Summary of Changes
v6 Build 2325 to v7 Build 2730
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Summary of Changes from SmartOffice® v6 Build 2325 to v7 Build 2730
Welcome to SmartOffice 7!

This latest release of SmartOffice includes significant improvements to help you deliver even better service to your clients and improve productivity across your practice. The latest enhancements include:

- **Performance improvements** that make SmartOffice faster than ever. While performance efficiencies have been made throughout the application, the two most notable areas of improvement are increased speeds of sign-in and mass mailings.

- **New Home Page features** that put the information you want most right at your fingertips — immediately upon sign-in. When adding a tab, the new “themes” option provides a variety of pre-configured setups, making it easier to configure the new workflow and reduce the time it takes to get down to business.

While the most significant improvements are found in these two areas, notable enhancements have been made in nearly every area of the system and are detailed within this document. While no training is needed to benefit from these improvements, taking a few minutes to review the changes will prepare you to make the most of what SmartOffice 7 has to offer and may even provide you with some new ways to use SmartOffice to improve your practice.

**Don’t miss the SmartOffice 7 webinars!**

To help you get acquainted with the features and benefits of SmartOffice 7, E-Z Data is offering a webinar series just for current users. Watch for your webinar invitation, or view the webinar recording — available within the SmartOffice Help System — at your convenience.

We hope you find SmartOffice 7 better, quicker and easier to use than ever before.

Build 2730 of SmartOffice 7 contains changes made from March 2009 to July 2009.

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**Note regarding text changes in SmartOffice:** This release of SmartOffice may contain changes to text in dialog boxes and other areas of the SmartOffice user interface. Changes of this type are typically made to correct spelling, grammar, punctuation and other language-related issues. Such changes normally are not listed in this document unless they affect the way SmartOffice works.
**Changes to Default Settings**

Note: This new section of the Summary of Changes alerts users to changes in default settings that may alter existing workflows, reports and other areas of the system that are affected by changes to settings.

- **Option to display/hide SmartOffice Utilities:** A new user right controls whether a SmartOffice user can download and install SmartOffice Utilities. The new Disable SmartOffice Utilities user right hides the SmartOffice Utilities hyperlink normally available through Setup > Installations. This user right is selected by default for SmartView for Advisors users. These users have an alternative component, SmartOffice Export, available specifically for them. SmartView for Advisors users are prompted to download and install this component when they try to print or preview lists or spreadsheets.

- **New product FE Commissionable default setting:** When the user adds a new insurance product, the system now looks at the carrier’s Flat Extra Commissionable setting (located on the carrier’s PCM Options content link) and applies the same setting to the new product by default. For products, the FE Commissionable option is located on the Product Settings content link.
Enhancement Highlights

This section briefly lists the major enhancements in this release of SmartOffice. This section is not a complete listing of all modules and enhancements. For complete information about these and other changes, refer to Detailed Listing of Changes beginning on page 7.

Core System

A major improvement in the core system is the introduction of home page themes — collections of home page features that users can select to instantly fill their SmartOffice home pages with reports, news and other data critical to their businesses. For details about home page themes, see page 7.

Other core system highlights in this release include:

- Office Favorites
- List grouping enhancements
- SmartPad quick search
- Contact deletion with holdings

A detailed list of all Core System changes begins on page 7.

SmartCalendar

- Activity report improvements and printing options
- Option to restrict activity creation to self
- Faster method for adding participants to an activity
- Marker indicating current time in calendar views
- Reschedule Activity button on Activity Search Results list
- Ability to change activity type colors from calendar views
- Activity reassignment improvements
- New Status drop-down list for task lists

A detailed list of all SmartCalendar changes begins on page 24.
PDF Reports

- PDF report packages
- Automatic report delivery to SmartView for Clients users
- Layout changes in report selection dialog box
- Option to save settings when running reports

A detailed list of all PDF Reports changes begins on page 27.

Advisor/Agency

- SmartView for Advisors list printing

A detailed list of all Advisor/Agency changes begins on page 34.

SmartCaseManager

- SmartView for Advisors with Case Status
- Underwriting guideline notes
- Enhanced rider assignment

A detailed list of all SmartCaseManager changes begins on page 34.

SmartBenefits

- Document list for group products separate from group policies
- Introduction of group product notes for better record-keeping
- Improved and expanded Dynamic Reports

A detailed list of all SmartBenefits changes begins on page 39.

SmartCommissions

- New SmartCommissions for Advisor module
- New Options banding on the rate file
- Simplified method for updating the rate file

A detailed list of all SmartCommissions changes begins on page 40.
SmartInvestments

- Investment Alerts and Dashboards refinements
- SmartView for Clients enhancements

A detailed list of all SmartInvestments changes begins on page 45.

SmartOpportunities

- Automatic opening of activity creation dialog box on stage change
- Notification about event invitees
- Automatic stage change upon action completion
- Calendar activity action updates
- Stage change for multiple opportunities from different processes
- SmartPad record of deleted opportunities
- Import/export of opportunity process definitions
- Expanded ability to change primary owner
- Ability to change primary owner during opportunity creation
- Ability to add contacts to opportunities during contact creation
- Search options saved on Global Opportunity List

A detailed list of all SmartOpportunities changes begins on page 53.

SmartRecruiting

- Direct candidate import

A detailed list of all SmartRecruiting changes begins on page 66.

SmartOffice Sync for Outlook/Lotus Notes

- Improved ease of use

A detailed list of all SmartOffice Sync changes begins on page 67.

QuickSync for Outlook/Lotus Notes

- Support for Lotus Notes

A detailed list of all QuickSync changes begins on page 67.
SmartOffice Utilities

SmartMail for Outlook/Lotus Notes

- Contact creation during posting
- Multiple e-mail message posting
- Multiple e-mail posting workflows

A detailed list of all SmartOffice Utilities changes begins on page 68.
Detailed Listing of Changes

Core System

Enhancements

General

- **Home page themes**: Server administrators can now help users begin to understand and benefit from the SmartOffice home page by creating pre-packaged sets of home page features, or “themes,” for users. To create a theme, the administrator adds features to a home page tab and then selects the **Create theme from this tab** option from the tab menu.

The Manage Themes dialog box then opens, displaying the new theme (Financial News, in this example). In addition to administrator-created themes, the dialog box contains themes created by E-Z Data.
To use the new theme, a user creates a new home page tab by clicking the plus (+) tab.

The Create a New Tab dialog box displays, enabling the user to select the ready-made theme.
A new tab that displays the contents of the selected theme is then added to the user’s home page.
• **Office Favorites**: Office administrators can now add favorites for sets, filters, letters and Dynamic Reports to the Favorites lists of all users in the office. While viewing a list of sets, filters, letters or Dynamic Reports, the administrator can access the new Add to Office Favorites (All Users) option from the expanded Menu list.

![Menu with Add to Office Favorites option](image1)

• **List grouping enhancements**: Grouping options for lists have been refined to display multiple groupings in a more space-efficient manner. Previously, when the user customized a list using grouping options, multiple groupings displayed on separate lines. Now, multiple groupings display on a single line.

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<thead>
<tr>
<th>20th Century Life Insurance (Carrier Name)</th>
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<tbody>
<tr>
<td>Life (Holding Type)</td>
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</table>

<table>
<thead>
<tr>
<th>20th Century Life Insurance  Carrier Name</th>
<th>Life  Holding Type</th>
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</table>

![List with revised grouping](image2)
• **Faster sign-in**: To improve sign-in speed, the SmartOffice sign-in process has been streamlined through optimization of certain screens and data.

• **Favorite users list**: Users who frequently assign, view data for, or otherwise interact with specific users in the office can now create a list of favorite users. The list makes selecting users faster than browsing through all users in the office. Anytime the Available Users dialog box displays, the user can select the **Show My Favorite Users List** option from the **View** drop-down list.

![Available Users from Office](image)

To create a list of favorite users, the user navigates to the Basic Info content link in User Preferences and adds user to the My Favorite User List section.

![User Preferences](image)
Contact Management

- **Contact deletion with holdings**: To help users efficiently remove records related to a deleted contact, SmartOffice now deletes a contact’s policies, investments and households when the contact is deleted.

- **Default communication preference for new contacts**: To save users time when they create contacts, an office-level option has been added to specify the default communication preference for new contacts. The Preferred Communication Default options are available on the SmartPad/New Contact/E-mail Posting content link in Office Settings.

- **Privacy enhancements**: Documents, letters, e-mail messages and e-mail attachments that are posted to SmartOffice and marked private are now also marked private in the SmartPad. Private records also display in a different color in the SmartPad list to clearly indicate their status.

- **More phone number types for business records**: Three new phone number types are now available for business phone records: Mobile, Pager (beeper) and Modem/data line.

**Correspondence**

- **New confirmation letter user preference**: Adjustments have been made to the workflow for sending activity confirmation letters. The user now has additional options under **Setup > User Preferences > Activity Options > Activity Confirmation Letter Settings**.

This new section gives the user greater control over whether the letters are printed or sent by e-mail by default (the default setting is for SmartOffice to ask every time). The user can also choose to disable confirmation letters entirely.
• **New e-mail address/e-mail privacy dialog box**: When the user tries to compose an e-mail message to a contact who has no e-mail address or who has e-mail privacy enabled, the system now displays a dialog box from which the user can make appropriate changes. The dialog box saves the user the extra mouse clicks involved in accessing the contact record through normal means to make changes.

![Image of new e-mail address/e-mail privacy dialog box]

• **Option to print letters from Word**: For form letters that may not print from SmartOffice the way they are displayed in Word’s Print Preview, the option **Print using Microsoft Office Word** was introduced. This option is available when the user saves form letter changes back to SmartOffice.

• **E-mail communication enhancements**: This new feature enables users to more easily maintain the continuity of e-mail communications in the system. When a message is sent from SmartOffice, a code is now automatically added to the subject line. When the recipient replies to the message, the code enables SmartOffice to recognize the relevant SmartOffice contacts and post the message to the SmartPad. This eliminates the need for the user to search for and select the appropriate contacts for posting.

**Filters**

• **New system filter syntax**: Improvements to the dialog box for creating and editing filters make the process more intuitive for users. Filter criteria now read like sentences and follow a more logical progression.

![Image of filter criteria]

• **Filter list improvements**: To speed up the loading time of the Filter List when the user performs a search for all filters in the system, the list is now sorted by filter name by default.
Dynamic Reports

**Dynamic Reports for alerts:** Users can now create reports based on alerts that have been sent. A new Alert Center option is now available from the Report Category drop-down list when the user searches for or creates Dynamic Reports.

![Dynamic Reports Image]

Framework

- **Faster editing of dates:** The date picker dialog box that displays when the user edits any date field in SmartOffice has been enhanced to save the user time and mouse clicks. The dialog box now closes by itself after the user makes changes that require no more than a single click.

- **Redesigned Quick Action Corner:** The Quick Action Corner and alert icons now have an updated look. In addition, a new menu that displays when the user right-clicks those icons provides the user with several time-saving calendar display and alert options.

![Framework Image]
• **Letter privatization enhancement (corporate customers only):** An option was added to config.xml to enable corporate customers who are not using Record Privatization to mark letters as private. This change protects contacts from being accidentally privatized from the rest of the users in the system. This change does not apply to retail SmartOffice users.

• **Option to limit contact search conditions:** A new option was added to config.xml and the SmartOffice Configuration Tool to enable or disable additional search conditions (Business, Advisor) when the user searches for a contact by last name, first name.

• **Information card enhancements:** The information card that displays when the user positions the mouse pointer over a contact or business in a list has been enhanced. It now displays more detailed information:
  - Last SmartPad entry (memo date, memo time, notes, created by)
  - Last activity (activity date, start time, type, subject, description)
  - Total premium and total assets
  - Information for some calendar items
  - Counts for the following:
    - Letters sent
    - Activities/tasks
    - SmartPad entries
    - Policies
    - Pending cases
    - Opportunities
    - Accounts
    - Positions
    - Key relations

**Home Page**

**Home page theme import and export enhancements:** When home page themes containing Dynamic Report portlets are exported, they now retain complete filter definitions. In addition, filter creation logic was built in to SmartOffice to handle definition imports of themes containing Dynamic Report portlets.
SmartPad

SmartPad quick search: Users can quickly search recent SmartPad notes using a new option in the Search section drop-down list that looks for text in SmartPad notes created within the last 30 days.

Solutions

General

- User interface issues involving improper alignment and fonts were resolved.
- Improvements were made to the way in which the Mark Private feature works with contacts, letters and documents. The changes do not alter existing functionality.
- The Employer field was renamed “Company” throughout the system to conform to industry standards.
- Adjustments were made to dialog box handling for Internet Explorer as part of an effort to support multiple versions of Internet Explorer.
- Users who do not have a contact record associated with their user accounts are now prompted at sign-in to select or create a contact record. This resolves issues with user merge codes not working properly.
- An issue was resolved in which the See Data For function did not have an option to view a specific user’s data when Super User was enabled for the user. This logic was modified to enable all users to choose which user they would like to see data for.
- An issue with Excel export was resolved. The SmartPad entry that is posted when data is exported was being posted multiple times.
- An issue was resolved in which closing the Unsuccessful Login Attempts dialog box was not clearing failed sign-in attempts. This caused the dialog box to display again during the next sign-in, even when the correct sign-in information was entered.
• Several user interface and stability issues were resolved:
  o In the time zone selection dialog box, some time zone options were displayed in the wrong order.
  o In *Office Settings > Default User Preferences*, the Data Aggregation Service option on the Login Events content link was labeled incorrectly.
  o If the user selected *Mass Correspondence* from the expanded *Sales & Marketing* menu and the system prompted the user to upgrade SmartOffice Download Manager, clicking the *OK* button caused a script error.
  o When a newly added SmartPad entry was marked Private, the SmartPad still displayed the entry as not being private.
  o On the Letters/Documents content link, the Open icon and Keyword column did not display when letters and documents were viewed together in a single list.
  o A decimal point displayed in the Letter Sent column.
  o A script error occurred when the Description field of a filter was maximized.

• Issues in the following two areas were resolved:
  o Copying and pasting text in the Remarks field of an address was not working properly.
  o Adding letters from lists that have correspondence options available was not working properly.

**Contact Management**

• When a user adds a company to a contact and then saves the changes, the Update Contact Information dialog box now enables the user to specify whether the company’s address should be the contact’s preferred address, primary business address or both. The two options are selected by default.

![Update Contact Information](image)

• Changes were made to contact merge to handle situations in Enterprise View in which items were not merged properly.

• An issue with exporting a contact list that has a Yes/No option on the list was resolved. Such items were being exported with a “1” or “0” instead of a “Yes” or “No.”
• Contact list sorting issues were resolved. There were reports of sorting not working properly with basic columns.

• An issue was resolved in which Child-type key relations were not displaying in the Family Information section on the contact Detail content link. The family information section now display types for Son, Daughter, Step-Son, Step-Daughter and Child.

• An issue in which filtering was causing duplicate Total/Subtotal information to display on the Contact List was resolved.

• Pressing the TAB key to navigate to a drop-down list now sets the focus on the drop-down list. This enables the user to select an option from the list using the arrow keys.

• An issue with the display of phone numbers in the information card was resolved. The information card, which displays when the user positions the mouse pointer over a contact record, was displaying incorrect phone numbers for some contacts when viewed from the Contact List or the Calendar Agenda.

• An issue with record merge for duplicate contacts was resolved. If three or more contacts were duplicates, not all records were merging properly.

• A formatting issue with phone numbers was resolved.

• An “insert/update” error that occurred when the user uploaded Excel templates was resolved.

• An error that occurred when the user ran the duplicate contact report was resolved.

• An issue was resolved with offices that have a default area code. When a new phone number was added with an area code other than the default, the phone number was not being saved properly.

• An “Action Cannot be Completed” error that occurred when the user performed a business search from the Quick Search section was resolved.

• An issue with adding a business to a contact’s Personal content link was resolved. When the user performed a search for the appropriate business, the wrong dialog box was opening.

• Remarks fields throughout the system were improved to resolve issues with special characters and special formatting, including larger fonts.

• An issue in which alerts were not working consistently in the core system, SmartPolicies and SmartInvestments modules was resolved.

• The Manual Entries Only display option in the SmartPad is now cleared by default.

• The duplicate contact check for contact creation at sign-in was removed.
Corporate

- Hard-coded text was removed to account for customization by corporate customers.
- Special handling for data tracking was added for corporate home offices.
- Special handling for e-mail addresses, including special characters such as apostrophes, was added for a corporate customer.
- An “insert/update” error that occurred when corporate customers added a new office to a server was resolved. SmartOffice administrators can now successfully add new offices.
- Changes were made to user lists for a corporate customer. These changes include the ability to exclude certain users and display only specific users in some cases. This change does not apply to retail SmartOffice users.
- An issue related to converting a dependent to a contact was resolved for a corporate customer.

Correspondence

- A “failed to load object” error that occurred when the Resend Print option was used to resend a letter was resolved.
- An issue with form letters were not being sent properly was resolved. The issue occurred when the Send As option was used with SMTP Settings (Below) selected in Office Settings.
- An issue with sending letters was resolved. An incorrect address was displaying when the user selected the Business Address or Residence Address option before the letter was generated.
- An issue in which the Mass Activity Creation dialog box was not opening in the correspondence workflow was resolved.
- A correspondence workflow issue that occurred when the user tried to send an e-mail form letter to a contact was resolved. When dialog box for selecting the layout, subject and attachments opened, the E-mail Subject drop-down list was not working.
- When the Mass Correspondence shortcut key (F10) is pressed, the Correspondence Options dialog box now opens with the initial cursor focus on the first option, Compose E-mail. If that option is not present, the focus is on the Compose Letter option.
**Dynamic Reports**

- An issue with exporting XML Dynamic Report definitions was resolved. The XML definition export was failing if columns had special characters such as #. Special handling was added to account for these special characters.

- Issues with exporting data from the Proposal Tracking Dynamic Report were resolved. The formatting was not being retained when the data was exported to Excel.

- An issue with sorting in some Dynamic Reports was resolved. In certain reports, sorting was causing a “failed to load object” error. The issue occurred when specific groups were used in the report.

- An issue with displaying SmartPad notes while in Summary view was resolved. The user is now properly prompted to select a record before continuing with opening notes.

- An issue was resolved in which Dynamic Reports with five or more filter criteria were not being sorted correctly after being run.

- An issue with the XML structure for exporting Dynamic Reports was causing some reports to fail upon export to Excel. This issue was resolved.

- Formatting issues that occurred when a Proposal Tracking Dynamic Report was exported to Excel were resolved.

- Adjustments were made to the Dynamic Report as E-mail feature to enable reports to be sent in CSV or PDF formats.

- An issue that caused interruption of the Dynamic Reports as E-mail feature was resolved.

- An issue in which Dynamic Reports were displaying an incorrect number of records was resolved. The issue occurred when the custom sort was multi-level and grouped on a date field, and when the report was displayed in summary view.

- An issue in which the Dynamic Reports as E-mail service was not ignoring non-active offices was resolved.

- An issue in which the Dynamic Reports as E-Mail feature was not working on Small Business Edition servers was resolved.

**Enterprise View**

- SmartOffice Utilities and SmartIntegrator catalog changes were made to resolve issues with uploading documents while in Enterprise View. Enterprise View users should no longer encounter issues when uploading documents.

- In Enterprise View, when the user adds a primary advisor to a contact, the search is now limited to the primary advisors in the office in which the contact exists. This was changed to be consistent with the process for adding a primary advisor from the Policy Add and Pending Case Add dialog boxes.

- The Customer Referral Value Report was adjusted to run properly when Enterprise View is enabled. Previously, the report was displaying incorrect data when Enterprise View was turned on.
• A “failed to load object “error that occurred when the user switched to Impersonate Mode in Enterprise View was resolved.

• An issue in which newly added letter entries were not visible in SmartPad notes was resolved.

• An issue was resolved in which progress bars were not closing properly after certain SmartOffice operations ended.

• Improvements were made to performance across the entire system.

Filters

• New system filter syntax was implemented to make the use of system filters more logical based on the type of data being mined.

• New filter choices were added to enable the user to filter on Currently Logged In User and Currently Logged In User (All Proxies). This is useful for creating reports displaying data for specific users.

• To make the Filter List load more quickly, the tree structure view was replaced with a drop-down list containing all filter categories.

• A “failed to load object” error that occurred when the user selected Menu > Show Linked Dynamic Report and Set for a filter was resolved.

• Adjustments were made to the filtering of numeric columns to create a clearer distinction between numerical values and informative values (e.g., policy numbers).

• An issue with creating Dynamic Reports was resolved. The user was unable to search for filters from categories other than the one selected for the report’s creation.

Framework

• A privacy issue with Dynamic Reports portlets in home page themes was resolved. The Advanced Filter dialog box was displaying the list name when opened from the home page.

• An issue was resolved in which users were unable to add more than 200 entries at a time to lists or the SmartPad (e.g., adding a SmartPad note to multiple contacts from the Contact List).

• List grouping changes were made to remove the extra space above the blue background of cells.

• An issue was resolved in which Yes/No check boxes were handled inconsistently during export to Excel. Now, if the check box is not selected, the value is treated as null and is exported to Excel as a blank cell.

• Java and JavaScript compatibility issues that occurred when SmartOffice was accessed using Internet Explorer 8 have been resolved.

• Age validation and referral computation are now included in the services controlled from SmartOffice configuration (config.xml).
• Several issues involving the built-in HTML editor were resolved:
  o Keyboard shortcuts for increasing and decreasing font size were added. CTRL and the
    plus sign (+) increases the font size by one point; CTRL and the minus sign (-)
    reduces it by one point.
  o Font color can be changed with a single click.
  o A change can be undone using the keyboard shortcut CTRL+Z.

• An issue in which spreadsheet export was creating multiple entries in the SmartPad was
  resolved.

Home Page

• Users who do not have Dynamic Reports user rights can no longer view home page
  portlets that contain Dynamic Reports.

• Several home page-related user interface issues involving adding/loading from office
  settings (Access Log) were resolved.

• A home page issue in which a shared tab was not displaying was resolved.

• An issue was resolved in which the Modify Portlet button on the home page intermittently
  failed to work.

• Several refresh issues on the home page were resolved. When the user made changes or
  adjustments to home page portlets, in some cases the page was not refreshing
  automatically to reflect those changes.

• General user interface and usability adjustments were made to home page features related
  to importing, exporting and renaming themes.

Household

• An issue with changing the head of household was resolved. If a head of household had no
  address information and the user tried to add that information and save the record, the
  changes were not being saved.

• When the address of the head of household is added, modified or deleted, the change is
  now made for all household members after confirmation.

International

An issue in which the user was unable to search for primary advisors was resolved in the
Japanese edition of SmartOffice.

Set Membership

An issue was resolved in which the wrong set was being deleted after Set Merge if the Swap
button was used.
**SmartPad**

- Adjustments were made in SmartPad PDF printing to retain formatting for posted e-mail messages. These adjustments enable better handling of the disparate formatting found in posted e-mail.

- The number of records to which the user can add a SmartPad note simultaneously was increased from 200 records at a time to 1,500.

- An issue was resolved in which deleting appended notes resulted in the entire SmartPad entry being deleted.

- An issue with the display of the latest SmartPad notes in lists was resolved. The notes were not displaying properly when the user customized a list and added the Latest SmartPad Notes column.

- The Memo Date column in the SmartPad now reflects the date and time that a posted e-mail message was originally sent to a contact.

**SmartSecurity**

- An issue in which user accounts were not displaying properly when a SmartOffice administrator performed an open search for all accounts was resolved.

- A “page not found” error that occurred during Office Data Validation was resolved.

- An issue in which the New and Delete buttons were not visible in the Photo section of some contacts was resolved.

- An “insert/update failed’ error that occurred for some SmartOffice users when they tried to create new offices was resolved.

- A “failed to load object” error involving the contact record associated with a user was resolved. The error occurred when the user selected an advisor-type contact, deleted it and then tried to select a contact again.

- An access log issue was resolved. When the access log for a user was viewed, the log displayed access data for the admin user instead of the selected user.
SmartCalendar

Enhancements

- **Activity report improvements and printing options**: For easier printing and distribution, activity reports are now generated in PDF format. Users also now have expanded options for activity reporting with the addition of new reports, including a four-week report and date range report.

- **Option to restrict activity creation to self**: The user can now override default activity participant settings when creating an activity. From User Accounts > Detail, the user can choose the Create Calendar Activities for All Users option (which is the default) or the Restrict Activity Creation to Self Only option, which overrides default participant settings.

- **Faster method for adding participants to an activity**: To reduce the number of mouse clicks a user must make when adding participants, SmartOffice now features a menu that displays when the user positions the mouse pointer over the Add New Participant button. The menu contains users defined in the My Favorite User List in User Preferences (refer to the Core System Enhancements section on page 7 for more information about the My Favorite User List). Selecting a user from the list instantly adds that user to the activity.
• **Marker indicating current time in calendar views:** Users now have a visual cue to help them plan and manage activities. An arrow marks the current time on the Calendar Day and Calendar Week views.

![Calendar with current time marker](image)

• **Reschedule Activity button on Activity Search Results list:** It is now possible to quickly change the time of an activity after performing an activity search. This new button enables the user to reschedule an activity in the search results list without having to open the activity first.

![Activity search results with reschedule button](image)
• **Ability to change activity type colors from calendar views**: It is no longer necessary to leave the calendar and go to User Preferences to change the colors of activity types/sub-types. Now, those colors can be changed directly from the Calendar Legend by clicking the legend’s **Activity Type** or **Activity Sub-Type** link to open the Activity Color Options dialog box.

![Activity Color Options](image)

Clicking a color in the Custom Color Choices section then opens a dialog box from which the user can choose a color.

• **Activity reassignment improvements**: The Reassign Activities workflow has been enhanced to enable only tagged activities to be reassigned from the Calendar Agenda view. Previously, all activities were reassigned.

• **New Status drop-down list for task lists**: To enable the user to quickly display only those tasks of a certain status (Active, Cancelled, Done), a new drop-down list has been added to the Calendar Agenda as well as the Tasks sections of the Calendar Day and Calendar Week views.

![Custom Color Choices](image)
Solutions

- An issue with selecting a user in the Assign To field of the Activity Outcome dialog box was resolved. The selected user was not displaying in the Participants section of the newly created activity.

- An issue in which the same contact was being added twice to an activity’s Add’l Contacts content link was resolved.

- An issue was resolved in which the New Calendar Activity button in the Quick Action Corner was not opening a new calendar activity if the start time for new appointments was blank in User Preferences.

- An issue in which merge codes for custom fields were not displaying correctly in correspondence was resolved.

- An issue with the Activity Description field in the Mass Activity Creation Options dialog box was resolved. The field was expanding in some situations when text was entered.

- An issue with archived SmartPad notes for activities was resolved. The Archived Notes content link in the SmartPad was displaying notes that were not linked to the selected activity.

- E-Z Data copyright text was added to all calendar PDF reports.

- An issue was resolved in which participants’ names were not displaying in calendar reports using the Calendar Week, Four Week and Calendar Month layouts. The issue occurred when more than one user’s data was being viewed.

- An issue was resolved with the Tasks drop-down list located in the Calendar Day and Week views. The drop-down list now filters records only in the Tasks section.

- An issue in which the user was unable to format text in the activity Description field was resolved. The user can now open a separate dialog box to enter formatted text by clicking the Description field’s Maximize button.

![Description Field](image)
PDF Reports

**Note**: The terminology used for referring to PDF reports has changed in SmartOffice v7.

The terms “packaging reports” and “non-packaging reports” are no longer used to refer to reports that do/do not prompt the user to select options when they are run. These changes were made to prevent confusion with the new PDF report packages feature in SmartOffice v7.

In addition, individual PDF reports that the user can run to display results immediately for multiple contacts are now called “on-demand reports.” This change was made to distinguish this method of running reports from the report package method now available in SmartOffice v7.

Enhancements

- **PDF report packages**: The user can now process and access PDF reports more efficiently by adding multiple reports from different report categories to a report package. A report package can be run overnight, or the user can create a small report package (with up to five reports) to be posted to the Job Queue and processed within a few minutes.

To view and create report packages to be run overnight, select **PDF Report Packages** from the expanded **Reports** menu.

From the Report Packages list, click the **New ‘Package’ record** button to create a package.

Follow the instructions in the dialog boxes to finish creating the package.
To create a small report package for more immediate processing, select **PDF Reports** from the expanded **Reports** menu to display the PDF Reports List. Tag up to five reports and then choose **Select Contact Set** from the expanded **Menu** list.

After selecting a set, enter a package name. The package is then posted to Job Queue, and results are available within minutes.

In order for a report to be available for inclusion in report packages, an administrator must select that option in the report’s Detail content link while signed in to the System office.

- **Automatic report delivery to SmartView for Clients users**: The user can now review and easily post a PDF report as a document for a client through SmartView for Clients. On the side menu, select **Processed Reports Log** from the expanded **Reports** menu. Then select a completed package and click the **Detail** content link. Select a report from the list and then select **Share with SmartView for Clients** from the expanded **Options** menu.
Uploaded reports display in the Document List in SmartView for Clients.

This feature is available only for side menu reports; on-demand reports work as they previously did.

- **Layout changes in report selection dialog box**: The dialog box that opens when the user selects **Menu > Reports > Run Reports (PDF)** has been redesigned to be more user-friendly. The tree menu has been replaced with a list of report name hyperlinks. In addition, a new Report Category drop-down list enables the user to quickly narrow down the list of reports displayed.
Clicking a hyperlink immediately runs the report. If a report normally prompts the user to select options when it is run, clicking the hyperlink opens the report options dialog box.

- **Option to save settings when running reports**: Users can now save the options they have selected for reports so that they no longer have to select them every time they run those reports. Select the **Save settings** option in the report’s settings dialog box.

After a report’s settings are saved, its keywords are replaced with “User Customization,” and the Select a Report to Run dialog box displays the keywords “User Customization” to enable the user to recognize those reports containing saved settings.

- **Report definition import/export**: For corporate customers, this new feature enables administrators to quickly move all PDF report settings to a new installation of SmartOffice when upgrading to a new SmartOffice version. In the System office, select **Setup** from the side menu and then select **Report Setup**. Select a report from the list and then select the appropriate option from the expanded **Menu** list — either Export – Report Definition or Import – Report Definition.
• **Policy type selection in report settings**: When generating a policy report, the user can now select or clear options in the Select Policy Types section of the report settings dialog box to include or exclude particular holding types.

![Policy Report Details](image)

• **New Holding Statement report**: A Holding Statement with Liabilities report was added.

• **Updated Policy Detail report layout for life policies**: Numerous layout changes were made to improve the readability of the Policy Detail report for life policies, including more efficient spacing of columns and sections and the addition of several fields.

**Solutions**

• The PDF Client Detail report now displays “Do not call” phone numbers in red.

• An issue in which the international date format (DD/MM/YYYY) was not displaying correctly was resolved in all PDF reports.

• For pending case PDF reports, the options **All Events in Future** and **All Events in Past** were removed from the Date Range drop-down list in the pending case report settings dialog box. This is because events do not apply to Status Date.

• Position investment reports were modified so that policies with a value of 0.00 are no longer displayed.

• Issues with the inclusion of policies in As of Date investment reports were resolved. Policy dates were not being properly checked to determine which policies should be included based on the As of Date entered in the investment report settings.
• In the Pending Case Detail report, issues with the logic for retrieving data based on the entered date range were resolved.

• In the Processed Reports Log, an issue was resolved in which documents could not be deleted from the list of reports ready for review.

• An issue with e-mail notifications for completed PDF report packages was resolved. When the reports were shared as documents with SmartView for Clients users, notifications were not being sent to clients, even though the option to send notifications was selected in SmartView for Clients Setup.

• Issues with the **Save settings** option for on-demand reports were resolved. When the user saved report settings, the new report created (i.e., the report containing the keywords “User Customization”) returned an error when run.

• An issue was resolved in which the date range could not be saved along with other settings in user-customized PDF on-demand performance reports and performance report packages.

• The keyword “User Customization” now displays in the **Select a Report to Run** dialog box, enabling the user to easily see those reports for which the user has saved settings.

• An issue was resolved in which PDF reports were displaying addresses with Line 1 and Line 2 on the same line.

• In the Asset Allocation report, the % of Position column was renamed to % of Assets. In addition, all investment household reports now display household members’ names above the column labels.

• An issue in which Holding Statement reports were missing variable annuity subaccount totals was resolved. In addition, the reports now display subtotals based on variable annuity investment name and account number (previously, the account number was ignored).
Advisor/Agency

Enhancements

General

- **More space for appointment numbers**: To give users more space to enter lengthy appointment numbers, the size of the Appointment # field has been increased to 64 characters.

- **Improved visibility of advisor data**: To make it easier for users to retrieve data from advisor records when the Production Dashboard is displayed, the Phone Numbers, Addresses and E-mail/Web Addresses sections have been made more visible.

SmartView for Advisors

**SmartView for Advisors list printing**: SmartView for Advisors users can now obtain hard copies of their contacts, pending cases and policies by selecting *Menu > Print List* while viewing a list.

Solutions

General

- An issue with a SmartView for Advisors privacy option in Policy/Case Setup was resolved. Selecting the **Display cases/policies based on Policy Advisor List** option was incorrectly hiding cases that users should have been able to see based on contacts assigned to those users.

- An issue with an agency merge code that printed the last name of the agency’s primary contact instead of the agency name was resolved.

SmartView for Advisors

The process for creating user names for SmartView for Advisors users was changed to limit user names to 20 characters. Also, the system no longer randomly generates user names.
SmArtCaseManager

Enhancements

- **Automatic requirement creation for informal cases**: A new option in Policy/Case Setup enables requirements to be automatically created for informal cases. The **Include informal cases in automatic creation of underwriting requirements** option is located in the Initial Informal Workflow section of Informal PCM Workflows. When the option is selected, informal case requirements are automatically created based on the underwriting guidelines; if it is not selected, underwriting requirements are not automatically created for informal cases.

![Initial Informal Workflow](image)

- **SmartView for Advisors with Case Status**: An agency can limit the information an advisor can see—and gain greater control over its data—by selecting this new option when creating a new SmartView for Advisors user. To access this option, select **Menu > SmartView for Advisor User Accounts** from the Advisor or Agency List.

![SmartView for Advisor User Accounts](image)
- **Ability to print premium history**: When viewing a pending case’s premium history (Menu > Show History), the user now has a Print option available from the expanded Menu list of the premium history dialog box.

![Premium History Print Option]

- **Underwriting guideline notes**: Notes related to underwriting guidelines are part of some data feeds from carriers, and now SmartOffice has a place to store them. These notes are available on the Underwriting Guidelines and Notes content link at the carrier and product levels.

![Underwriting Guidelines and Notes]

- **Enhanced rider assignment**: Rider assignments to products have been updated to associate the rider with the product for certain states.

- **Improved drop-down customization message**: The message that displays when the user deletes a choice from the Drop-down Choice Customization dialog box was updated to help the user better understand what results to expect.

- **Data safeguards added**: To protect data, SmartOffice no longer allows carrier migration for a parent office carrier from a child office. In addition, a carrier subscription can no longer be deleted if the carrier has any linked policies or contracts.
Solutions

- An issue in which the Multi-Life Policy and Do not include in reporting options were visible for non-life lines of business was resolved. The option was removed from those lines of business.

- An issue with adding a service provider account for a carrier was resolved. Clicking the Service Provider hyperlink was displaying incorrect data.

- Blank status choices in the Status drop-down list for policies and pending cases were removed.

- An “insert/update failure” error that occurred when the user entered requirement data on the editable spreadsheet was resolved.

- An issue was resolved in which the merge codes for delivery requirements pertaining to pending cases in a child office were not expanding correctly. The issue occurred when Enterprise View was turned on.

- An issue in which correspondence to an advisor was being posted twice to Pending Case Notes was resolved.

- A SmartPad issue that occurred when Enterprise View was turned on was resolved. When the user posted an e-mail message to a case in the child office while signed in to the parent office, an incorrect e-mail message was being posted to the SmartPad.

- The ability to merge or delete requirements referenced in any underwriting guideline grid was removed to prevent data integrity issues that such merging or deletion can cause.

- An issue with sending a Case Status by e-mail from the Pending Case List, Policy List or Advisor List was resolved. If an advisor had multiple e-mail addresses separated by a semicolon, the process was not being completed, and the e-mail message was not being sent.

- An issue was resolved in which duplicate delivery requirements were displaying.

- An issue was resolved in which an extraneous warning message was displaying when the user added a plan type. The warning asked the user to select a carrier for a product, even when the product already had a carrier.

- An issue with merge codes for custom fields that were not displaying correctly in correspondence was resolved.

- In the Carrier Underwriting Notes dialog box, the OK button was renamed Add.

- An issue with changing the status of a requirement for a pending case was resolved. When the user tried to send a letter by e-mail to a carrier in a higher-level office, the E-mail Address drop-down list did not work properly.

- Extraneous HTML buttons that displayed between the Requirement(s) and Requirements Remarks fields of the underwriting requirement detail dialog box were removed.

- Errors in the manner in which premiums were being calculated and updated were resolved.
• An issue with the display of activities linked to policies and pending cases was resolved. The activities were displaying in the Follow-up Activity List even when they were already marked Done or occurred on a future date.

• If the user enters data for modal flat extra and indicates it is commissionable, then no changes should be required in the commissionable modal because it is already included. However, commissionable modal flat extra was being included in the commissionable modal premium to calculate the commissionable annualized premium. This issue was resolved.

SmartPolicies

Solutions

• The joint annuitant, second annuitant and second insured were previously excluded from a contact’s benefit’s inclusions. These have now been added.

• An issue with changing the plan name for a variable universal life/variable annuity policy was resolved. SmartOffice was not checking for the linked subaccounts for the policy, which could cause data inconsistencies. SmartOffice now checks and prompts the user if subaccounts are found.

• A “failed to load object” error that occurred when the user merged products, group products and riders was resolved.

• An issue with adding a policy for a contact with no primary advisor was resolved. A user is no longer added automatically to the User Assignment of the contact.

• An issue was resolved in which duplicate activities were visible on the Polices and Pending Cases tabs of activities when multiple participants were involved.

• An issue was resolved in which updating the face amount or changing the status of a pending case did not change the total death benefit value of the related policy.

• A script error that occurred in the second New - Policy dialog box was resolved. The error occurred when the user clicked the Plan Name hyperlink in the Basic Policy Information section.

• An issue was resolved in which some pending case filters that the user changed when a report was run were not filtering properly. The issue affected the following filters in the Policy table: Active Stage, Approved Stage, Await Approval Stage, Inactive Stage, Informal App Stage and Proposed Stage.

• An issue was resolved in which the Role column (from the Interested Party table) was blank in some areas of the system. The issue occurred when the user customized the layout of the Policy Advisor List of a pending case or policy.
Insurance Carriers/Products

Enhancements

Key relations data visibility: Key relations information is now displayed even for carriers that are not from the office that the user is signed in to.

Solutions

An issue that occurred when the user added a new carrier was resolved. The default download method was being incorrectly set to Direct Download and Replace instead of Manual Side-By-Side Processing.

SmartBenefits

Enhancements

- Document list for group products separate from group policies: Files specific to a group product can now be stored and accessed separately from files linked to a group policy. The files are now available from a group product’s Documents content link.

- Introduction of group product notes for better record-keeping: To make record-keeping for group products consistent with that available for products, the user can now add Group Product Notes. Buttons for adding and viewing group product notes are now available on the group product List and Detail content links.

- Improved and expanded Dynamic Reports: Users now have a wider range of reports available with the addition of the Business column for Dynamic Reports belonging to the Group Policy and Members category.
Solutions

- An issue with values in calculated fields on the Premium content link of a group plan was resolved. The values were not resetting to zero after values in the fields used in the calculations were removed.

- An issue was resolved in which an advisor who was added to a new group policy for a business was not displaying until the record was refreshed.

- A “failed to load object” error that occurred when the New (Comprehensive) button was used to add a group policy was resolved.

- On the Custom Button Bar of a group policy’s Detail content link, an issue in which the Correspondence button was not working was resolved.

- An issue was resolved in which clicking the New ‘Group Policy’ record button from the Group Policy List was opening the Select Policy Stage dialog box. This was inconsistent with similar workflows in other areas of SmartOffice.

- An issue that occurred when the user added a group policy from a child office was resolved. If the user selected a carrier from a parent office, group products from the child office were not available for selection.

SmartCommissions

Enhancements

General

- **New SmartCommissions for Advisor module**: For users who want to track advisor commissions only, without using the contract file or establishing a hierarchy, a new commission system is now available. This system is based on a commission calculator found in each policy. The user runs the calculator and enters the percentage to be paid to the advisors on the policy. Projections are generated. When the advisor’s commission check is received, the user runs an advisor-specific reconciliation process and can identify the actual amount received. Reporting of expected vs. received commission is available. To enable SmartCommissions for Advisors, enable the Commissions – Advisor Commissions license for the office (through the System office), then assign the appropriate user right to the user.

- **New Options banding on the rate file**: The new banding enables a single product to have different features that affect commissions. Instead of requiring multiple products to be defined simply because the commission structure of the product could be different, SmartCommissions now enables the user to define a single product with unique options that point to different rates. The option becomes a band similar to state banding in the rate file. Enter the options on the product’s Detail content link, in the Product Options section.
Once options are entered for the product, they can be selected in other areas of SmartOffice, such as the Options field of a policy or pending case.

- **Simplified method for updating the rate file**: To enable quick editing of multiple rates at one time, a button called Edit Commission Rates has been added. From the Commission Rates List, tag multiple rates and select the button from the expanded **Menu** list to display the details of the rates in an editable spreadsheet.

After saving any changes, the user is given the option of applying the rates to all policies or only to new policies going forward.

**Batch Processing**

**Changes to adjusting entries**: When the user includes adjusting entries, entries are now included up until the date of the batch and not beyond. Previously, all adjusting entries were included regardless of date.
Solutions

General

- An issue was resolved in which not all policies were being displayed on an advisor’s Cont./Appt. content link when the user selected a contract and viewed its related policies using Options > Related Policies. Only policies for which the advisor was the primary advisor were being displayed. Now all policies in which the advisor has a role are listed.

- An error that occurred when the user saved an editable spreadsheet after entering commas was resolved. The Remarks columns in editable spreadsheets now allow commas.

- An issue in which the Advisor Payout Import function in Commissions Setup was not properly importing the external advisor was resolved.

- An issue was resolved in which sorting and grouping features were changing when the user exported records to Excel. Now, the exported data retains the same sorting and grouping as the Dynamic Report that generated the data.

- Performance issues with the Mass Assign Contract feature available from the carrier Contracts tab were resolved. The feature was not allowing a large number of advisors to be assigned at one time. The workflow now allows mass assignment of large numbers of advisors.

- On the Policy Transactions content link, when the user enters commissionable premium payment transactions to generate expected commission records, the transaction date now begins on the policy effective date instead of today’s date.

- Issues were resolved with several messages that were not displaying properly. For example, if the user tried to delete a processed batch, the message informing the user that the action was not allowed was not displaying. Also, in Carrier Posting, a user using the auto-reconcile posting feature was not being prompted if the house account was not properly identified.

- An issue was resolved in which the recalculate commission workflow was starting when the premium on an inactive or proposed pending case was changed. The workflow no longer starts for cases in those two stages.

- Issues with importing commission information using the Split Commission Payment Import feature were resolved. The issues prevented data from being imported and saved properly. Base and Trail commissions were being imported in two unique rows instead of a single merged row, and other premium types such as Flat Extra and ERA were not being properly imported based on the type.

- In expected commission records, an error involving calculation of the Net % of Premium field was resolved. The calculation was being made based on the component premium instead of the calculated premium. This caused excess record types to be incorrectly calculated because, in the case of excess, the component premium is the target component.
Carrier Posting

- An issue was resolved in which the rider commission first year records were not being generated properly when a universal life policy was entered into the system where Minimum, Maximum and Over Maximum were used.
- An issue was resolved in which a Validated and Linked speed receipt transaction was being reset to Validated when Processed/Reconciled (SRE)/Waived (SRE) Expected Commission records were closed using the Set Status Close button.
- An issue was resolved in which the proper prompts were not being displayed when the user tried to delete a processed carrier posting, or when the user was auto-reconciling a carrier posting.

Speed Receipt Entry

- An issue was resolved regarding the Error/Validated status of Speed Receipt Entry transactions. When the Advanced Split definition was used—and when that definition was using Base Commission as the percent—the message “Base Commission Not Defined” was not displaying in the Error/Validated status column as it should.
- An issue was resolved in which the Accept as Adjustment feature was not working if the policy number was not found.
- An issue with the Calculate Commission button was resolved in which the due date was being calculated from the check date instead of today’s date.
- An issue in which the Accept as Adjustment feature was not filling in the commission year was resolved.

Expected Commission List

- An error that occurred when a pending case’s status was changed to Delivered was resolved. SmartOffice was prompting the user to rebuild and re-project commissions when the status was changed to Delivered. However, the re-projection was failing.
- An issue was resolved in which the Created On and Created By columns for chargeback records were not updating properly.
- For Group Policies, an issue was resolved in which the hierarchy was not being built properly during the New (Comprehensive) add process.
- An issue was resolved in which the advisor payments on Expected Commission records were remaining in a status of Assumed Paid for chargeback records. Now, when a chargeback record is generated from an originally paid commission transaction, the advisor-level payments are set back to Open until the chargeback is received during carrier posting.
- An issue was resolved in the Expected Commission records for advisors. Changes made to advisor-level transactions were not being properly saved.
Advisor Statement

An issue was resolved in which any adjusting entry that was made for an advisor without an associated policy being specified was not visible from the advisor statement.

Batch Processing

- A mismatch between the Check Amount and Receivable displayed in the Advisor Check Detail dialog box was resolved. The issue occurred when a commission payable record was created from the Advisor Statement List with a Record Type other than Adjustment and the option **Save as an adjustment entry** was selected.

- An issue was resolved in which the E-mail Commission feature was including transactions that were still open. The regular statement generation for printing commission statements included the proper transactions and was not affected by this issue. The overall performance of this part of SmartOffice was also improved.

- An issue was resolved in which the Unpost Batch feature was retaining the link between some transactions and the current batch. Now, that link is cleared and reestablished the next time the user selects Process Commission Batch to reinitiate the posting process.

- An issue was resolved in which the proper prompts where not being displayed when the user tried to delete a processed batch. The message “Batch once processed cannot be deleted” is now displayed.

- An issue in which selecting the **Include adjusting entries** option was including future adjusting entries was resolved. Any record with a due date after the batch date is no longer included.

- An error that occurred when the user attempted to delete a processed batch was resolved. A “failed to load object” error was displaying instead of a message informing the user that a processed batch cannot be deleted.

Carrier Interface

An issue with information received during ACORD and NAILBA imports was resolved. The information was not being properly moved into Speed Receipt Entry when the Copy to Speed Receipt Entry function was run from the Carrier Interface area. Also, the record matching to link to an advisor is now independent of the link to the policy.
SmartInvestments

Enhancements

General

- **New fields for tracking new/modified data:** To make it easier for users to track the dates that data was created and/or modified and by whom, the following fields have been added throughout SmartInvestments: Created By, Created On, Modified Date and Modified By.

- **Additional shortcut keys:** To improve keyboard navigation in SmartInvestments, shortcut keys were added to provide fast access to the following content links:
  - Household > Performance (ALT+J)
  - Contact > Performance (ALT+J)
  - Contact > Alert Results (ALT+T)
  - Investment Alerts > List (ALT+S)
  - Investment Alerts > Alert Results (ALT+A)
  - Investment Alerts > Dismissed Results (ALT+R)

- **Ability to run validation for multiple levels at once:** The user can now run validation more quickly. Regardless of where the user is when validation is initiated, validation now occurs at all levels, beginning at the contact level and continuing through the account, position and transaction levels.

- **Ability to search by SSN when linking accounts:** Finding the appropriate contact when linking an unlinked account to a contact is now easier with the addition of a Social Security Number field to the Search Contact dialog box.

- **Mass modification enhancements:** To expand the user’s ability to modify multiple records at once, the Mass Modify utility has been enhanced to include the following fields and check boxes:
  - For investment accounts, the Qualified Account and Held Away Account check boxes on the Account Detail content link.
  - For investment positions, the Share with Client and Asset Allocation Member check boxes on the Position Detail content link.
  - For investment securities, the Price Factor field on the investment security Detail content link.

**Performance Reports**

- **Ability to sort by account number:** This new sorting option is now available to users for Contact and Household reports.
Investment Accounts

- **New security Symbol column**: For users who often find the security symbol more useful than the security name when viewing lists, a Symbol column is now available on the Account Transactions content link. The column can be added when the user customizes the list layout.

  ![List Layout Customization](image)

  The column is also available on all other lists for which the Investment Name column is available.

- **Ability to close accounts with active positions**: To give the user the flexibility to close an account without having to liquidate each position first, the system now enables the user to change the status of an account to Closed even if the account contains active positions. The system warns the user that there are active positions but no longer prevents the user from closing the account.

- **Saved list views**: The system now remembers the most recent option selected from the Status drop-down list on the Investment Account List and the Investment Position List. This eliminates the need to reselect this status option each time the user navigates to the lists, effectively enabling the user to set a preferred view for those lists.

- **More consistent display of content links**: Content links that were not displaying from certain tabs were added to improve consistency throughout SmartInvestments. One example is the Position Performance content link, which is now available from the Investment Positions tab.

- **Security measure for Tax ID information**: To protect sensitive data from being viewed by unauthorized personnel, the first five digits of the Tax ID field on the Account Detail content link are now hidden from view until the user selects that field.
Investment Alerts and Dashboards

- **Investment Alerts and Dashboards refinements**: Changes were made to the Alerts and Dashboards setup to make it easier for SmartInvestments users to access those features. Alerts and Dashboards are no longer separate licenses; they are now included with the SmartInvestments license and are therefore enabled for any user who has that license.

- **Better logging to aid troubleshooting**: Logging for alerts was enhanced to enable E-Z Data to better troubleshoot issues encountered by users.

- **Improved Dashboard selection from home page tabs**: When the user adds Investment Dashboards to a SmartOffice home page tab, the Add a new portlet to your Dashboard drop-down list now includes all available dashboards. The user no longer has to manually specify which dashboards display in the drop-down list.

Investment Positions

- **Security symbol displayed with name**: The security symbol now displays alongside the security name throughout the system, presenting more complete information about each position. For example, the heading of the Position Detail content link now includes the symbol as well as the name of the security.

- **Enhanced personal holdings navigation**: When the user navigates from the Position List to the Position History, Position Performance, Account Detail and Position Custom content links for a personal holding, the user is now warned that the content link is not applicable to a personal holding.

- **Positions tab available from VA subaccounts**: The Investment Positions tab is now visible at the Investment Securities variable annuity subaccount level.

- **Tax ID security at position level**: For enhanced security of sensitive client data, the Tax ID field on the Position Detail content link is now masked, as it is on the Account Detail content link.

- **Automatic position maturity date entry**: When the user creates a position based on a security that includes a maturity date on its Detail content link, the position’s maturity date is now automatically set to the same date as the underlying security.
Investment Reports

- **New message informing user about “As Of” date**: A message was added to the Reports dialog box to clarify how the report functions if the user leaves the “As Of” date blank. The message explains that the report will display Current Value information from the Position Detail content link. Note that no changes to the report’s logic or functionality were made. This change is intended simply to inform the user about what results to expect.

- **New Position Subaccounts report category**: To enable users to run reports using subaccount information, a Position Subaccounts category was added to the Investment report family in Dynamic Reports.

![Search Dynamic Reports](image)

- **Improved Account Master Account Detail Report**: The report now displays a subtotal for each grouping.

![Report Example](image)
• **More positions included in reports using As of Date option**: For accounts set to Roll Up Current Value Only or Do Not Roll Up, when position data is inserted from a download for the first time, the date of the download is now inserted into the position’s Purchase Date field. This enables the user to run investment reports using the As of Date option. Previously, when a user ran an investment report using the As of Date option, any position with a blank purchase date did not display on the report.

• **New Investment Summary report**: For users who want to include purchase date information in the Investment Summary report, a new Investment Summary with Purchase Date report was added.

<table>
<thead>
<tr>
<th>Select a Report to Run</th>
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<td>Report Category: All</td>
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<tr>
<th>Report Name</th>
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<tbody>
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<td>Asset Allocation</td>
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<tr>
<td>Balance Sheet - Bank Format Report</td>
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<tr>
<td>Balance Sheet - Investment Format</td>
</tr>
<tr>
<td>Investment Summary</td>
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<tr>
<td><strong>Investment Summary with Purchase Date</strong></td>
</tr>
<tr>
<td>Position Summary</td>
</tr>
<tr>
<td>Report Category: Transaction</td>
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<tr>
<td>Client Transaction Report</td>
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</table>

• **Transaction report improvements**: The Transaction Type column on the Client Transaction report is now left justified. Also, the transactions on the Transactions by Security report are now first grouped by Account Name and Number and then sorted in order of Transaction Date. These enhancements make the report easier to read, particularly in instances where the same security is held in more than one account.

• **Ability to sort by position liquidity**: An option to sort by position liquidity was added to the report options dialog box that displays when the Balance Sheet - Investment Format report is run.

**Performance Calculations**

**Ability to run performance calculations for multiple levels at once**: The user no longer has to run the Performance Calculations utility separately from the Performance content links at the contact, account and position levels. Now, regardless of which content link the user is currently viewing when running the utility, the calculations occur at all three levels. (Note that calculations still have to be generated separately for the household Performance content link).

**Performance Reports**

**New column for Top 10 Holdings Performance Report**: An Annualized Return column was added.
SmartView for Clients

- **E-mail notifications for documents**: The advisor now has the option to send an e-mail notification to a client when documents are made available for the client to access.

- **Disclaimer and document sharing enhancements**: To enable advisors to better manage messages to clients and improve readability, the policy and investment disclaimers have been separated from the Advisor Message on the home page. Also, advisors now have greater control over which documents their clients see. When a document is posted to a client’s SmartPad, it is no longer automatically available to the client through SmartView for Clients. The advisor must now specify which posted documents should be shared with the client.

Solutions

General

- The shortcut key to access the Performance content link of a contact was changed to ALT+J to eliminate a conflict with an existing shortcut key.

- An issue in which Held Away Assets and Held Away Debt were not correctly reflected on the contact Benefits content link was resolved. These values are excluded from the Total Assets calculation but are now included in the Net Equity calculation.

- The current annuity value is no longer recalculated upon validation for all non-variable annuity policies.

- In the Identifier History dialog box, the ToolTip for the button used to create an Identifier History record was corrected. In addition, an Enable Alerts button image was added to Investment Alert Setup.

Internet Quote Service Utility

The Service Tips section of the Internet Quote Service window now displays information informing the user how the Internet Quote Service works.

Investment Alerts and Dashboards

- The data refresh process is now a separate function for each of the Alerts and Dashboards features, enabling both to refresh more quickly.

- The results data for Investment Alerts no longer includes accounts that are not assigned to a contact.

- If an alert is deleted from a SmartOffice home page tab, the alert template is no longer deleted from the entire system.

- A “failed to load” error that occurred when the All Interested Parties column was added to the Investment Position List was resolved.
Investment Accounts

- An error that occurred when the user tried to create an investment account from any investment account content link except for Detail was resolved.
- A change was made to the investment account and investment position Custom fields to properly display custom choice field names.

Investment Positions

- An issue in which the Held Away Asset option was selected automatically for newly added personal holdings was resolved. That option is now cleared by default.
- An issue was resolved in which special characters used in the Remarks field of a position were displaying HTML tags in addition to regular text.
- An issue that occurred when a position history record was added to the Position History List was resolved. The Total Records field was not updating to reflect the record just added.
- An issue was resolved in which the Save function was not working properly when a new variable annuity subaccount was added to an existing variable annuity position.

Investment Securities

The Relink Subaccounts utility now lists the available variable annuities in alphabetical order.

Investment Transactions

When a transaction that liquidates a position is cancelled or reversed, the position status now changes back to Active.

Investment Reports

- For Performance Reports, closed positions are now included among the positions listed in the body of any report displaying individual positions. This change does not affect the Rate of Return calculation for the account that includes the closed position; that calculation continues to include the closed position’s rate of return.
- The names of various Position History categories were modified to eliminate duplication. This change makes it easier for the user to identify and select Position History categories during the creation of a Dynamic Report.
- An issue with the Balance Sheet – Bank Format Report was resolved. The report was including liabilities that were held away, even when the Include Held Away Assets option in the report options dialog box was not selected.
- When multiple accounts are tagged and an Account Master report is run, accounts with a Suspended status are now included in the output. Previously, suspended accounts were excluded.
• When Asset Allocation, Investment Summary and Position Summary reports are generated from the household, they once again include a pie chart, and the values for % Value and Total Current Value are correct.

• In the Investment Performance Summary report, the ending value date in the box at the bottom of the report now displays correctly.

Performance Calculations

• An issue that occurred when the user ran the Performance Calculations utility and cancelled the Missing Prices Summary dialog box was resolved. The system was processing performance calculations instead of returning the user to the Performance content link.

• The Missing Prices Summary dialog box no longer lists the same date twice for closed positions whose purchase date is the same as the initial performance date.

Performance Reports

• Performance reports no longer include any personal holdings in the list of positions.

• An issue was resolved in which positions whose purchase dates did not fall within the selected date range for a report were still being listed on the report.

• Two changes were made to more accurately reflect a position’s status and value. When the Investment Performance Summary report is run, if the beginning date of the report is before the purchase date of a position in the account, then that position’s beginning value is N/A instead of zero. Likewise, if the “through” date of the report is after a position has been liquidated, the ending value for such a position is N/A.

SmartView for Clients

• The name of the dialog box for creating a new SmartView for Clients user was corrected.

• Disclaimer text now retains proper formatting and does not display html tags.

• In SmartView for Clients setup, the options to change font type, font size and other formatting for the advisor message, policy and investment disclaimers have been restored.
SmartOpportunities

Enhancements

- **Automatic opening of activity creation dialog box on stage change**: The activity detail dialog box now opens automatically when the stage changes (if the stage includes a calendar action to create an activity automatically). This enables the user to view and change activity details immediately; previously, the user had to access the activity manually.

- **Notification about event invitees**: When the Event action type is performed from the opportunity Detail content link, the user no longer has to view the event’s invitee list to find out whether a contact has already been invited. The user is now notified if the contact is already part of the event.

- **Automatic stage change upon action completion**: It is no longer necessary for the user to change the stage manually when a stage’s actions are completed. The user now has the option to move to the next stage automatically.

- **Calendar activity action updates**: As part of a continuing effort to bring actions into sync with activity outcomes, Calendar Activity-type actions are now updated as completed or not completed depending on the activity outcomes selected.
• **Stage change for multiple opportunities from different processes:** To move multiple opportunities from different processes to the next stage, the user previously had to change each opportunity’s stage individually from the opportunity’s Detail content link. Now, a button on the Opportunity List enables the user to move multiple opportunities from different processes to the next stage automatically.

![Menu with option to move to next stage](image)

• **SmartPad record of deleted opportunities:** For enhanced recordkeeping, an entry is now posted to a contact’s SmartPad when an opportunity linked to that contact is deleted.
• **Import/export of opportunity process definitions**: The user no longer has to recreate a process’ entire definition setup. Instead, the user can export and then import a process definition, including the stages and their order, from Opportunity Setup. From the Process list, select **Export – Process** or **Import – Process** from the expanded **Menu** list.

• **Expanded ability to change primary owner**: An opportunity administrator with group reporting rights can now change an opportunity’s primary owner. Previously, only a Super User could do so, and the user was unable to give Super User rights to all users.

• **Ability to change primary owner during opportunity creation**: With this enhancement, the user can now override the default primary owner listed in the New - Opportunity dialog box.
• **Ability to add contacts to opportunities during contact creation**: The user can now save time and extra mouse clicks when adding a new contact to an opportunity by using the new Add to Opportunity section in the New – Contact dialog box. After filling in other contact details, click the **Process** hyperlink in this section to select the appropriate process.

![Add to Opportunity](image)

• **Search options saved on Global Opportunity List**: To help minimize the need to re-enter the same search criteria when searching for opportunities, the system now remembers the user’s most recent selections from the Process and Status drop-down lists on both the Search Opportunities dialog box and the Global Opportunity List.

• **More detailed Open Opportunities column**: The Open Opportunities column now gives the user more extensive information by displaying the name of the process in addition to the number of open opportunities.

![Open Opportunities](image)

• **New column displaying latest activity outcome notes**: The user can now display the latest activity outcome notes in lists and reports with the addition of this column in the Opportunity table.

![List Layout Customization](image)

• **User group data in the Opportunity Dashboard**: In addition to displaying opportunities associated with individual users, the Opportunity Dashboard can now display opportunities for multiple users when a user group is selected from the User Name field.
Solutions

- An issue was resolved in which the Link Activity dialog box that opens for an activity outcome displayed the Opportunity Name field, even when the user did not have SmartOpportunities rights.

- An issue that occurred when running a Dynamic Report from the Campaign category and Opportunity family was resolved. If the report returned no records, the user was being prompted to create a new record.

- An issue with the Calendar Activity action was resolved. When the completion date was entered before the start date, the date was being saved. The date should not be saved until the start and end dates are validated.

- An issue was resolved regarding the information card that displays when the user positions the mouse pointer over a record on the Opportunity List. The card was displaying the HTML page break code (<BR>).

- An issue in which the Letter Title and Letter Description columns were not displaying proper data was resolved.

- An issue in which the Related Contacts section was visible on the Opportunity tab of a lead was resolved.

- An issue was resolved in which clicking the View SmartPad Notes button on the Custom content link of an opportunity opened the Search Contacts and Businesses dialog box instead of the SmartPad dialog box.

- To resolve an issue in which new opportunities without processes were not being created, the Process field is now mandatory when creating an opportunity.

- An issue was resolved in which an extra line was displaying in the Stage Action Definition dialog box accessible from Opportunity Setup.

- An issue with Opportunity Owner-category Dynamic Reports was resolved. When a report was customized to display the Current Stage Action(s) column, the column was displaying blank in some cases.

- An issue was resolved in which calendar activities created from Opportunity Setup were not displaying for users who did not have SmartOpportunities rights but who were activity participants.

- An issue that occurred when the user created an opportunity from a list was resolved. The contact name was defaulting to the selected record in the list instead of being blank.

- A “failed to load object” error that occurred when the user ran a Stage History-category Dynamic Report was resolved. The error occurred when the Days in Stage column was included in the report.

- The Needs column was removed from the Opportunity table, and an Areas of Interest column was added. The new column displays data from Areas of Interest column of the Leads table.
• An issue was resolved regarding Opportunity Reports included with the SmartOpportunities module. Running such reports displayed the characters “####” in the Estimated Revenue column.

• An issue regarding the column Next Activity/Task On from the Opportunity table was resolved. When the Opportunity List layout was customized to include the column, the Next Activity/Task By column from the Contact table was displaying nothing.

• An issue with displaying the SmartPad entries for multiple opportunities at once was resolved. From the Global Opportunity List, when the user selected more than one opportunity and then clicked the SmartPad button, the SmartPad displayed notes for only one of the selected opportunities instead of displaying a consolidated list of entries for all selected opportunities.

• A script error that occurred when the user signed out of SmartOffice from the SmartOpportunities module was resolved.

• An issue was resolved in which click the Save button on the opportunity Detail content link opened the Activity dialog box twice.

• An issue was resolved in which the Opportunity field in the activity detail dialog box became blank after the user ran a calendar Dynamic Report.

SmartLeads

Enhancements

• **Improved leads navigation**: SmartLeads tabs and content links were rearranged to be more like those of contacts, giving the user a more consistent navigation experience across the system.
• **New Internet lead alert**: Advisors can now be alerted instantly when they receive new Internet leads. A new option in the Alert Center under **Tools > Options** enables the user to turn on e-mail alerts for those leads.

![Alert Center screenshot](image)

• **New lead fields**: To make lead information more complete, users now have additional fields available. On the lead Detail content link, Company and Job Title fields were added. For advisor-type leads, an Agency field was added. Also, Business Fax, Mobile, Web Site and Job Title fields are now available in the mapping definition for lead imports.

**Solutions**

• An error that occurred when the Contact Name hyperlink was clicked in the Auto Assign Leads Using Record Match dialog box was resolved.

• An issue in which the Manual Lead Routing button was displaying in the Leads tab of a campaign was resolved.

• An issue was resolved in which selecting both the **Dispatched** and **Include Lead Status History** options in the Leads Dashboard did not return any results.

• An issue in which documents were not being posted to the Documents content link of a lead was resolved.

• An issue was resolved regarding accepted leads for which the option Not Interested – Create New Activity was selected when the user performed Leads Disposition. These leads were not displaying in the Leads List when Not Interested was selected from the Status drop-down list.

• An issue was resolved in which the message “This link is no longer available” displayed for users with the Leads View license. The message displayed when the user selected Leads Follow-Up from the expanded Calendar menu in the side menu.

• The name of the Client Need field on the Search Leads dialog box was changed to Areas of Interest.
• An issue was resolved regarding accepted leads for which the Sale Made or Sale Lost option was selected when the user performed Leads Disposition. A new activity was not being created.

• An error that occurred when the user accessed the Custom content link of a lead was resolved.

• On the leads list, the Reject button is no longer available if the user does not have the proper permissions for deleting contacts/businesses.

• The shortcut key ALT+D on the Documents content link of a lead was removed because it placed the user’s cursor in the address bar in Internet Explorer 7.

• An issue was resolved in which the Correspondence Options dialog box did not open when a lead without a campaign was accepted.

• An issue was resolved in which the end time of an activity was not correct after the user performed Leads Disposition.

• Two issues involving leads associated with campaigns were resolved:
  o When the campaign was configured to prompt for handling options, accepting the lead was opening the Select Action for Accepted Leads dialog box without correspondence options.
  o When the campaign was configured to prompt for handling options or to perform handling options as defined, letters were not displaying in the Letters/Documents content link when the lead was accepted.

• An error that occurred when a user assigned a lead to another user in the office was resolved.

• An issue was resolved in which clicking the View Opportunity Notes button from an accepted lead’s Opportunity Detail content link opened the Lead Notes dialog box. The Opportunity Notes dialog box now opens.

• An issue was resolved in which a lead created from the Search Leads dialog box (accessed from the side menu) contained the same information as the first contact in the database.

• A “failed to load” error that occurred when the user clicked the Letters/Documents content link of an accepted lead was resolved. The error occurred when the user performed the letter options of the lead’s associated campaign.

• An issue in which the leads coordinator could not change the campaign from the leads Detail content link was resolved.

• An issue in which the Areas of Interest field on the lead Detail content link was larger than it should be was resolved.

• An issue was resolved in which mobile phone, alternate e-mail address, Web address and fax information was not being moved properly to the contact when the lead was accepted.

• An issue was resolved in which processing was being cancelled while a lead was being accepted.
• A script error that occurred when the user clicked the Split button for addresses for a lead was resolved.

• SmartView for Advisors users are no longer displayed in the Available Users dialog box when a lead is accepted.

• An error that occurred when the user clicked the Show Leads for Proxy Users button from the Unaccepted Leads List was resolved. The error occurred when Enterprise View was turned on.

• Two issues with the Leads Dashboard were resolved:
  o Selecting a user group in the User Name field and clicking refresh was displaying no results in some cases.
  o The User Name field was visible when the Dispatched option was selected.

• An issue was resolved in which the Leads tab was available from campaigns for users who had call center rights, even if they did not have leads user rights.

SmartCampaigns

Solutions

• An issue was resolved in which the activity reason and subject were not displayed in the Mass Activity Creation dialog box when the user performed marketing options.

• A script error that occurred when the user ran packaged options for a campaign with the mass activity option selected was resolved.

• The ToolTip that displays when the user positions the mouse pointer over the New ‘Marketing Campaigns’ record button was changed to New ‘Marketing Campaign’ record.

• An issue was resolved in which changes to the Use default letter printing options option on the Handling Options content link of a campaign were not saved.

• An issue that occurred when the Type and Sub-Type fields on a campaign’s Handling Options content link were blank was resolved. When handling options were performed as defined in the campaign, the processing was being cancelled.

• A script error that occurred when the user clicked the Marketing Options button after running certain Dynamic Reports was resolved.

• An issue that occurred when the user assigned a system marketing campaign to a lead was resolved. When the Leads tab was accessed from the system campaign, the campaign displayed for the lead was different on the List and Detail content links. This occurred if the system campaign had the same campaign ID as a local office campaign.

• A script error involving campaigns that prompt the user to specify handling options was resolved. The error occurred when the user created an opportunity and selected the campaign.
Summary of Changes from SmartOffice® v6 Build 2325 to v7 Build 2730

SmartEvents

Enhancements

- **Improved invitee tracking**: SmartEvents users now have more ways to track event invitees with the addition of a Source drop-down list and an Invitee Remarks field in the Invitee Details dialog box.

![Invitee Details](image)

These new fields are also available as columns when the user customizes the layout of the Invitees list.

- **Ability to add invitee notes**: On the Invitees, Registered and Attendees content links of an event, a New Invitee Note button was added to enable users to enter notes about invitees. In addition, the View Invitee Note button was added, and the previous View SmartPad Notes button was removed.

![Invitee History](image)

- **Detailed invitee notes**: When an invitee’s status changes, the entry created in the invitee’s notes includes the previous and new statuses. This creates a detailed record of an invitee’s history.

![Invitee History](image)
• **Export button added**: Users can now export the list of events to an Excel spreadsheet, comma-separated values (CSV) file, XML file or tab-separated file. The new Export List button is available from the expanded Menu list on the Events List.

![Export List button](image)

• **More columns available for Dynamic Reports**: To make Event Activity-category Dynamic Report more informative, the user can now choose columns from the Contact and Opportunity tables when customizing the report’s layout.

![List Layout Customization](image)
• **Advisor search option when inviting contacts**: An advisor option is now available in the Search Contacts dialog box when the user is inviting contacts to an event.

![Search Contacts dialog box with advisor option](image)

**Solutions**

• The missing title on the New Event page was added.

• An issue in which the letter-sending process was initiated inconsistently when the user invited contacts was resolved.

• An issue in which documents were not being posted to Event Templates was resolved.

• An issue with the Change Status dialog box was resolved. Including a large number of columns in the Invitees section for the Reschedule status was making the dialog box too large.

• Re-inviting an invitee from the Invitees content link of an event now properly changes the invitee’s status to Invitation Sent.

• On the event Detail content link, an issue was resolved in which the end date was saved without first being validated when it was entered before the start date.
• Two issues involving event merge codes were resolved:
  o Merge codes were expanding to display data from an event template instead of an event.
  o Several merge codes were not expanding.
• The Send E-mail button was removed from the event Documents content link to resolve a script error.
• An issue with inviting a contact to an event through Marketing Options was resolved. When the user selected the Apply Correspondence Default Options check box, the letter workflow functioned as if that option had not been selected.
• An issue was resolved with the Event Setup dialog box. When the user clicked the New ‘Venue’ record button while viewing the Venue List, the Event Setup dialog box became smaller and displayed scroll bars.
• An issue in which the Event Category drop-down list displayed options with incorrect values was resolved.
• An issue in which Event Notes were not editable once they were added was resolved.
• The options in the Event Status drop-down list on both the Event Search dialog box and the Event List have been made more consistent.
• An issue was resolved in which users without SmartEvents rights were unable to view activities assigned to them from an event.
SmartRecruiting

Enhancements

- **Direct candidate import**: It is no longer necessary to import a record as a contact or advisor record and then convert it to a candidate. The user can now import candidate records directly into SmartOffice using **Utilities > Data Import Wizard** with a comma-separated values (CSV) text file as the source. When creating an import setup in the wizard, select **Candidate Import** from the **Select the type of records to be imported** drop-down list.

![Add Import Definition](image)

- **Fields added to candidate/recruit search**: To enable users to perform more comprehensive searches for candidates and recruits, the following fields were added to the Search Candidates/Recruits dialog box: Nominator, City/State/ZIP Code, Phone #/E-mail and AlphaKey.

Solutions

- An issue with filter creation for Recruit Information-category Dynamic Reports was resolved. In the Apply List Filter dialog box, when the user selected the Type column, the **Enter Value** drop-down list did not contain the Candidate option.

- An issue with stages added to new positions was resolved. When the user created a new position and added a stage, then modified the stage, the stage was not being retained in the position.

- An issue in which the Minimize and Expand buttons were missing from the Recruiting Status Report - Monthly window was resolved.
SmartWholesaler

Solutions

- An issue with adding a fulfillment request from a contact’s Fulfillment content link was resolved. After the request was added and the user opened the request from the Item List, the Item field was blank.

- An issue in which newly entered filters were not displaying in filter lists was resolved.

SmartOffice Sync for Outlook/Lotus Notes

Enhancements

- **Improved ease of use**: To enhance speed and efficiency in completing tasks, several unnecessary prompts have been removed from SmartOffice Sync.

- **SmartResolve Duplicate for Lotus Notes sync**: This component, previously available for Outlook only, now enables Lotus Notes users to find and clean up duplicate contacts in the Lotus Notes address book before synchronizing.

- **Sync setup changes**: For export sync operations (SmartOffice to Outlook), the option *Prompt me to select a resolution* was disabled in the Conflict Resolution Settings section of the Sync Setup dialog box. Export sync now has only the **SmartOffice always overrides Outlook** option enabled and selected by default.

QuickSync for Outlook/Lotus Notes

Enhancements

- **Support for Lotus Notes**: Lotus Notes users who want to synchronize individual contacts and activities between SmartOffice and Lotus Notes can now do so with the introduction of QuickSync for Lotus Notes.

- **Delete record feature**: Users can now select whether deleting an activity in one program should also delete the corresponding record in the other program. Activity deletion options are available in the Activity Addition Options dialog box (from Outlook, click the Options drop-down on the QuickSync toolbar and then select Activity Addition Options).
SmartOffice Utilities

Enhancements

General

Silent upgrades: To make the installation of SmartOffice Utilities updates less intrusive, a new upgrade process was introduced. If a new version of SmartOffice Utilities is available, and if the user has no office programs running, the upgrade now takes place behind the scenes without displaying the installation wizard.

SmartMail for Outlook/Lotus Notes

- **Contact creation during posting**: Users can now link a new e-mail recipient with an existing SmartOffice contact or create a new contact in SmartOffice based on an e-mail address while posting a message.

- **Multiple e-mail message posting**: Instead of having to post one e-mail message at a time, users can now select multiple e-mail messages to post.

- **Multiple e-mail posting workflows**: With this enhancement, users no longer have to wait for one e-mail posting workflow to finish before accessing Outlook or beginning another posting workflow.

- **Ability to post without signing in to SmartOffice**: Users can now post an e-mail message to a SmartOffice contact even if they are signed out of SmartOffice or do not have SmartOffice open.

- **Intelligent e-mail posting to pending cases**: SmartOffice Sync now searches for a pending case ID in the e-mail message’s subject line to determine which pending case the message should be posted to.

- **New e-mail address option for posting**: A new option labeled *Automatically add recipient’s e-mail address to contact when posting an e-mail* was added to the Advanced Posting Options dialog box. When this option is selected, the user’s e-mail address and those of the recipients are added to the selected contacts during the posting process. By default, this option is cleared.

![Advanced Posting Options](image-url)
• **Option to display/hide attachment privacy option**: A new option in the SmartOffice Configuration Tool makes it possible to hide the *Mark e-mail and attachment(s) as Private in SmartPad* option in the Posting Details dialog box. In the Configuration Tool, select `devcpp` from the side menu and look for the `showPrivateCheckbox` field. Enter 0 in the field to hide the attachment privacy option or 1 to display it.

• **Ability to link child informal cases**: Previously, only parent formal and informal cases could be linked from the Posting Details dialog box. Now, the user can also link child informal cases if the case’s Detail content link is displayed in SmartOffice.

**SmartLink for Correspondence**

**Improved performance for correspondence workflows**: Users can post correspondence more quickly and efficiently as a result of several improvements to Mass Correspondence. Although the workflow remains unchanged, the processing of Mass Correspondence now occurs in the background, enabling the user to navigate to other areas of the system while processing takes place. Letter preview and printing are also faster.

**SmartOffice Download Manager**

• **FTP downloads of installations**: Download Manager now downloads software installations from E-Z Data’s FTP sites instead of the SmartOffice server. This reduces the load on the SmartOffice server and improves the performance of SmartOffice.

• **Faster downloads based on location**: To increase the speed with which SmartOffice Utilities are downloaded, the Download Manager now automatically selects the nearest download site based on the user’s geographic location.

**Solutions**

**SmartLink for Windows Explorer**

For a contact from a child office, posted documents are now correctly displayed in the Document list as well as in the SmartPad when Enterprise View is turned on.

**SmartOffice Folder Watch**

An issue was resolved in which users were unable to shut down their computers when Folder Watch was running in the Windows system tray.
SmartOffice Mobile PC

Enhancements

**Vista 64-bit support**: SmartOffice Mobile PC is now compatible with 64-bit editions of Windows Vista.

Solutions

- An issue was resolved in which modifying the e-mail information for a case shared contact in SmartOffice Mobile PC was causing a “node is null” error during a subsequent synchronization. In addition, the record was not being modified in SmartOffice or SmartOffice Mobile PC.

- An issue was resolved in which deleting the value in the Referred By field of a contact was not removing that value from the corresponding contact in SmartOffice during a subsequent synchronization.

- An issue with policies not being downloaded is some cases was resolved. The issue occurred when the contacts associated with those policies were added to the set used for subsequent sync operations.

- An issue was resolved in which SmartPad entries created in SmartOffice were not synchronizing to SmartOffice Mobile PC in certain situations.

- A sync issue that occurred when the Primary Contact field of a business was modified in SmartOffice was resolved. The modification was not being reflected in the Primary Contact field in SmartOffice Mobile PC, even thought clicking the Primary Contact hyperlink in SmartOffice Mobile PC was displaying the updated information.

SmartIntegrator

Enhancements

- **Agency module exposed to SmartIntegrator**: The following tables are now exposed for SmartIntegrator in order to bridge the gap specified by Penn Mutual: ADVCONTRACT, BROKERDEALER, CECREDITS, CECREDITSDETAIL. Also, the AgentID on Advisor license is now exposed.

- **Alert Message now available for Data Aggregation Processing**: This change was introduced for reporting purposes. The report includes Statics reports and a link for the Reconciliation Tool.

- **Expanded Account Type field**: The Account Type field was expanded to handle long DST Account Type descriptions.

- **Single Sign On enhancement**: Token based authentication was implemented to enable Single Sign On with ING and other partners.

- **Closed account support**: SmartIntegrator Method now supports closed accounts.
• **Integration Services buttons**: Integration Services are available as individual buttons on respective modules.

• **Primary advisor flag**: A flag was added to control the primary advisor for accounts.

• **Variable annuity support**: SmartIntegrator Method now supports variable annuity data (VA data provider DST/Security America, etc.)

• **Centralized integrations subscription management**: The user can now view and subscribe to all integrations from a central location. Select **Plug-Ins** from the expanded **Utilities** menu to open the Services for [User] dialog box. Then click the **Edit Current / Add Available Services** hyperlink to open the Subscription Management dialog box.

![Subscription Management - Daniel Odell](image)

This dialog box displays integrations the user is subscribed to, available integrations the user can subscribe to and integrations the user can purchase.

• **ByAllAccounts automatic price creation**: SmartIntegrator now supports automatic price creation for ByAllAccounts data when price information is not provided.

• **Adapter access from SmartOpportunities**: SmartIntegrator adapters are now accessible from the SmartOpportunities module.
• **Context-based Integration Services available as buttons**: The following Integration Services are now available directly from the Menu > Integrations menu. It is no longer necessary to select Plug-Ins to access these integrations:
  - Albridge – SmartLink
  - Application Upload Prudential – SmartLink
  - Mass Mutual PAAR – SmartLink
  - MoneyGuidePro – SmartLink
  - Prudential 2-Way Requirements – SmartLink
  - WinFlex Web – SmartLink

• **New columns exposed for HSBC application manager**: The following properties were added to the SmartIntegrator catalog for HSBC application manager: Contact_CreatedBy, Contact_ReviewDate, NewBusiness_Contact, InterestParty_ProdRiskClassID, SecurityMaster_ProductRiskClasses.

• **SmartPad search**: SmartPad entries are now searchable through SmartIntegrator.

• **Simplified side menu access to integrations**: To minimize mouse clicks, many Integration services have been moved directly under a new Integrations item in the SmartOffice side menu. Previously they were located under Utilities > Plug-Ins.

**Solutions**

• DAS now imports the correct Price Factor and the security type if the data in SmartOffice is Misc.

• Invalid security data (i.e., no SYMBOL or CUSIP) is no longer imported into SmartOffice.

• DAS ByAllAccounts now imports more accurate information for ETF securities.

• An issue with transaction data import from ByAllAccounts was resolved.

• If there are no records to process, the status is now set to Error and an alert e-mail message is sent to E-Z Data technical support.

• An issue was resolved in which the Data Provider field displayed the service name instead of the data provider name (e.g., Pershing, DST, etc.).

• SmartLink for Insurance Brokers no longer transfers requirement notes from the Provider (BGA) SmartOffice to the Consumer (Advisor).

• Algorithm issues with DataXchange Online client-side components were resolved.
Pending Case Download

Enhancements

- **Usability improvements**: Enhancements were made to improve the usability of Pending Case Download and Side-by-Side Processing, including the addition of Abort All and Mark Reviewed buttons.

- **Buttons rearranged for improved ease of use**: Side-by-Side buttons have been relocated and/or relabeled to be clearer to users.

Solutions

- An issue with matching a home office case to an existing agency case was resolved. Previously, the user was unable to search across different carriers and could only search in the default carrier.

- Fields that were not displaying consistently on new agency cases now display properly. The fields are Age, Title, State, SS#, Plan and Modal Premium

- Pending Case Download data is no longer processed for disabled offices.

Service Provider

Solutions

An issue with URLs received as part of a status update using the Service Provider Interface was resolved. URLs were not properly formatted in the requirement notes created when statuses are received.