

# Introduction to

# SmartOffice<sup>®</sup>

**Jim Graddon**

GM, Canadian Operations

**Morgan Underwood**

Vice President, Marketing

**Eric Burgess**

Associate Director, Product Management

# Agenda

AGENDA		
Wednesday, 2 Sep, 2009	Topic	Time
Introduction to SmartOffice 7	<b>Welcome and Introduction</b> <i>Jim Graddon</i> <i>GM, Canadian Operations</i>	5 minutes
	<b>Welcome to SmartOffice v7</b> <i>Morgan Underwood</i> <i>Eric Burgess</i>	35 minutes
	<b>Questions and Answers</b>	20 minutes

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Jump to:

	Topics	Replies	Views	Last Post
	<a href="#">Usage Log</a>	1	191	Thu Aug 13, 2009 8:56 am Morgan Underwood
	<a href="#">webinar v7 topic - Calendar timed view</a>	0	214	Fri Aug 07, 2009 11:40 am Kimberly Pinney
	<a href="#">webinar v7 question - sending Correspondence</a>	0	164	Fri Aug 07, 2009 11:32 am Kimberly Pinney
	<a href="#">webinar v7 question - cost to upgrade?</a>	0	161	Fri Aug 07, 2009 11:30 am Kimberly Pinney
	<a href="#">webinar v7 question - CSV import</a>	0	139	Fri Aug 07, 2009 11:29 am Kimberly Pinney
	<a href="#">webinar v7 question - mass mailing letter modification</a>	0	129	Fri Aug 07, 2009 11:28 am Kimberly Pinney
	<a href="#">webinar question - Internet Explorer 8</a>	0	147	Fri Aug 07, 2009 11:26 am Kimberly Pinney
	<a href="#">webinar v7 question - changes to SmartOpportunities</a>	0	129	Fri Aug 07, 2009 11:24 am Kimberly Pinney
	<a href="#">webinar v7 question - multiple contact's open at once</a>	0	140	Fri Aug 07, 2009 11:22 am Kimberly Pinney
	<a href="#">webinar v7 question - Calendar Reports on Home Page</a>	0	67	Fri Aug 07, 2009 9:56 am Kimberly Pinney
	<a href="#">webinar v7 question - posting Bcc E-mail</a>	0	64	Fri Aug 07, 2009 9:49 am Kimberly Pinney
	<a href="#">webinar v7 topic - Google Maps</a>	0	60	Fri Aug 07, 2009 9:46 am Kimberly Pinney
	<a href="#">webinar v7 topic - refresh data</a>	0	59	Fri Aug 07, 2009 8:54 am Kimberly Pinney
	<a href="#">webinar v7 question - Automatic log out time period</a>	0	63	Fri Aug 07, 2009 8:36 am Kimberly Pinney
	<a href="#">webinar v7 topic - My Favorite Users</a>	0	51	Fri Aug 07, 2009 8:32 am Kimberly Pinney
	<a href="#">Add Title to Calendar</a>	-	--	Mon Aug 03, 2009 9:50 am



# Important Update Information

- > SmartOffice upgrades planned on
  - 9/4 – Canada2
  - 9/11 – Canada1
- > Prior to the Update
  - Mobile Mode
- > After the Update
  - Clear your cache prior to entry
  - Sign in to SmartOffice before Outlook, Word, etc.

# Topics to Cover

- Home Page Dashboards
- History Tab on the Side Menu
- Quick Action Corner
- Menu button options
- Drop down search
- In list filters
- Performance Improvements
- Calendar

# Home Page Options and Streamlined Navigation in SmartOffice v7

# Calendar and Activities in SmartOffice v7



# Increased Visibility in Day and Week Views

SmartOffice by E-Z DATA

Search: Contact/Business | Enter Name (Last, First) | Search | Select type... | Enterprise View: Off | Home | Settings | Logout | Help/Training

Calendar for: Daniel Odell (Show Other Users' Calendar)  
Monday February 4, 2008

Navigation | History

Calendar

People & Companies

Sales & Marketing

Reports

Event Management

Insurance

Investments

Utilities

Setup

Activity Type

- Meeting
- Personal
- Project
- To Do
- Call
- Appointment

Day | Week | Month | Agenda (SHIFT+L) | Overdue Projects | Unfinished Activities | User Group Scheduling

Calendar

8 am	<input type="checkbox"/> 08:00AM-08:30AM (C) Iris Adams Ph: (626) 676-7345	<input type="checkbox"/> (C) ABC Manufacturing Ph: (626) 585-8989
9 am	<input type="checkbox"/> 09:00AM-09:30AM (M) Follow-up meeting to discuss the success rate of marketing campaign and strategies.	
10 am	<input type="checkbox"/> (T) William Adams Ph: (626) 512-1231 Obtain Case Material	
11 am	<input type="checkbox"/> 11:30AM-02:00PM (A) Karina Arias Business appointment with Karina	
Noon		
1 pm		
2 pm	<input type="checkbox"/> (T) Seminar Preparation Office Prepare Presentation Materials for Estate Planning Seminar on March 17th, 2008	
3 pm		
4 pm	<input type="checkbox"/> (C) Brett Bantaculo Close Negotiation	
5 pm		
6 pm		
7 pm		
8 pm		
9 pm		
10 pm		
11 pm		

Tasks

Type	Contact Name	Full Phone	Subject/Descr
<input type="checkbox"/> Call	Anderson, John	(626) 555-9807	Initial Call for the Disability Cross Sell Campaign
<input type="checkbox"/> Appointment	Arias, Peter	(928) 555-4444	test subject by j yang

Records Shown: 2 Total Records: 2

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# Simplified Activity dialog box

The screenshot shows a dialog box titled "SmartOffice -- Webpage Dialog" with a close button (X) in the top right corner. The dialog is titled "Activity" and contains the following fields and controls:

- Activity for :** Radio buttons for "Calendar" (selected), "Tasks", and "All Day Event".
- Name:** A text input field.
- Type:** A dropdown menu currently set to "Appointment".
- Subject:** A text input field.
- Start Time \*:** A date field set to "01/29/2008" and a time dropdown set to "09:00AM".
- End Time \*:** A date field set to "01/29/2008" and a time dropdown set to "09:10AM".

At the bottom of the dialog are three buttons: "Save & Close", "Comprehensive", and "Cancel". Below the buttons is the copyright notice: "© 2000-2008 E-Z Data, Inc. All rights reserved."

# User Profile - Calendar Time Internal

## User Preferences - Daniel Odell



User Accounts | **User Preferences**

Basic Info | **Calendar Options** | Activity Options | Policies/Investments | Letter Printing/E-mail Options | Time Zone | SI Authentication |

**Calendar Options**

- Always navigate to Today when the Calendar is opened
- Display other Users' Tasks on my Calendar
- Calendar Time Interval: **30 minutes** (dropdown menu open showing 30 minutes and 1 hour)

**Calendar View Options**

- Show to other users
- Only to users with proxy relationships
- Select users

**Task View Options**

- Show to other users
- Only to users with proxy relationships
- Do not show to other users
- Select users

**Color Activities in Calendar Views By**

- Type
- Sub-Type
- When viewing multiple users? activities, color by Participants instead of above.

**Activity Details displayed in Calendar Week and Month**

- Show Location
- Show Contact's Full Name
- Show Subject/Description

**Do Not Display**

- All Day Events
- Tasks in the Calendar Day
- Tasks in the Calendar Week
- Tasks in the Calendar Month

**Quick Action Corner Calendar View Buttons (select 2)**

- Month
- Week
- Day
- Agenda

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# User Profile - Default Participants

## User Preferences - Daniel Odell



User Accounts | **User Preferences** | Basic Info | Calendar Options | Activity Options | Policies/Investments | Letter Printing/E-mail Options | Time Zone | SI Authentication

**Default Activity/Task Creation Options**

- Prompt if an Activity Participant has a schedule conflict
- Do not prompt for Activity Confirmation Letter
- Disable Audio Activity Reminder

Reminder before Call: [Dropdown]

Reminder before Appointment: **15 Minutes** [Dropdown]

Start Time for New Appointments: **08:00AM** [Calendar Icon]

Calendar Activity - Type: **Appointment** [Dropdown]

Task - Type: **Call** [Dropdown]

Activity Duration: **30 Minutes** [Dropdown]

**Default Activity Participants**

- Current User Only
- Primary Advisor
- Primary Advisor and Current User

**Default Task Participants**

- Current User Only
- Primary Advisor
- Primary Advisor and Current User

**Task AutoMove / Unfinished Activities**

AutoMove will move Tasks not marked done to the current day. How far in the past should SmartOffice look? **1 Day** [Dropdown]

Note: The days drop-down list also determines what displays in *Unfinished Activities*.

**Task types to be moved forward**

- Call
- Appointment
- To Do
- Personal
- Meeting
- Project

**Activity Outcome / Dialer Options**

- Disable default Activity Tracking for new activities
- Assume all calls are outgoing
- Do not navigate to the Contact Detail Page on Phone Dial
- Do not show the Phone List while using the Dial button.

**Activity Outcome Appointment/Call Workflow**

- Standard
- Comprehensive

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# Questions and Answers