to select a carrier.

6. Select the carrier from the SmartOffice Carrier Name drop-down list.

> **Tip:** If the carrier does not exist, select the **Add Carrier and Product** option. The record is automatically created based on the information provided by WinFlex Web.



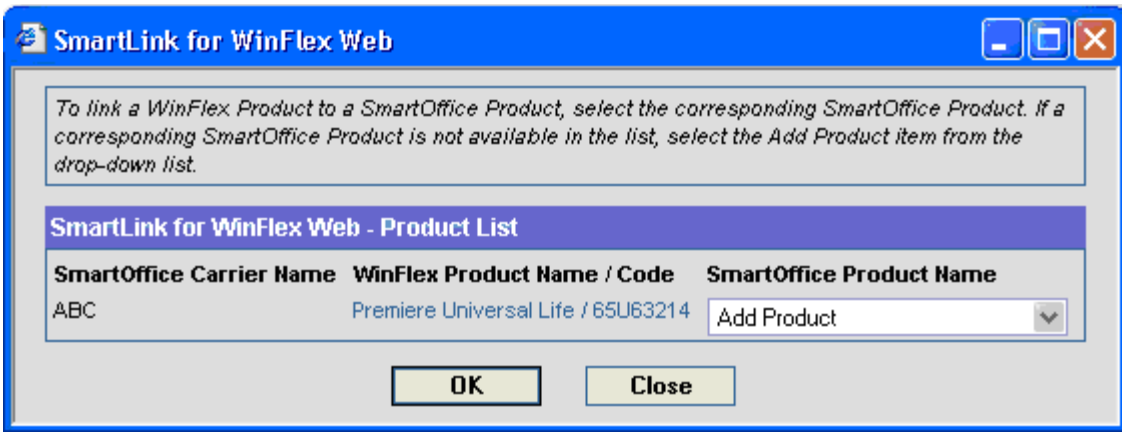
7. Click the **OK** button. A Confirmation prompt will display to ensure that the selected carrier is correct. The reason for this confirmation is that the mapping in SmartOffice cannot be changed if it is incorrect.

8. From the Confirmation prompt:
   - Click the **OK** button if the mapping is correct.
   - Click the **Cancel** button to return to the carrier mapping section to review and if necessary, make the appropriate changes.

   If the **OK** button was selected, the Product List will display in order to select the corresponding product. The list will be filtered based on the selected SmartOffice carrier.

9. Select the product from the SmartOffice Product Name drop-down list.

> **Tip:** If the product does not exist, select the **Add Carrier and Product** option. It will be automatically created based on the information provided by WinFlex Web.



10. Click the **OK** button. A Confirmation prompt will display to ensure that the selected carrier is correct. The mapping cannot be changed in SmartOffice if it is incorrect.

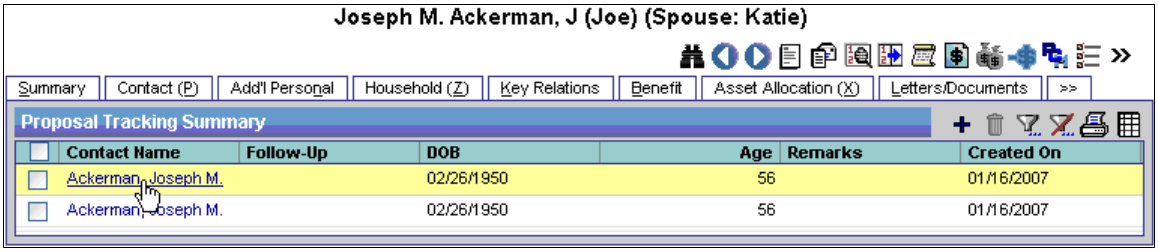
11. From the Confirmation prompt:
    - Click the **OK** button if the mapping is correct.
    - Click the **Cancel** button to go back to the product mapping section to review and if necessary, make the appropriate changes.

    Click the **OK** button to create a proposal and the appropriate number of illustrations for the selected contact record. Each illustration will also have the illustration document attached accordingly.

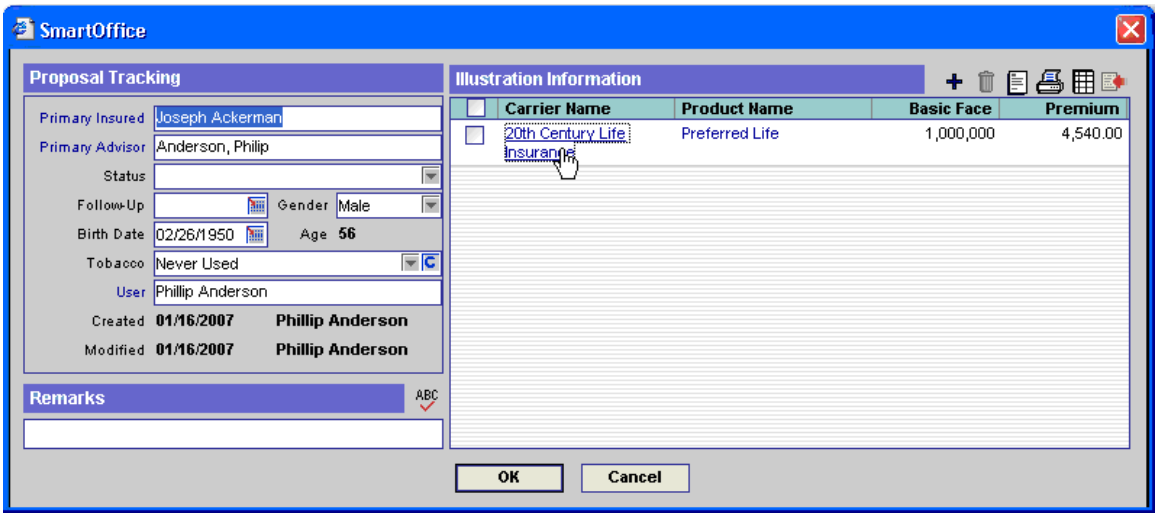
> **Note:** The prompt will only display if the WinFlex carrier has not yet been mapped to a carrier in SmartOffice. Once the carrier is mapped, the prompt will not display again.

12. The respective proposal and illustration or illustrations will be created for the selected contact record and their primary advisor, or, the primary insured and their primary advisor of the selected pending case. Select the **Proposal Tracking** tab to view the proposals for the selected contact.

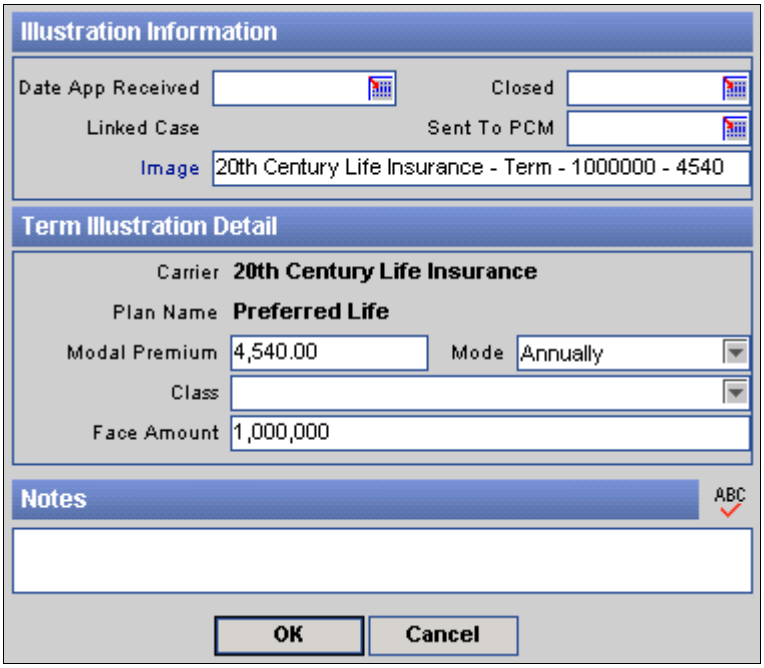
> **Note:** If the tab does not display, select the arrows (>>) next to the very last tab and from the drop-down list, select **Proposal Tracking**.



13. Click a first column hyperlink, to display the proposal.



14. From the Illustration Information section, click the first column hyperlink to display the illustration.

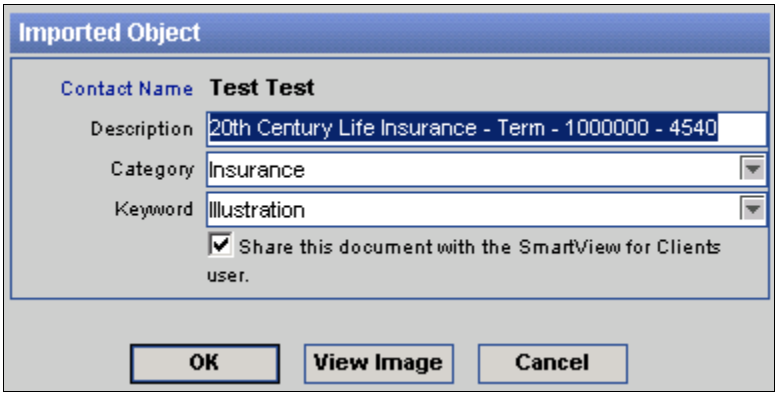


15. Ensure that the name of the image is set to the following format:

    Carrier Name – Type – Face Amount – Modal Premium.

16. Click the **Image** hyperlink to open the illustration document.

17. From the Imported Object dialog box, ensure that the Keyword field is set to **Illustration**.



18. Click the **View Image** button to open the illustration document in Adobe Reader.

19. The File Download dialog box opens with the following options:

    - **Open**: Opens the illustration in Adobe Reader.
    - **Save**: Saves the file to the specified directory on the computer.
    - **Cancel**: Cancels the process.