

# SmartLink for PaperClip

## Track and manage client documents with ease

To manage your business effectively, you need to track and manage every document associated with every one of your clients. For users of SmartOffice and PaperClip, that task is easier than ever.

Using SmartLink for PaperClip, an add-on module to SmartOffice®, you can easily send data directly from SmartOffice to PaperClip — without having to re-enter or re-scan data. In addition to saving you time, this automated process makes it easier to locate documents and forms stored in PaperClip by linking them directly to the appropriate contact record in SmartOffice.



## Work smarter, work faster

Compatible with both the web and desktop versions of PaperClip, SmartLink for PaperClip allows you to launch PaperClip directly from within SmartOffice. The link automatically takes you from the open

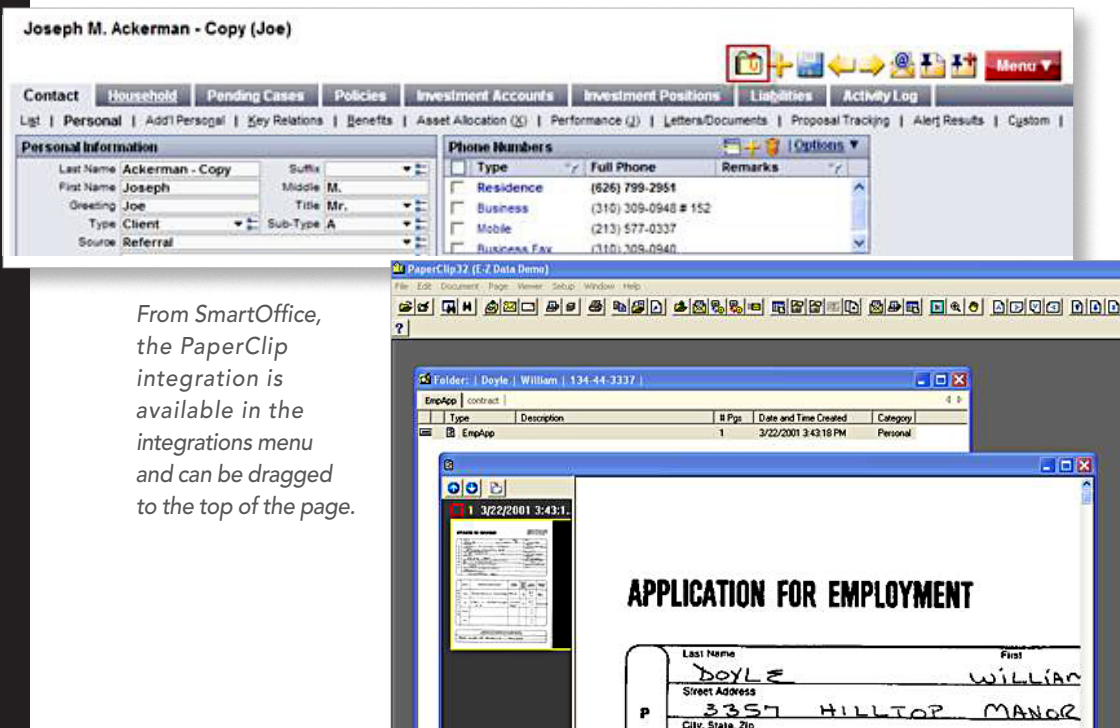
SmartOffice contact record to the corresponding folder in PaperClip. If a PaperClip folder for the contact does not exist, the system will ask if you would like to create a folder for the specific contact. The link reduces the risk of error by minimizing data entry, automatically indexes the folder and associated files, and helps you work faster by reducing the number of clicks required to track and manage client documents.

## DATASHEET

- *Work faster using SmartOffice and PaperClip simultaneously*
- *Link PaperClip documents directly to each pending case*
- *Automatically create new folders in PaperClip for policies, pending cases, advisors, and contacts*

# SmartLink for PaperClip provides these valuable benefits:

- **Ease of use** simple navigation and straightforward integration requires very little training, making it easy to start using the link right away.
- **Faster workflow** reduces the amount of data entry and the number of clicks required to navigate between the two systems.
- **Seamless data exchange** exchange between SmartOffice and PaperClip reduces the risk of error by eliminating the need to re-enter existing client data.
- **Direct navigation** takes the user straight from their position within SmartOffice to the corresponding document folder in PaperClip.
- **Automatic indexes** create document storage locations, making it easier than ever to manage documents from either system.



From SmartOffice, the PaperClip integration is available in the integrations menu and can be dragged to the top of the page.

From within PaperClip, the user can navigate through document indexes and open documents that have been scanned in for a particular SmartOffice contact.

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