

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 SmartOffice 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 Docupace'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 eliminating 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.)

Joseph M. Ackerman (Joe) (Spouse: Christy)

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[List](#) | [Personal](#) | [Add1 Personal](#) | [Key Relations](#) | [Benefits](#) | [Asset Allocation \(X\)](#) | [Performance \(U\)](#) | [Letters/Documents](#) | [>>](#)

Personal Information

Last Name: Ackerman | Suffix: | First Name: Joseph | Middle: M. | Greeting: Joe | Title: Mr. | Type: Client | Sub-Type: A | Source: Referral | Sub-Source: | Referred By: Randall Halverson | Birth Date: 10/27/1968 | Age: 40 | Marital Status: Married | Gender: Male | Review Date: 03/27/2009 | # of Child: 2 | Primary Advisor: Ted Dawson | SS #: xxx-xx-8750

Business Information

Company: Bret M Turner, M.D., Inc. | Occupation: Medical | Job Title: Chief Of Staff

Family Information

Spouse: Christina M. Turner (Christy) 10/27/1972 (36) Business/Professional, Hibbel
 Son: Kenneth 04/15/1990 (19)

Phone Numbers

Type	Full Phone	Remarks
<input type="checkbox"/> Residence	(626) 799-2951	
<input type="checkbox"/> Mobile	(213) 577-0337	
<input type="checkbox"/> Business	(310) 309-0948 # 152	
<input type="checkbox"/> Business Fax	(310) 309-0940	

Addresses

Type	Complete Address	Remarks	Map
<input type="checkbox"/> Residence	488 S. Oakland Avenue Pasadena, CA 91101		
<input type="checkbox"/> Business	144 Wilshire Blvd., Suite 250		

E-mail/Web Addresses

Type	Address	Remarks
<input type="checkbox"/> E-mail	bturner@bobbis.net	
<input type="checkbox"/> E-mail	bob@bobbis.com	

Remarks

Position details - Windows Internet Explorer

http://www.docupaceinc.com:8084/financialdemo2/control/plainSelect? Live Search

Client Folder Info

Actions	Household	Last Name	First Name	Entity Name	SSN/TIN	Rep #	First Name	Last Name	City	State	BD	Business Type
Barcode Edit Del		ACKERMAN	JOSEPH		XXXXX8750	XLJ	TEST	REP		FSC		BD/RIA
						4G4	RICK	HARPER		FSC		

Folder content:

Client Subfolder

Actions	Subfolder Type	Registration Type	Product Type	Sponsor/Custodian	Other Description	Account #	Last Note	Rep #	First Name	Last Name	City	State	BD	Business Type
Content Edit Del General								XLJ	TEST	REP		FSC		BD/RIA
								4G4	RICK	HARPER		FSC		

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

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