



Dynamic Report Download

You can download dynamic reports and sample form letters from the SmartOffice Dynamic Report Download Page:

<http://www.ebixcrm.com/support/smartofficedownload.shtml>

To Download a Dynamic Report:

- From the Dynamic Report Download page, click the **download** for the selected dynamic report link.
- When the file download window opens, click **Save As** and select a location on your computer to store the .zip file.
- The .zip file contains a folder with an .xml file that can be loaded into SmartOffice. The file may also contain .rtf documents that can be opened in Microsoft Word.
- To extract the contents of the .zip file, right-click on the file. Then select **Extract All**. Click **Next**.
- Then select the location to extract the contents to. Click **Finish**.

To Import the Dynamic Report into SmartOffice:

- Select **Reports** in the Side Menu.
- Then select **Dynamic Reports**.
- Without entering any search criteria, click the **Search** button.
- From the Dynamic Report List, click **Menu**.
- From the Menu, click **Import – Dynamic Report Definition**.
- Click **Browse**.
- Find and select the Dynamic Report .xml file from your computer.
- With the file selected, click **Open**. The path to the file is displayed in the Select File field.
- Click **OK** to add the Dynamic Report to SmartOffice.

To Import the Sample Template Letter into SmartOffice:

- Select **Setup** in the Side Menu.
- Then select **Document Administration**.
- Click the **New** button to create a new letter template.
- In Step 1, select **Letter Template**.
- In Step 2, Select **From a location outside of SmartOffice**.

- Click **Browse** and select the letter template located on your computer.
- Click **Open**.
- Then click **Create**.
- From the Microsoft Word letter template, click the **SmartOffice** tab.
- From the SmartOffice tab, click **Save & Close**.
- Give the template a name.
- Add **Additional Info** if needed. Click **Save**.

Using the Dynamic Report:

- Select **Reports** in the Side Menu.
- Select **Dynamic Reports**.
- In the Search Dynamic Reports window, enter search criteria in the **Report Name** field and click **OK**.
- A list screen will open with the dynamic report on display.
- To run the report, click the **Report Name** link.

Using the Sample Template Letter:

- After running the dynamic report, select records in the results and click the **Correspondence** button.
- From the Correspondence Wizard, select **Tagged Records** and click **Next**.
- In the Select a Method section, select **Print Letter** and click **Next**.
- In the Template Name field, enter the name of the sample template letter.
- Select the letter and click **Next**.
- Select your printing options and preferences and click **Next**.
- Click **Preview / Edit & Print**.