

SmartFulfillment  
User Guide

# SmartOffice<sup>®</sup>



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## Introduction

The SmartFulfillment module automates the process of tracking the requests made by the users of SmartOffice®. The tracking process begins when a new Fulfillment Request is added. The SmartFulfillment module maintains each stage of the fulfillment, from the request made until the request is fulfilled. The following are some key SmartFulfillment features:

- Inventory – View the total number of items that can be requested.
- Fulfillment By Request – View the number of fulfillment requests made by the user.
- Fulfillment By Items – View the number of requested items made by the user.
- Create follow-up activities for users.
- Send out appropriate letters for each request.
- Track the history of what items were sent and the cost spent for each item per contact record.
- Generate reports as Dynamic Reports™ or Microsoft Excel spreadsheets.

## User Types in SmartFulfillment

There are two user type options for SmartFulfillment module users – Fulfillment Administrator and the Show Fulfillment Option.

### Creating Users

To create a Fulfillment Administrator and Show Fulfillment Options user, the following roles must be activated.

#### Fulfillment Administrator

User Management – User Name - User Roles/Licenses tab.

- From User Roles, select **Base SmartOffice**.
- From Module/Licenses, select **Fulfillment Administrator** and **Show Fulfillment Option**.

User Management – User Name - Detail tab.

- User Type: **Wholesaler/Producer**.

#### Show Fulfillment Option Only

User Management – User Name - User Roles/Licenses tab.

- From User Roles, select **Base SmartOffice**.
- From Module/Licenses, select **Show Fulfillment Option**.

User Management – User Name - Detail tab.

- User Type: **Wholesaler/Producer**.

## SmartFulfillment Administrative View

The menu for the Fulfillment Administrative User is shown below.



- **Inventory** - Display the Inventory Summary.
- **Fulfillment By Request** – Display the total number of Fulfillment Requests in the Fulfillment Summary.
- **Fulfillment By Items** – Display the total number of Requested Items in the Item Summary.

## Inventory

From the side menu, click **Fulfillment Center** and then select **Inventory** from the expanded menu to open the Inventory Summary.

### Summary

The Inventory Summary displays the items of different available categories. The Summary tab displays an overview of the Inventory records. Red text indicates that the items are either Not Available or Expired.

Status:  Inventory Summary

<input type="checkbox"/>	Category	Item	Code	Package Size	Price per Package
<input type="checkbox"/>	Promotional Material	Flash Light	2222	1	20.00
<input type="checkbox"/>	Promotional Material	Pen	2345	25	10.00
<input type="checkbox"/>	Promotional Material	Polo T-Shirt	1234	1	25.00
<input type="checkbox"/>	Brochure	Seminar Package	23985	10	35.00
<input type="checkbox"/>	Brochure	Term Life Products Brochure	12345	25	11.50
<input type="checkbox"/>	Brochure	Variable Annuity Product Brochure	9999	25	17.95
<input type="checkbox"/>	Brochure	Variable Life Product Brochure	6666	25	21.25

Records Shown: 7    Total Records: 7

## Inventory Summary Toolbar Buttons

- **Search** - To Search the Inventory, click the **Search** button.
- **Add** - Click this button to add a new Inventory. When the Inventory Detail dialog box opens, add all appropriate details and then click the **Save** button to save the Inventory.

The screenshot shows the 'Inventory Detail' dialog box in SmartOffice. It contains the following fields and options:

- Inventory Detail:**
  - Fulfillment Category: dropdown menu
  - Name: text box
  - Code: text box
  - Expires On: text box with calendar icon
  - Package Size: text box (value: 1)
  - Items per Package: text box
  - Price per Package: text box
  - Not Available: checkbox
- Fulfillment Options:**
  - Fulfillment Queue: dropdown menu
  - Fulfillment Cover Letter: text box
  - Create Follow-up Activity After: text box (value: Business Days)
  - Follow-up Option: dropdown menu (value: Fulfillment User)
- Description:** large text area with an 'ABC' icon and a red checkmark.

Buttons: OK, Cancel

- **Delete Record(s)** – Delete the existing inventory items that are not linked to any Fulfillment Request.
- **Filter Records** – The function of this button is to display only those records that fulfill a filter condition.
- **Unfilter Records** – Click this button to remove the currently applied filter.
- **Print Spreadsheet** – This is used to print the Inventory Item records displayed in the spreadsheet.
- **Customize Spreadsheet Layout** – This button enables the user to modify the layout of the spreadsheet by adding/removing columns, changing the sorting option, etc.
- **Tag All Option** - To perform an activity for all displayed records, select this option to select all records without having to tag each individually. Click the option again to clear the selection.

**Note:** Inventory marked as Not Available after the user request is made will not be processed.

## Adding Inventory

1. From the side menu, click **Fulfillment Center** and then select **Inventory** from the expanded menu to open the Inventory Summary.
2. Click the **Add** button to display the Inventory Detail dialog box.

The screenshot shows the 'Inventory Detail' dialog box in SmartOffice. It is divided into three main sections: 'Inventory Detail', 'Fulfillment Options', and 'Description'.  
1. **Inventory Detail**: Contains fields for 'Fulfillment Category' (a dropdown menu), 'Name', 'Code', 'Expires On' (with a calendar icon), 'Package Size' (input field with '1'), 'Items per Package', 'Price per Package', and a 'Not Available' checkbox.  
2. **Fulfillment Options**: Contains 'Fulfillment Queue' (dropdown), 'Fulfillment Cover Letter', 'Create Follow-Up Activity After' (input field with 'Business Days'), and 'Follow-up Option' (dropdown with 'Fulfillment User').  
3. **Description**: A large text area for entering details, with a small 'ABC' icon and a red checkmark to its right.  
At the bottom of the dialog are 'OK' and 'Cancel' buttons.

### Inventory Section (Available in edit mode)

- **Fulfillment Category:** The category field indicates the category of the inventory item. For example, select **Brochure** to add an Inventory of Brochure category. Additional categories can be added if required.
- **Name:** This field indicates the name of the inventory item.
- **Code:** This field indicates the code of the inventory item.
- **Expires On:** This field indicates the date after which the inventory item will no longer be available for the users to request.
- **Not Available:** This option indicates that the particular Inventory Item is not available. If the Inventory Item is not available, select this option.

### Fulfillment Options Section (Available in edit mode)

- **Fulfillment Queue:** This field specifies the queue through which the particular inventory item is to be processed.
- **Fulfillment Cover Letter:** This field indicates the letter to send upon Fulfillment/Decline of the inventory item request.
- **Create Follow-Up Activity After:** This field specifies the number of days after which the follow-up is created for a Fulfillment/Decline of the inventory item request.



- **Follow-up Option:** This is a choice field with these options:
  - Fulfillment Users.
  - Fulfillment Admin Users.
  - Fulfillment User + Fulfillment Admin Users.
  - Fulfillment User + User Assigned to Contact and User Assigned to Contact.
 This field specifies the User Participant for a follow-up activity. Select the appropriate option for which the activity is to be created.

## Fulfillment By Request

From the side menu, click **Fulfillment Center** and then select **Fulfillment By Request** from the expanded menu to open the Fulfillment Summary.

### Summary

This Summary displays the list of fulfillment requests and is used to fulfill, decline or delete those requests.

**Fulfillment Summary**

Status:  Fulfillment Queue:   Show my Requests

Contact Name	Items Requested	Status	Requested On	Fulfilled By
<input type="checkbox"/> Alfred, Jerry	Pen - 10 Variable Life Product Brochure - 100	Requested	03/23/2005	
<input type="checkbox"/> Adams, Mark	Polo T-Shirt - 4 Variable Life Product Brochure - 3 Seminar Package - 3	Partial Fulfillment	03/24/2005	
<input type="checkbox"/> Able, Christian Adam	Variable Life Product Brochure - 1	Request Fulfilled	01/19/2006	Chris Bartlett
<input type="checkbox"/> Able, Christian Adam	Term Life Product Brochure - 1 Variable Life Product Brochure - 1	Request Fulfilled	01/19/2006	Chris Bartlett
<input type="checkbox"/> 20th Century Life Insurance	Polo T-Shirt - 1	Request Fulfilled	01/30/2006	Mark Paladian
<input type="checkbox"/> 20th Century Life Insurance	Variable Life Product Brochure - 1	Requested	01/30/2006	

Records Shown: 35 Total Records: 35

### Fulfillment Summary Toolbar Buttons

- **Fulfill Tagged Request** – This is used to fulfill the Fulfillment Requests that are of the Requested Status.
- **Decline Tagged Request(s)** – This is used to decline any Fulfillment Requests that are of the Requested Status.
- **Search** – This opens the Search Inventory dialog box to search for Inventory records.
- **Delete Record(s)** – Delete the existing inventory items that are not linked to any Fulfillment Request.
- **Filter Records** – The function of this button is to display only those records that fulfill a filter condition.
- **Unfilter Records** – Click this button to remove the currently applied filter.
- **Mass Correspondence** – To send letters to all selected records, click the **Mass Correspondence** button to open the Letter Printing Options dialog box.
- **Print Spreadsheet** – This is used to print the Inventory Item records displayed in the spreadsheet.
- **Customize Spreadsheet Layout** – This button enables the user to modify the layout of the spreadsheet by adding/removing columns, changing the sorting options, etc.

- **Tag All Option** - To perform an activity for all displayed records, select this option to select all records without having to tag each individually. Click the option again to clear the selection.

## Fulfillment – By Items

From the side menu, click **Fulfillment Center** and then select **Fulfillment By Items** from the expanded menu to open the Item Summary.

### Summary

The Summary lists all of the requested items and then fulfills or declines those items. A request can be partially fulfilled if some of the items in the request are not available in the inventory. Upon fulfilling or declining a material request, a letter is sent to the contact record which includes an inventory of items that are being shipped.

Item Summary						
Status	Not Fulfilled	Fulfillment Queue	All			
<input type="checkbox"/>	Item	Code	Price per Package	Quantity	Fulfilled	Item Cost
<input type="checkbox"/>	Polo T-Shirt	1234	25.00	5	Not Fulfilled	125.00
<input type="checkbox"/>	Variable Annuity Product Brochure	9999	17.95	1	Not Fulfilled	17.95
<input type="checkbox"/>	Variable Life Product Brochure	6666	21.25	1	Not Fulfilled	21.25
<b>Total</b>						<b>164.20</b>
Records Shown: 3 Total Records: 3						

### Item Summary Toolbar Buttons

- **Mark Item Fulfilled** – Fulfills the Fulfillment Requests that are of the Requested Status.
- **Decline Item** – Declines any Fulfillment Requests that are of the Requested Status.
- **Search** – The Search Inventory dialog box opens to search for Inventory records.
- **Filter Records** – The function of this button is to display only those records that fulfill a filter condition.
- **Unfilter Records** – Click this button to remove the currently applied filter.
- **Print Spreadsheet** – This is used to print the Inventory Item records displayed in the spreadsheet.
- **Customize Spreadsheet Layout** – This button enables the user to modify the layout of the spreadsheet by adding/removing columns, changing the sorting options, etc.
- **Tag All Option** - To perform an activity for all displayed records, select this option to select all records without having to tag each individually. Click the option again to clear the selection.

## Show Fulfillment Option Only View

This option facilitates the adding and viewing of Fulfillment Requests. The requests can only be fulfilled or declined by a Fulfillment Administrator user.

### Adding a Fulfillment Request

Fulfillment requests can be added in two ways:

- Using the Fulfillment Request button.
- From the Fulfillment tab.

## Using the Fulfillment Request Button:

The fulfillment request can be added from any of the contact tabs. To add a fulfillment request:

1. Click the **Fulfillment Request** button from the global toolbar.

Category(s)	Requested Item(s)	Quantity

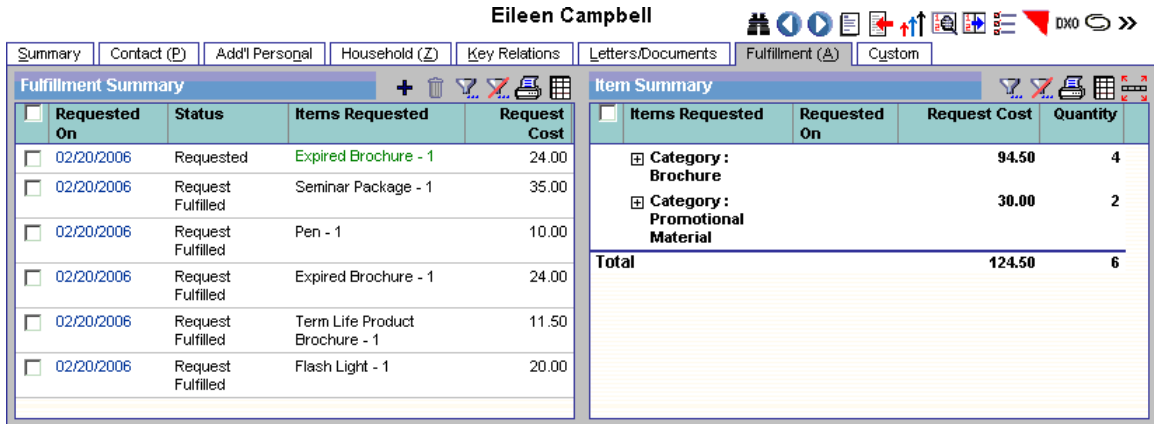
2. A dialog box opens for adding the fulfillment request with the following sections:
  - **Contact Request Fulfillment Information** (Read-only section): This section contains the Contact/Distributor Name and Preferred Address. The user can select different addresses by clicking the **Select Different Address** button. If no addresses are present for the Contact/Distributor, a new address can be added and selected using the **Select Different Address** button.
  - **Requested By and On:** This contains the logged in user name and the current date.
  - **Handling Option:** This is a drop-down field listing the following choices:
    - Regular Mail
    - Ground
    - Third Day
    - Second Day
    - OvernightNote that additional choices can also be added.
3. Specify the Handling Option.
4. The Fulfillment Queue field displays the fulfillment center's name (if any).
5. The Category(s), Requested Item(s) and Quantity columns contain drop-down fields and depending upon the Category field, the rest of the drop-down fields are populated. The Requested Item field drop-down will be populated with only those items that fall under the selected category.
6. Select a Requested Item from the drop-down list. When selected, the Quantity field is populated with a default value of "1".
7. Specify the quantity as necessary.

- Enter any applicable additional information in the Enter Comments to be Included in the Cover Letter and Handling Instructions sections.
- Click the **OK** button. The newly added Fulfillment Request is saved and is displayed on the Fulfillment Tab of the Contact/Distributor.

**From the Fulfillment Tab:**

To add a Fulfillment Request from the Fulfillment tab:

- Select any Contact/Distributor and then click the **Fulfillments** tab.



- The Fulfillment tab opens to display the Fulfillment Summary and Item Summary section.
- Click the **Add** button from the Fulfillment Summary section to open a dialog box for adding fulfillment requests.
- Repeat Steps 2-8 in the Using the Fulfillment Request Button section to display the newly added Items Requested names in green.

**Fulfilling Fulfillment Requests**

The users having Fulfillment Administrator rights can only fulfill Fulfillment Requests. The Fulfillment Requests can be fulfilled in two ways:

- With the Fulfillment By Request option.
- With the Fulfillment By Items option.

**From Fulfillment By Requests:**

To fulfill requests using the Fulfillment By Requests option:

- From the side menu, click **Fulfillment Center** and then select **Fulfillment By Request** from the expanded menu to open the Fulfillment Summary.
- Select a fulfillment request with a Status of Requested and then click the **Fulfill Tagged Request** button from the global toolbar.
- When Generic Letter processing starts, a Generic Fulfillment Letter is sent to the fulfilled Contact and the request status is then changed to Request Fulfilled. To send an Item-specific letter, the item must be fulfilled using the Fulfillment By Items method.

**Note:**

- If any of the items from the list of items present in a Fulfillment Request is either “Not Available” or “Expired” then the status will change to “Partial Fulfillment.”

- If an item present in a Fulfillment Request is either “Not Available” or “Expired” then that particular Fulfillment Request will not be fulfilled and the following message will display. “None of the requested items are available at this time. This request cannot be fulfilled.”

#### **From Fulfillment By Items:**

To fulfill the items using the Fulfillment By Items option:

1. From the side menu, click **Fulfillment Center** and then select **Fulfillment By Items** from the expanded menu to open the Item Summary.
2. Select any item request with a Status of “Not Fulfilled” and then click the **Mark Item Fulfilled** button from the global toolbar.
3. The tagged item request will be fulfilled and a letter will be sent to the fulfilled contact if the item has a specific letter associated with it. The status of the Item Request is then changed to “Fulfilled.”

**Note:** If an item present in the Item Summary is “Not Available” or “Expired” then that particular Item Request will not be fulfilled and the following message will display. “None of the requested items are available at this time. This request cannot be fulfilled.”