

SmartLink for PaperClip
User Guide

SmartOffice®



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Introduction

This guide outlines the use of the PaperClip Integration module for SmartOffice® version 3.5.9 and higher. The integration of this application involves importing data from SmartOffice to the PaperClip software. This module is available as a separate add-on to SmartOffice.

For information on purchasing the PaperClip Integration module, please contact the E-Z Data Sales Department at (800) 777-9188.

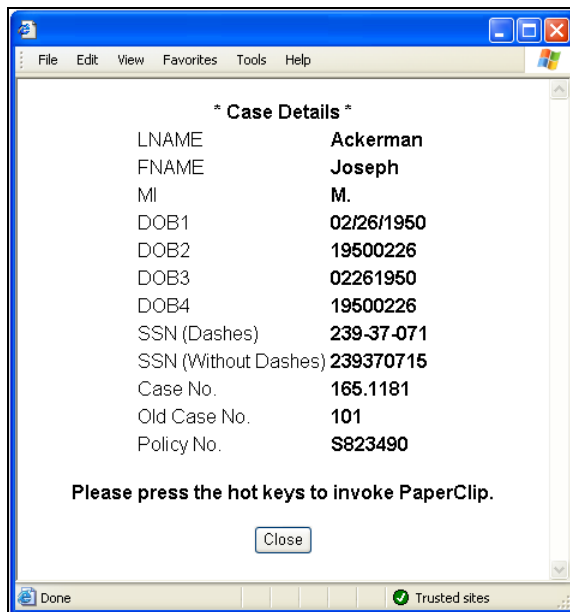
For more information on the PaperClip application, please visit www.paperclip.com.

Requirements for the PaperClip Integration

- PaperClip software must be installed on the computer from which the integration will run
- SmartOffice v3.5.9 or higher
- SmartPolicies license (optional)
- SmartCaseManager license (optional)
- PaperClip integration rights

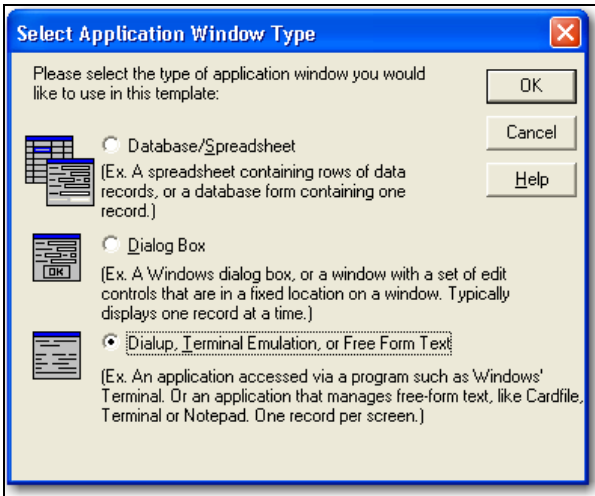
Using the PaperClip Integration

1. Open the PaperClip software.
2. In the Policy, Pending Case, or Contact module, click the **PaperClip** button from the SmartOffice Advisor Detail tab. A dialog box opens containing the information to be added to PaperClip.

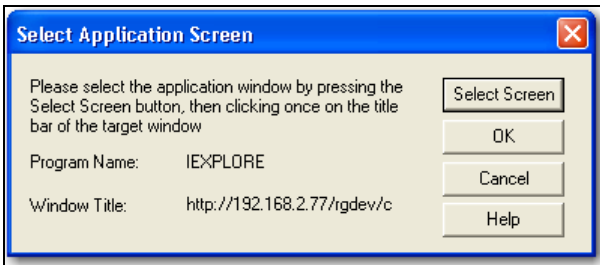


3. Press the **ALT + F10** keys to automatically copy the index values to PaperClip and close the dialog box.
4. Click the **PaperClip** button again.

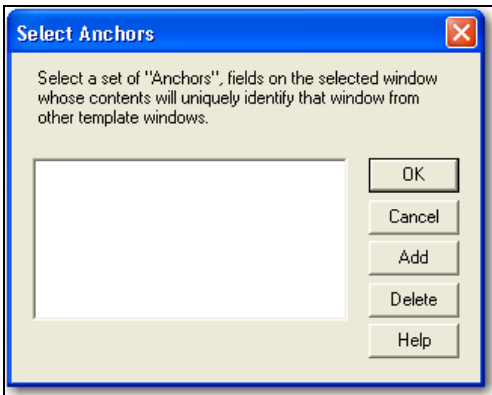
5. With both SmartOffice and PaperClip open, press the **CTRL + F2** keys to open the Select Application Window Type dialog box.



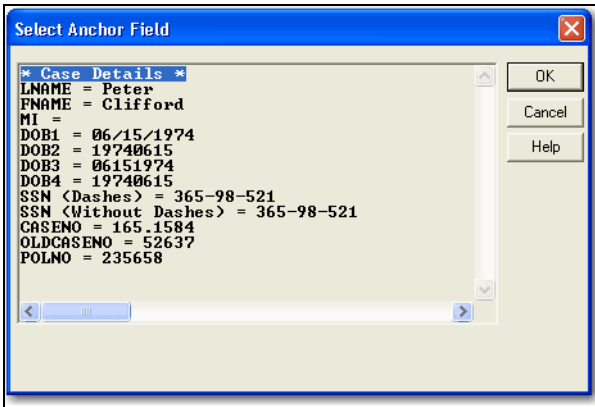
6. Select the **Dialup, Terminal Emulation, or Free Form Text** option and then click the **OK** button to open the Select Application Screen dialog box.



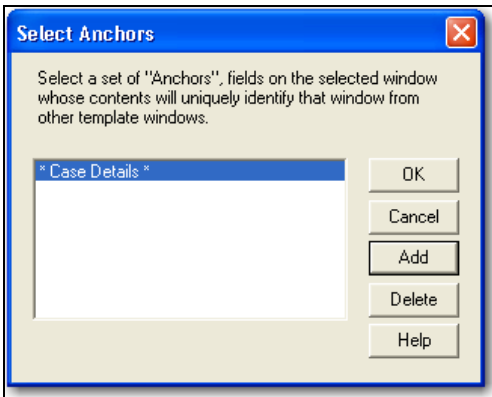
7. Click the **OK** button to open the Select Anchors dialog box.



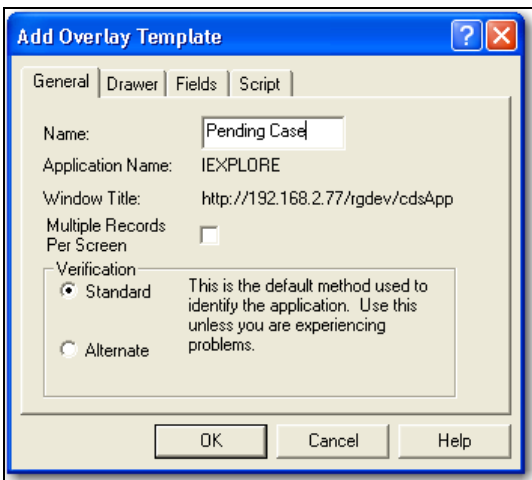
8. Click the **Add** button to open the Select Anchor Field dialog box.
9. Highlight the anchor that is surrounded by asterisks at the top of the list (e.g., *Case Details*) and then click the **OK** button.



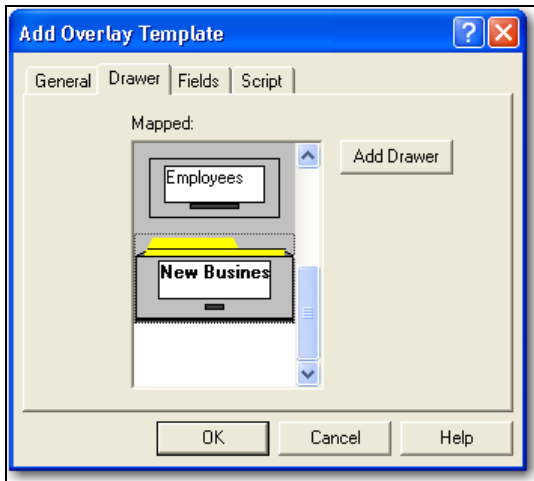
10. From the Select Anchors dialog box, click the **OK** button.



11. From the Add Overlay Template dialog box, enter the appropriate Name and then click the **Drawer** tab.



12. Select the drawer to which the data should be imported and then click the **Fields** tab.

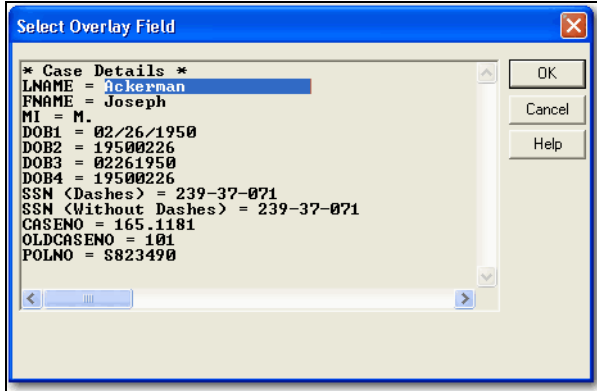


13. Click the **Add** button to open the Select Overlay Field dialog box.

Map the data from the drawer you previously created by placing the cursor at the beginning of the text (excluding the label) and then use the **Shift + Right Arrow** keys to mark the spaces that were defined in the drawer.

Note: Recall how long the different characters should be as defined when the drawer was created. For example, if you defined the last name to have 20 characters, use the **Shift + Right Arrow** keys to mark off 20 spaces as shown below.

Important: Only highlight the value (e.g., Ackerman and the respective number of characters).

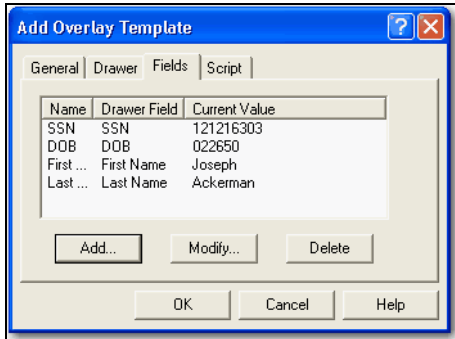


Repeat this process for all of the selected fields and then click the **OK** button.

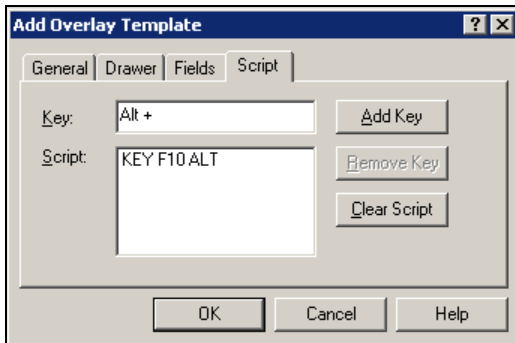
14. From the Add Overlay Field dialog box, specify the Related Drawer Field and Title information and then click the **OK** button.



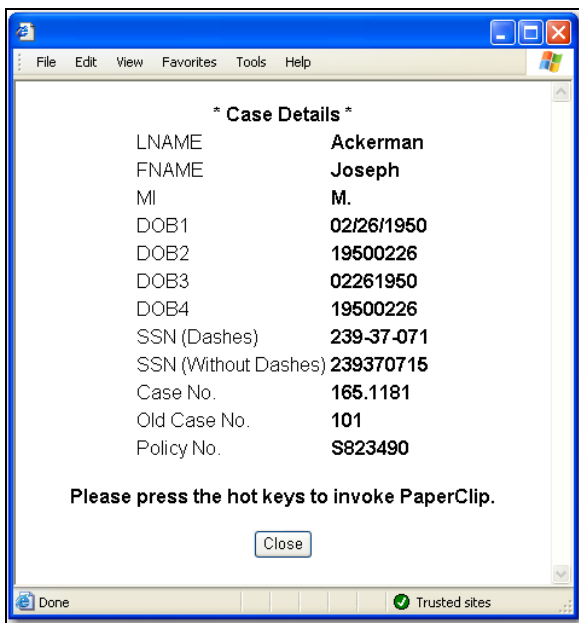
15. The Fields tab displays once you have selected and mapped all of the fields. Click the **Script** tab.



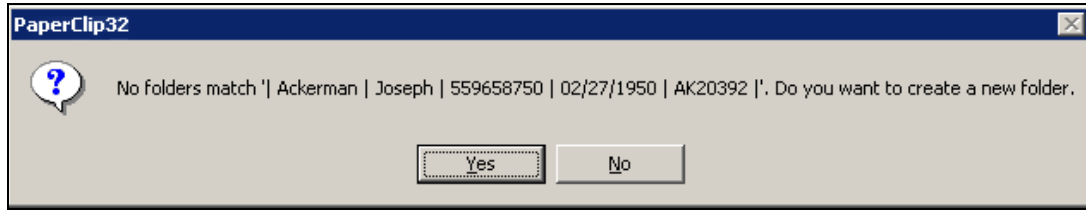
16. To delete what is in the Script section, highlight the script and then click the **Clear Script** button.
17. The cursor will then flash in the Key field. Press the **ALT + F10** keys and then click the **Add Key** button to display the information in the Script area.



18. Click the **OK** button and then open SmartOffice.
19. With the original dialog box open, press the **CTRL + F3** keys.



20. If the information is not in PaperClip, a prompt will display. Click the **Yes** button to create a new folder.



21. The information is then transferred to the PaperClip software.

Index Values

The following are the available fields that can be indexed from SmartOffice to PaperClip.

Contact

Label	Description	SmartOffice Field
LNAME	Contact Last Name/Business Name	Last Name Business Name
FNAME	Contact First Name	First Name
MI	Contact Middle Initial	Middle Name
DOB1	Contact Date of Birth Format: mm/dd/yyyy Example: 02/06/2006	Birth Date
DOB2	Contact Date of Birth Format: yyymmdd Example: 19500206	Birth Date
DOB3	Contact Date of Birth Format: mmdyyy Example: 02061950	Birth Date
DOB4	Contact Date of Birth Format: yyymmdd Example: 19500206	Birth Date
SSN (Dashes)	Contact Social Security Number Example: 123-45-6789	SS #
SSN (Without Dashes)	Contact Social Security Number Example: 123456789	SS #

Advisor

Label	Description	SmartOffice Field or Value
LNAME	Advisor Last Name/Agency Name	Last Name
FNAME	Advisor First Name	First Name
MI	Advisor Middle Initial	Middle Name
DOB1	Advisor Date of Birth Format: mm/dd/yyyy Example: 02/06/2006	Date of Birth
DOB2	Advisor Date of Birth Format: yyyymmdd Example: 19500206	Date of Birth
DOB3	Advisor Date of Birth Format: mmdyyy Example: 02061950	Date of Birth
DOB4	Advisor Date of Birth Format: yyyymmdd Example: 19500206	Date of Birth
SSN (Dashes)	Advisor Social Security Number Example: 123-45-6789	SS #
SSN (Without Dashes)	Advisor Social Security Number Example: 123456789	SS #
AMSAGNM	Unique AMS assigned agent reference number	Advisor ID
OLDAMSAGNM	Unique AMS agent reference number retained from conversion from previous AMS	Alphakey (custom field)
AMSAGNM (Cndt)	This conditional index will first look to see if there is a value in the custom field originally labeled Alphakey . <ul style="list-style-type: none"> • If YES then the value is taken from the Alphakey field. • If NO then the value is taken from the Advisor ID field. 	Alphakey (custom field) – first Advisor ID – if Alphakey is blank

Pending Case/Policy

Label	Description	SmartOffice Field or Value
LNAME	Primary Contact's Last Name	Last Name
FNAME	Primary Contact's First Name	First Name
MI	Primary Contact's Middle Initial	Middle Name
DOB	Primary Contact's Date of Birth	Birth Date
DOB1	Primary Contact's Date of Birth Format: mm/dd/yyyy Example: 02/06/2006	Birth Date
DOB2	Primary Contact's Date of Birth Format: yyyymmdd Example: 19500206	Birth Date
DOB3	Primary Contact's Date of Birth Format: mmdyyy Example: 02061950	Birth Date
DOB4	Date of Birth Format: yyyymmdd Example: 19500206	Birth Date
SSN	Primary Contact's Social Security Number	Social Security Number
CASENO	Unique agency reference/case number, usually generated by Agency Management System (AMS)	Case Unique ID
OLDCASENO	Unique agency reference/case number retained from conversion from previous AMS	Case #
CASENO (Cndt)	This conditional index will first look to see if there is a value in the Case # field. <ul style="list-style-type: none"> • If YES then the value is taken from the Case # field. • If NO then the value is taken from the Case Unique ID field. 	Case # – first Case Unique ID – if Case # is blank
POLNO	Unique carrier key, could be application or policy number	Policy Number