

SmartPDA
User Guide

SmartOffice®



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Introduction

SmartPDA provides a great way to access your most important data while on the go. This module allows for direct access to your SmartOffice® database through a cellular-capable PDA phone without a separate installation or application being added to the device. SmartPDA is a portal to your existing data that provides quick, real-time viewing of Calendar, Contact, Wholesaler, SmartPad, Policy, Account Master, Positions, Opportunity, Key Relations, Pending Case, Advisor, Distributor, Leads, and Message Center records. SmartPDA does not require a separate installation as it works in the device’s microbrowser.

Note that SmartPDA works on Pocket PC® (Windows® Mobile®), BlackBerry®, and Palm® 650 or later. However, for the purpose of this documentation, we will display the screens from the BlackBerry. There will be slight differences in the screens and key strokes; however, the majority of the functionality is the same.

SmartPDA – Features





Online access to SmartOffice through the SmartPDA gives the user the ability to view and edit their most important data whenever they are out of the office, including calendar, contact, SmartPad, policy, account master, positions, opportunity, key relations, pending case status, advisor, and lead records. The real-time access ensures that the office staff is aware of any changes to the user’s calendar or other critical client information as they occur and eliminates redundant data entry.

Microbrowser Support eliminates the traditional boot-and-synch process, and gives the user the power of SmartOffice without a separate installation or application being added to their handheld device. Remote Access to changes in a user’s office calendar helps ensure that they will never miss another client appointment or waste their valuable time traveling to a canceled meeting.

Microbrowser Access to SmartOffice

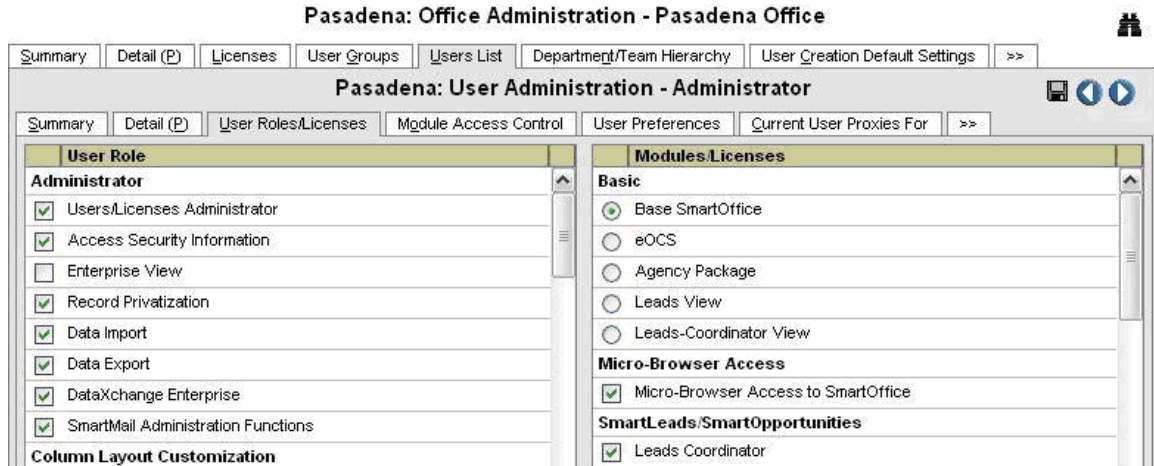
SmartPDA can be accessed using the microbrowser devices once the ‘Microbrowser Access to SmartOffice’ license is enabled from System Office (Office ID # 1). The number of Max Licenses that needs to be assigned for the ‘Microbrowser Access to SmartOffice’ license in a particular office will be based on the number of users who will be accessing SmartPDA in that office.

Pasadena: Office Administration - Pasadena Office

Summary	Detail (P)	Licenses	User Groups	Users List	Department/Team Hierarchy	User Creation Default Settings	>>
Licenses							
License Type	Maximum Licenses	Licenses in Use					
Investment Tracking Module	5	3					
Lead/Campaign Tracking & Management	5	3					
LeadsView	5	0					
Lotus Notes Integration Module	<input checked="" type="checkbox"/>	0					
Micro-Browser Access to SmartOffice	15	3					
Named User	20	14					
On Access Validation	<input checked="" type="checkbox"/>	0					
Opportunity Module	5	4					

Once the Microbrowser Access license is assigned, the user will be able to access SmartPDA using Web-enabled microbrowser devices.



Main Menu

After logging into SmartPDA, the Main menu displays the list of modules that the user can access using SmartPDA.

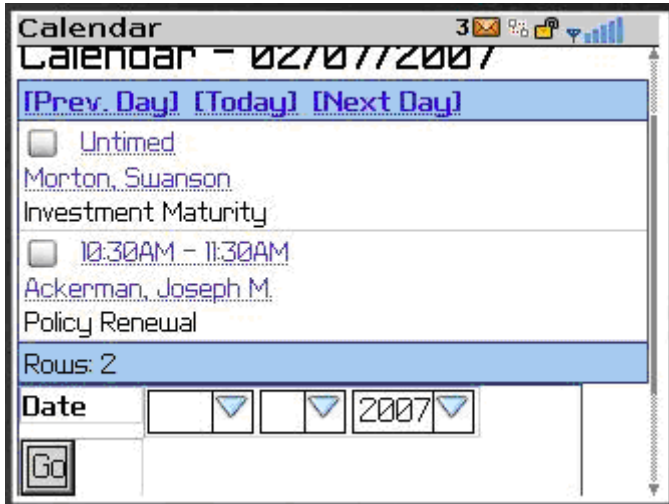
- Calendar
- Contact
- Households
- Advisors/Agencies
- Pending Cases (Optional Module)
- Leads (Optional Module)
- Opportunities (Optional Module)
- Message Center

Access to some of these record types is restricted to users with a license for the respective module. These modules are explained in detail in subsequent sections. Access the Main Menu through the Main Menu hyperlinks available in the top right and the bottom right corners of each screen.



Calendar

The Calendar displays the various activity types (e.g., appointments, calls, etc.) that are scheduled for the day.



Click the **Calendar** hyperlink in the Main menu to display the list of activities scheduled for the current date. The activities of the previous and next days can be viewed by clicking the **Prev. Day** and **Next Day** hyperlinks. The **Today** hyperlink displays the activities for the current date. Activities can be added and deleted using the Add and Delete buttons.

Activity Detail

To view activity detail information, click the **Time** hyperlink to open the Activity Detail page. For an untimed activity, click the **Untimed** hyperlink to open the Activity Detail page.

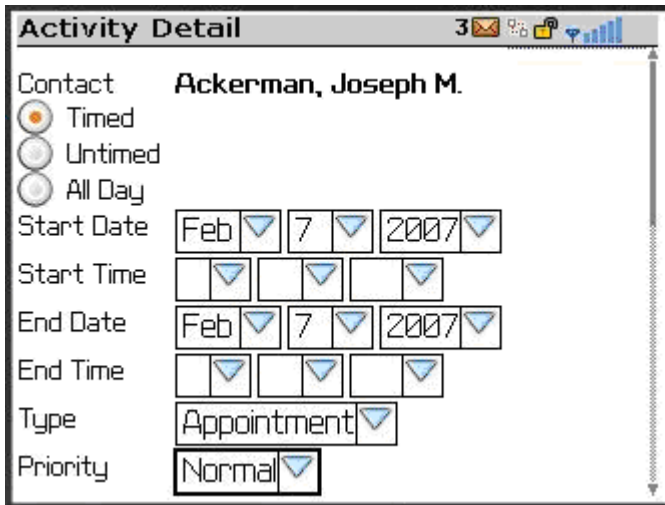


Activity Detail – Buttons

- To add additional participants, click the **Show Participant list** button.
- To delete an activity record, click the **Delete Records** button.
- To edit, click the **Switch to Edit Mode** button.
- To mark an activity done, click the **Mark Done** button. Tracked Call and Appointment activities that are marked Done will have the status of Done/Pending. For these activities, the outcome options of the Appointment/Call Outcome Wizards can be selected by logging into SmartOffice and then changing the Status from Done/Pending to **Done**.

Adding an Activity

From the Activity Summary, click the **Add** button to display the Contact Search page. Specify the search criteria for the contact and then click the **GO** button to display the Contact List. Select the appropriate contact hyperlink to display the new activity page.



The screenshot shows a mobile application interface for adding an activity. The title bar reads "Activity Detail" and includes a notification icon with the number "3" and several status icons. The form contains the following fields:

- Contact: Ackerman, Joseph M.
- Activity Type: Timed (selected), Untimed, All Day
- Start Date: Feb 7 2007
- Start Time: [empty]
- End Date: Feb 7 2007
- End Time: [empty]
- Type: Appointment
- Priority: Normal

Enter the details of the new activity such as the Type – Timed, Untimed, or All Day Event, Date, Time, Type, Priority, Show Time As, Place, Keywords, Subject, and Reason, and then click the **Save** button. Clicking the **Cancel** button will display the Contact List.

Contacts

From the Main Menu, select the **Contacts** hyperlink to display Contact Search screen. Search by Name, Employer, and/or Alphakey.

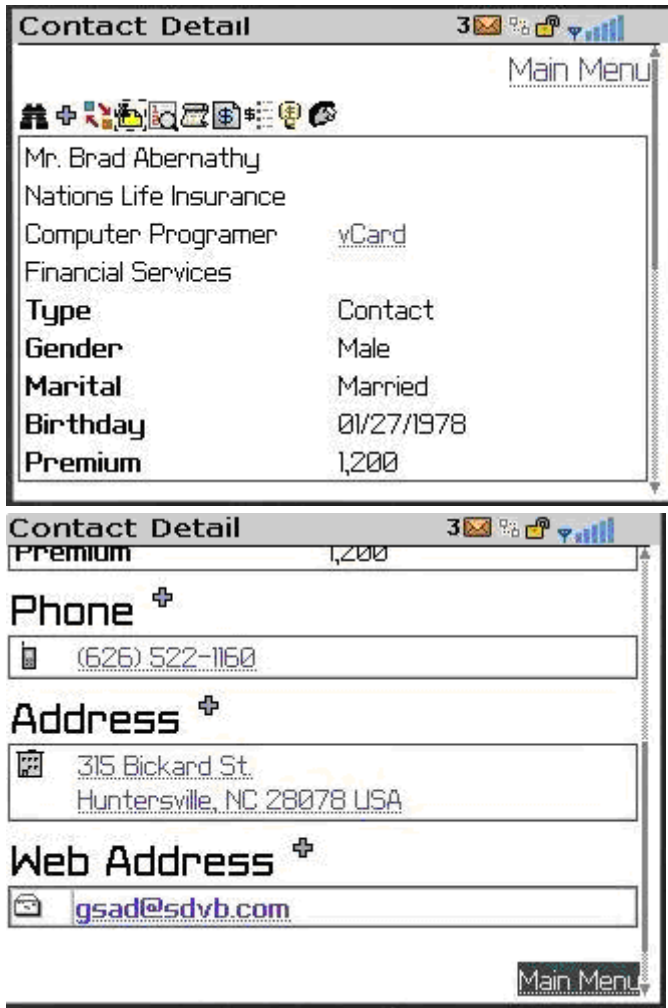


The screenshot shows a PDA screen titled "Search Contact". At the top right of the title bar is a "Main Menu" button. Below the title bar is a plus sign icon and the text "Contact Search". There are three input fields labeled "Name", "Employer", and "Alphakey". A "Go" button is located at the bottom left of the form area.

Enter the Search criteria for the contact and then click the **GO** button. The Contact Summary is displayed based upon the designated search criteria. Selecting the Contact hyperlink from the Contact List displays the Contact Detail page.

Contact Detail

The Contact Detail page displays the Contact Name, Type, Job Title, Employer, Occupation, Gender, Marital status, Birthday, Phone Number, Address, and Web Address.



vCard

The vCard hyperlink that is shown on the Contact Detail page acts as a Business card that can be used to store the personal information of the contact on the handheld device. By selecting the vCard hyperlink from the Contact Detail page, the user will be prompted to add the contact to the phone device. Accepting the prompt will enable the user to add the contact from SmartPDA to the user's handheld device. All personal information such as the Last Name, First Name, Company, Title, Mobile, E-mail, Address information, and a picture of the contact can be updated to the contact record on the handheld device.

Contact Search

Click the **Search** button on the Contact Detail page to search for contact records.

Adding a Contact Record

A new contact record can be added by selecting the **Add** button from the Contact Search or Contact Detail pages.

The following information related to the contact can be entered when adding a new contact record.

- Last Name
- Suffix
- First Name
- Middle Name
- Greeting
- Title
- Type
- Sub Type
- Job Title
- Employer
- Occupation
- Gender
- Marital
- Birthday
- Remarks

Phone Number, Address, and Web Address information can also be added using the **Add** button in the respective sections.

Modifying a Contact Record

A contact record can be modified by clicking the **Switch to Edit Mode** button. Phone Number, Address, and Web Address information can also be edited by selecting the appropriate hyperlink in the Phone, Address, and Web Address sections respectively.

Contact SmartPad

The SmartPad records of a contact can be viewed by clicking the **SmartPad** button on the Contact Detail page.

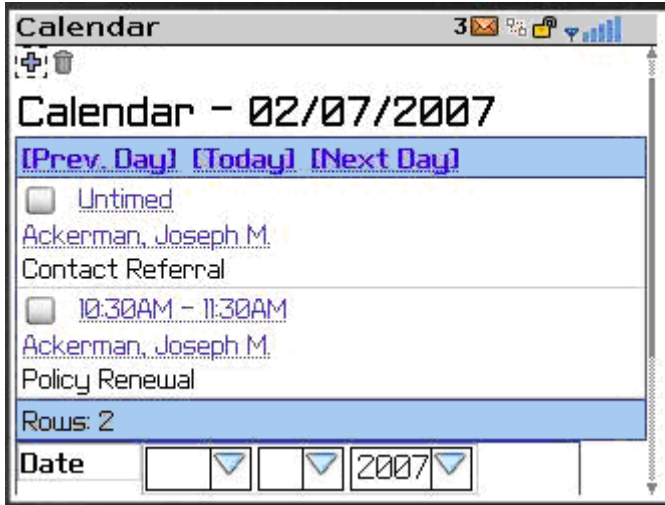


The SmartPad displays the SmartPad records for the contact record. The user can add and delete the SmartPad notes using the Add and Delete buttons. Clicking the date hyperlink of the SmartPad note will display the Detail page of the SmartPad note in editable mode. The Notes and Keywords can be modified and saved.



Activity Log of a Contact

Activities of a particular contact can be viewed by selecting the **Activity Log** button on the Contact Detail page.



Activities for the current date are displayed by default in the activity log. Display the activities of the previous and next days by clicking the **Prev. Day**, **Today**, and **Next Day** hyperlinks. Activities can be added and deleted from the activity log using the Add and Delete Record(s) buttons.

Policy Summary of a Contact

Users must have the appropriate Policy rights to access this module. The policy records linked to the particular contact can be viewed by selecting the **Policy Summary** button from the Contact Detail page. The details of the policy record(s) can be viewed by clicking the **Type** hyperlink displayed on the Individual Contact – Policy Summary.

Policy#	Product Name
P325166	Total Coverage
S823490	Preferred Life
AK20392	American Level 10
986354	American Product
<None>	American Level 10
<None>	American Level 20
<None>	American Level 10

Account Master Summary of a Contact

Users must have the appropriate Investment rights to access this module. The Account Master records of a particular contact can be viewed by selecting the **Account Master** button on the Contact Detail page. All of the account master records of the selected contact are displayed. The fields that display include the Account No., Account Name, Account Type, Qualified, How Held, Owner, Gross Value, Loan Amount, Net Value, and Account Open Date.

The screenshot shows a mobile application window titled "AcctMaster List" with a "Main Menu" button. The main heading is "Accounts - Joseph Ackerman". Below this, the following account details are listed:

Acct #	45812
Account Name	Ackerman Annuities
Account Type	Individual
Qualified	Yes
How Held	Directly Owned
Owner	Client
Gross Value	117,369.36
Loan Amount	1,379.58
Net Value	115,989.78
Acct Open Date	11/23/2000

Position Summary of a Contact

Users must have the appropriate Investment rights to access this module. The Position Summary can be viewed by selecting the **Position Summary** button from the Contact Detail page. In the Position Summary, the Holding Type, and Investment Name columns will display the details of all available Investment positions.

The screenshot shows a mobile application window titled "Position List" with a "Main Menu" button. The main heading is "Positions - Joseph Ackerman". Below this, a table displays investment positions:

Holding Type	Investment Name
Mutual Funds	Morgan Stanley U.S. Govt Sec A
Mutual Funds	American Century High Yield A
Mutual Funds	AIM Growth Fund
Mutual Funds	American Century High Yield A
Stocks	Amgen Corporation
Stocks	AT&T
Bonds	ATT 8.8 2010

The Holding Type column is a hyperlinked column that will open the position detail of a selected record.



Opportunity Summary of a Contact

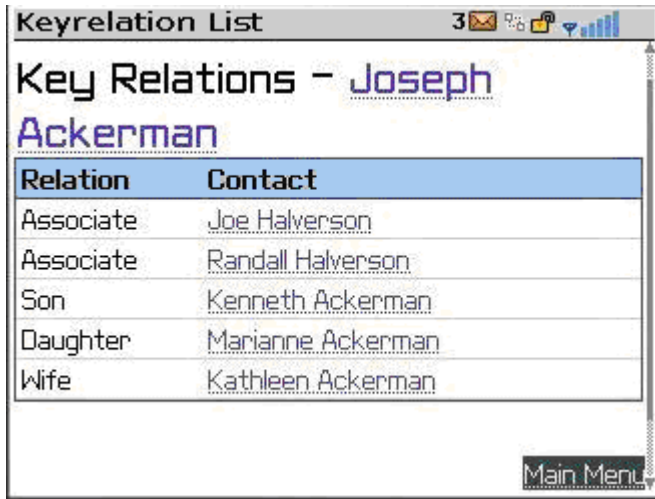
Users must have the appropriate Opportunity rights to access this module. The Opportunity Summary can be viewed by selecting the **Opportunity Summary** button on the Contact Detail page.



It displays the Opportunity Name, Campaign Name, Stage, Status, Type, Source, Owner, and Potential of the contact. The Opportunity Detail field is a hyperlinked field that will display the Opportunity Detail information.

Key Relations

The Key Relations of an individual contact record can be viewed by selecting the **Key Relations** button on the Contact Detail page.



Relation	Contact
Associate	Joe Halverson
Associate	Randall Halverson
Son	Kenneth Ackerman
Daughter	Marianne Ackerman
Wife	Kathleen Ackerman

Households

Household records can be viewed by selecting the **Households** hyperlink from the Main Menu.



Search Household

+

Household Search

Name

Go

SmartPDA

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The Household Name is the search criteria for Household records. Click the **Go** button to display the list of Household records. The Household List displays the Household Name, Household Head, and Address. The Household Name field is a hyperlinked field that will open the Household Detail page.



Household Detail

The Household Detail page displays the Household Head, Address, Income, Net Worth, Policy#, Premium, Investment Total, and the members of the Household.





Adding a new Household

A new household record can be added by clicking the **Add** button on the Household Detail page. Once the Add button is selected, it prompts to designate a Household Head.

Once a contact is selected as Household Head, the Household Detail page displays where the user can enter the Household Name, Income, Income Range, Net Worth, and Net Worth Range. Once the details are entered, click the **Save** button.

Advisors/Agencies

The Advisors/Agencies Search option is used to access all-important Advisor and Agency related information while on the go. All of the basic business related information for an advisor or agency is presented under this menu.

Advisors/Agencies Search

Select the **Advisors/Agencies Search** hyperlink from the Main Menu screen to display the Advisors/Agencies Search screen. An advisor or agency can be searched either by using the Name or through the Source in the Advisors/Agencies Search screen.



Search Agent

3 [icons]

Main Menu

Advisors/Agencies Search

Name

Source

Go

SmartPDA

Main Menu

Advisors/Agencies List

Select the **Go** button from the Advisors/Agencies Search screen to display the Advisors/Agencies List. The Advisors/Agencies List displays the summary of available Advisors and Agencies based on the search criteria entered in the previous screen.

The Advisor Name is listed along with the Phone Numbers that are marked as Preferred on the Advisors/Agencies List.



Agent List

3 [icons]

Advisors/Agencies List

Advisor	Phone
Able, Christian	(909) 875-7222#26541
Adams, Mark	(800) 335-1452#103
Alexander, Sherman	(323) 122-1151
Allred, Jenny	(323) 882-9288
American Insurance Services	(704) 987-8240
Anderson, Philip	(909) 874-7222#73
Artiss, Jill	(433) 367-3493

Advisor Detail

Select the Advisor hyperlink from the Advisors/Agencies screen to display the Advisor Detail screen. The Advisor Name, Agency Name, Type, Supervisor's Name, Region Code, and Office Code are displayed. The Pending Business section displays information such as the Pending Case Options, Pending Production, and the Last Submitted Date.

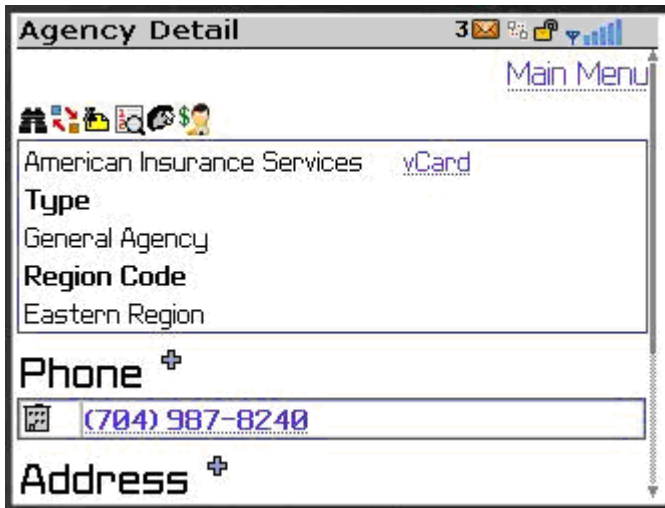


Modify an Advisor Record

Use the **Switch to Edit-mode** button to modify the Advisor Detail record. The Last Name, Suffix, First Name, Middle Name, Greeting, Title, Agency Name, Source, Marketing Manager, Region, and Office Code information can be modified. The type of Advisor record can be modified using the Type drop-down list. A small note or a remark about the Advisor record can also be entered using the Remarks field.

Agency Detail

Select the Agency Name hyperlink from the Advisors/Agencies List screen to display the Agency Detail screen. The Agency Name, Type, and Region Code are displayed.



Phone – Advisor/Agency

Add a new Phone number to the Advisor/Agency record by selecting the **Add** button in the Phone section. Selecting the phone number type indicator shown before the phone number enables the user to modify an existing phone number.

Address – Advisor/Agency

Add a new Address to the Advisor/Agency record by selecting the **Add** button in the Address section. Selecting the Address type indicator shown before the address enables the user to modify an existing address.

Modify an Agency Record

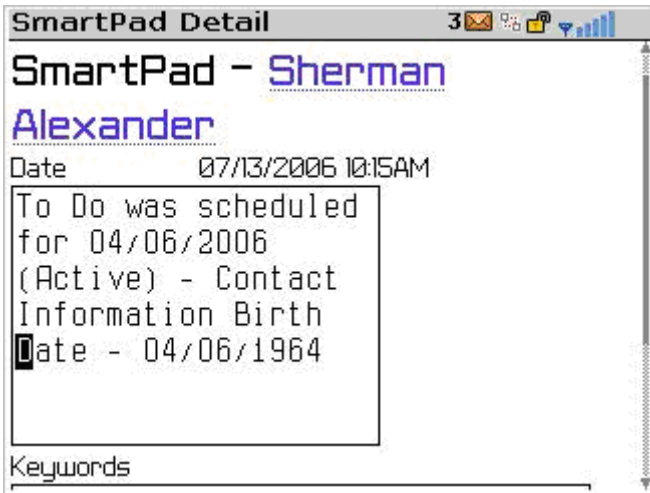
Use the **Switch to Edit-mode** button to modify the Agency Detail record. The Agency Name, Source, Marketing Manager, Region, and Office Code can be modified. To specify if the record is a manager, staff, BGA or other designation, use the Type drop-down list. A brief note or a remark about the Advisor/Agency record can also be entered using the Remarks field.

SmartPad of an Advisor/Agency

The SmartPad related records for an Advisor or an Agency can be viewed by selecting the **SmartPad** button from the Advisor/Agency Detail page.

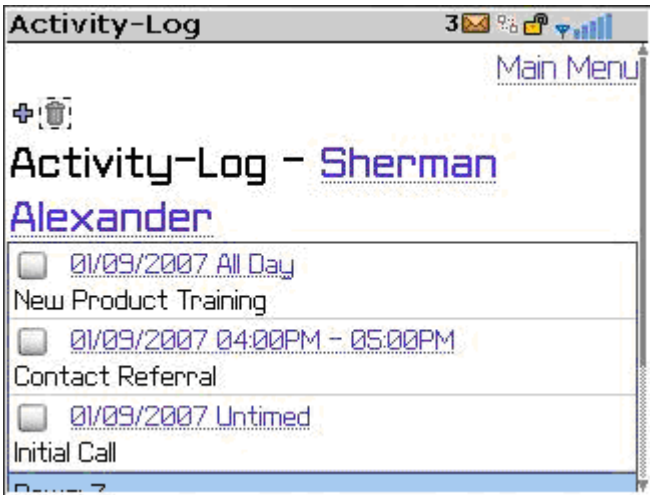


The SmartPad displays the SmartPad notes of the Advisor/Agency. Add and delete the SmartPad notes using the **Add** and **Delete** buttons. Select the date hyperlink of the SmartPad note to display the Detail page of the SmartPad note in edit mode. The Notes and Keywords can be modified and saved.



Activity Log of an Advisor/Agency

Activities of a particular Advisor or an Agency can be viewed by selecting the **Activity Log** button on the Advisor or Agency Detail page.



Activities for the current date are displayed by default in the activity log and activities of the previous and next days can be displayed by clicking the **Prev. Day**, **Today**, and **Next Day** hyperlinks. Activities can be added and deleted from the Activity Log Summary using the **Add** and **Delete Record(s)** buttons.

Key Relations

The Key Relations of an Advisor/Agency record can be viewed by selecting the **Key Relations** button on the Advisor/Agency Detail page.



The screenshot shows a mobile application interface titled "Keyrelation List". At the top right, there are icons for email (3), a lock, and signal strength. A "Main Menu" button is visible in the top right corner. The main heading is "Key Relations - Sherman Alexander". Below this is a table with two columns: "Relation" and "Contact".

Relation	Contact
Wife	Felicia Alexander
Associate	Nataniel Andrick
Associate	Sandy Appleton
Attorney	Timothy Kelley
Friend	Charles Nelson

Production Dashboard

Users must have the appropriate Production Dashboard rights to access this module. The Production Dashboard provides a snapshot view of all the necessary production details pertaining to an advisor/agency. This can be viewed by selecting the **Production Dashboard** button from the Advisor/Agency Detail screen.



The screenshot shows a mobile application interface titled "Agent List". At the top right, there are icons for email (3), a lock, and signal strength. A "Main Menu" button is visible in the top right corner. The main heading is "Advisor - Best Brokerage Agency". Below this is a list of production-related items:

- Pending
- Annuity
- Cases 0
- Production 0
- Last Submitted
- Days
- DI

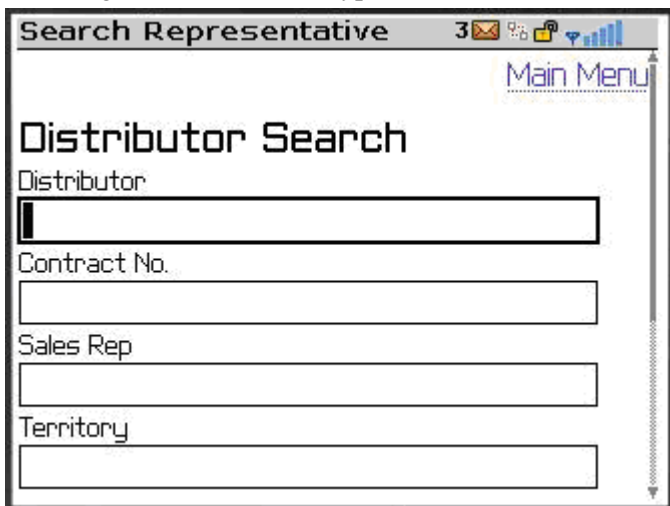
Distributors

Users must have the appropriate Wholesaler rights to access this module. When the user has the license for the Wholesaler module, the Main Menu is displayed as shown below. With the Wholesaler license, SmartPDA enables the user to view the details about the Wholesaler Distributors.



Distributor Search

Selecting the **Distributors** hyperlink from the Main Menu displays the Distributor Search page.



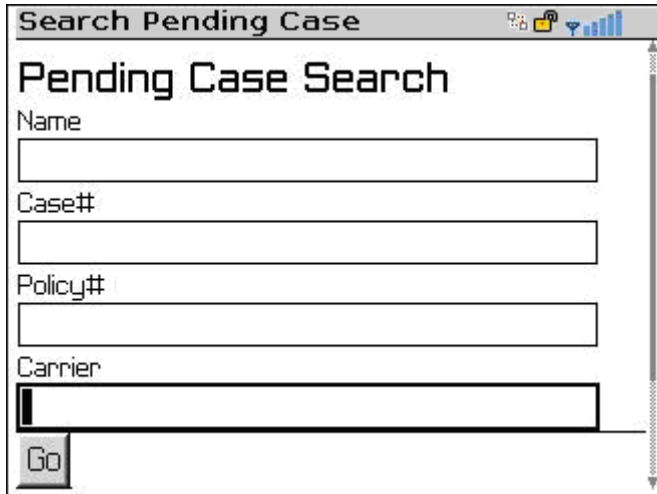
From the Distributor Search screen, use any of the following search parameters to display a particular distributor record: Distributor Name, Contract Number, Sales Rep, Territory, and Sales Channel.

Pending Cases

Users must have the appropriate Pending Case rights to access this module. Pending Cases Status in the SmartPDA provides a powerful snapshot view of the existing Pending Case records in a user's office. This gives access to all the necessary basic information related to a pending case record.

Pending Case Search

Select the **Pending Cases** option from the Main Menu to display the Pending Case Search screen. The Pending Case Search has been simplified so that the Contact's Name, Pending Case Number, Policy Number, and the Carrier Name can be used to search for a pending case record.



Search Pending Case

Pending Case Search

Name

Case#

Policy#

Carrier

Go

Pending Case List

Select the **Go** button from the Pending Case Search screen to display the Pending Case Detail information. The Pending Case List displays all of the pending case records that satisfy the search criteria entered in the previous search screen. The Contact name to which the pending case record exists is listed with the Type of the pending case record and the Product Name.



Pending Case List

Name	Type	Product Name
Mr. Frank J. Barteld	Life	American Level 20
Dr. Carolina Christiansen	Life	Economizer
Mrs. Jane Smith	Life	American Level 10
Mrs. Eileen Farmer	Life	American Level 20
Mr. Michael J. Annieta (Mike)	Life	Designer Plan Life

Pending Case Detail

Selecting the Contact Name hyperlink from the Pending Case List displays the Pending Case Detail information. The Pending Case Detail screen displays the Contact Name, Holding Type, Product Type, Policy Number, Carrier Name, Status of the Pending Case, Stage of the Pending Case, the Basic Face Value, and Annual Premium.

Click a **Main Menu** hyperlink shown in both the top right and bottom right corner of the screen to return to the Main Menu. To display the Pending Case Search screen, click the **Search** button from the Pending Case Detail screen.

Pending Case Detail

Main Menu

Pending Case Detail

Contact Frank Bartelo
Holding Type Life
Product Type Term
Policy# 40050991
Carrier ABC Life
Status Inforce
Stage Active
Basic Face 100,000
Annual Premium 75000

Leads

Users must have the appropriate Leads rights to access this module. Leads in SmartPDA provide the user with a quick view of all existing Leads available in SmartOffice.

Leads Search

Select the **Leads** option from the Main Menu to display the Leads Search screen. Enter the appropriate lead information and then click the **Go** button to display the Leads List.

Search Leads

Leads Search

Leads Name

Campaign

City

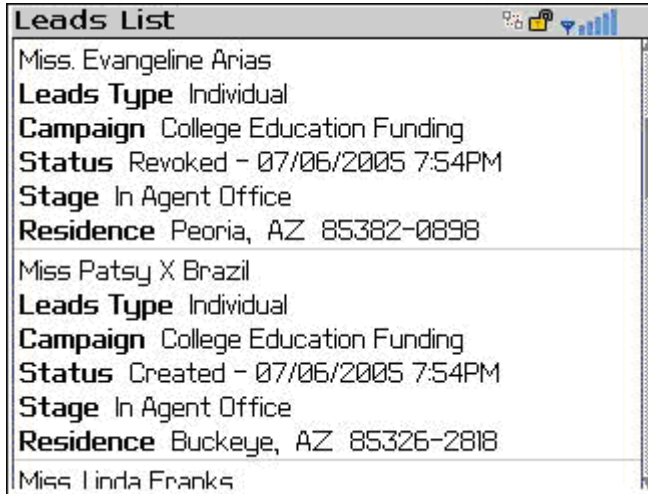
State

ZIP Code

For users with Leads Coordinator rights, the Leads list will display Unassigned leads. For users with Leads Advisor rights, the Leads list will display Unaccepted leads.

Leads List

Select the **Go** button from the Leads Search screen to display the Leads List. This lists all of the available Leads in SmartOffice. The Leads List displays the Lead Name, Leads Type, Campaign Name, Status of the Lead, Stage of the Lead, and the Residence Address.



The Main Menu hyperlinks shown in the top right and bottom right corner of the screen can be used to display the Main Menu.

Opportunities

Users must have the appropriate Opportunity rights to access this module. Opportunities in SmartPDA provide the user with a snapshot of all existing Opportunity records available in SmartOffice.

Opportunity Search

The Opportunity Search facilitates the search for a particular Opportunity record. The various search parameters that can be used to search for an opportunity record from the Opportunity Search screen include the Opportunity Name, Opportunity Type, Contact Name, Source of the Contact, Campaign Name, and Status of the Campaign.



The screenshot shows a mobile application window titled "Search Opportunity". It contains a search form with the following fields:

- Name
- Type
- Contact
- Source
- Campaign

Each field is represented by a text input box. The "Campaign" field is currently empty, while the others contain placeholder text.

Opportunity Summary

Select the **Go** button from the Opportunity Search screen to display the Opportunity Summary with the list of Opportunities available in SmartOffice. The Opportunity Summary lists the opportunity records along with information such as the Opportunity Name, Campaign Name, Stage, Status Type, Owner of the Opportunity, and Potential.

Select the Contact hyperlink from the Opportunity Summary to display the Contact Detail screen.



Opportunity Detail

Select the Opportunity Name hyperlink from the Opportunity Summary to display the Opportunity Detail screen for the selected Opportunity record. The Opportunity Detail screen in a non-editable mode enables the user to view the Opportunity Name, Current Stage of the Opportunity, Potential, Revenue, and the Estimated Close Date for the Opportunity.



The Opportunity Detail screen can be edited to update more information on the Opportunity Name, Potential Revenue, Close Probability in percentage, Estimated Close Date, and the Actual Sell Amount. Select the Contact Name hyperlink shown on the Opportunity Detail screen to display the Contact Detail screen. Selecting the **Search** button shown on the Opportunity Detail screen displays the Opportunity Search screen. Click the **Main Menu** hyperlinks shown in the top right and bottom right corner of each screen to display the Main Menu.

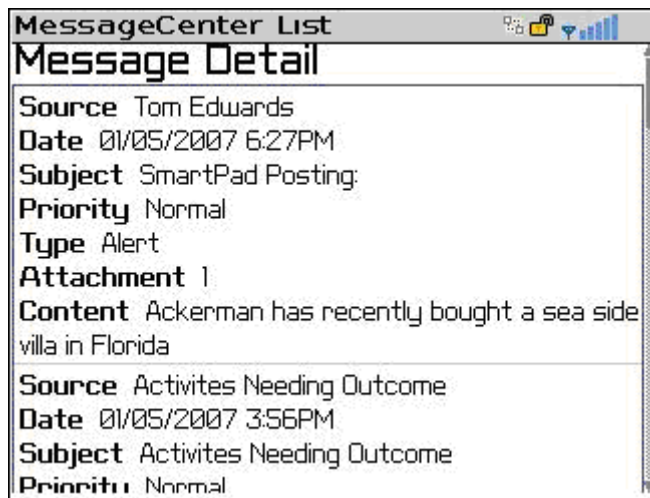
Message Center

The Message Center module in SmartPDA provides limited access to the messages that are stored in the Message Center of a user's office.

Message Detail

Select the **Message Center** hyperlink from the Main Menu to display the Message Detail screen. The Message Detail screen displays the Source information of the message, Date on which the message is posted to the message center, Subject, Priority of the message, Message Type, the Content, and any attachments related to the message.

The Main Menu hyperlinks shown in the top right and bottom right corner of each screen can be used to return to the Main Menu.



Appendix

Minimum Device Requirements for SmartPDA

- Device with Internet-browsing capability. Wireless/cellular devices such as the Treo 650 or later, BlackBerry, and Window Mobile 5 Phone edition class with at least 240 pixel horizontal resolutions (in native mode).
- QWERTY keyboard for better input capability. An ITU-T keypad is possible, but not recommended due to the difficulty involved in entering data.
- Minimum of 2.5G data throughput (e.g., GPRS, EDGE) for acceptable performance and better performance can be obtained with 3G (e.g., EV-DO, UMTS, HSDPA).
- BlackBerry model 7200 or later.