SmartLink for Docupace

Streamlining your paperless office

Users of Docupace's web-based document management and imaging solution and SmartOffice can streamline advisor workflow using SmartLink for Docupace. This add-on module to SmartOffice® provides users with seamless access to Docupace content — including all documents, forms, and letters — right from the SmartOffice home page.

When working in SmartOffice, users can launch the Docupace application using the SmartLink for Docupace integration button in SmartOffice. From any Smart-Office contact screen, Docupace will automatically log the user in and take them to the associated contact folder. When not in a specific contact-related record, clicking on the SmartLink button in the SmartOffice utilities sidebar menu takes the user directly to Ducupace's main desktop view.

SmartLink for Docupace makes it easier than ever to leverage electronic documents and scanned paper-based documents stored in Docupace's online file system and associate them with a unique SmartOffice contact. The integration eliminates the need to re-enter data in SmartOffice or log in to multiple applications, significantly reducing the number of clicks required to complete each task and streamlining the overall advisor workflow.

DATASHEET

- Easily manage client activity and track stored documents
- Access Docupace data right from the SmartOffice homepage
- Eliminate redundant data entry and ensure consistency of contact records



SmartLink for Docupace provides these valuable benefits:

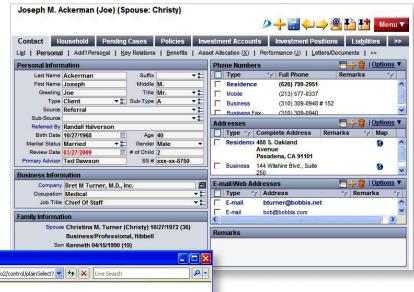
- **Ease of Use:** The SmartLink integration eliminates the need for training on multiple applications by delivering access right from the SmartOffice home page.
- > Single Sign On: Provides access to both SmartOffice and Docupace content for any given contact without having to re-enter login information in the separate applications.
- > Streamlined Workflow: Directs the user straight to the corresponding client folder from SmartOffice, reducing the number of clicks required for each task and elminating redundant data entry.
- Pre-configured integration: Makes it easy to get the SmartLink in place and start accessing Docupace content right away.

The SmartLink for Docupace button is displayed at the top of the contact record view. (The button appears in the utilities sidebar menu when in a non-contact module screen.)

Position details - Windows Internet Explorer

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The Docupace client folder associated with the SmartOffice contact is launched automatically.

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