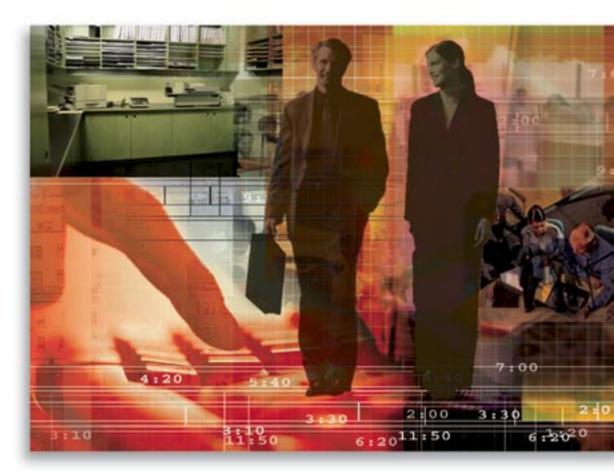
SmartView for Advisors Admin User Guide

# SmartOffice<sup>®</sup>



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# **Table of Contents**

Introduction	1
User Management and Roles	1
Setting up the SmartView for Advisors Office	2
Creating a new SmartView for Advisors User	3
Assign Existing Cases/Contacts to New SmartView for Advisors Users	5
Modify SmartView for Advisors User Roles	5
Generate a New Password for SmartView for Advisors Users	6
Delete a SmartView for Advisors User	7

## Introduction

SmartView for Advisors, an add-on module to SmartOffice, provides the ability to publish detailed policy and contact information to a secure Web page, and provide advisors and agents with all the pending case information they need – day or night, seven days a week. Using the power of the Internet and your SmartOffice solution, SmartView for Advisors can help you deliver better service to advisors, as well as free your staff from time-consuming status updates, phone calls, and activities, enabling them to focus on higher value activities. SmartView for Advisors enables the user to access the following areas:

- Contact
  - o Personal Tab
- Advisor
  - o Personal Tab
  - o Ind. Policy Tab
  - o Custom Tab
- Pending Case (PCM)
  - o Detail Tab
  - o Underwriting Tab
  - Delivery Tab
  - o Riders/Reinsurance Tab
- Policy
  - o Basic Information Tab
  - o Benefits Tab

#### **User Management and Roles**

To add, create a new password, or delete a SmartView for Advisors user, the user must have **SmartView for Advisors – Buttons** selected in the Advanced Advisor Management Features of the User Roles section. To add additional features such as Office-Level Spreadsheet Customization, Dynamic Reporting, SmartMail for Outlook, or CTM Advisor View, the user must have the Access Security Information role.

For more information on user management roles and licenses, refer to the *SmartOffice v5.1* - *SmartSecurity User Guide*.

### Setting up the SmartView for Advisors Office

To set up an office for use with SmartView for Advisors, the user must have the Policy Tracking and Pending Case & Policy Administrator licenses.

1. Select Setup from the expanded Policy /PCM Setup menu to display the Master Setup List.

Requirements
Follow-Up Requirements
Status Setup
Agency Manager Setup
PCM Workflows
Informal PCM Workflows
DataXchange Setup
NAILBA/ACORD Codes
SmartView for Advisor Privacy
PCM Status Merge Code Definition
Production Dashboard Setup - LOB Options

2. Select **SmartView for Advisor Privacy** to display the Office Setup options.

Smar	tView for Advisor Privacy
	adding an Underwriting, Delivery, or POS Requirement, select whether or not to make that requirement e to SmartView for Advisor users. Set the default for all requirements.
0 0	Visible to 'SmartView for Advisor' users Not Visible to 'SmartView for Advisor' users
0 0	PolicyNotes visible to 'SmartView for Advisor' user PolicyNotes NOT visible to 'SmartView for Advisor' user
0 0	Carrier Information visible to 'SmartView for Advisor' user Carrier Information NOT visible to 'SmartView for Advisor' user
	selected, SmartView for Advisor users can only view cases/policies on which they are listed as an Advisor Policy Advisor Summary.
	Display cases/policies based on Policy Advisor Summary

- 3. Select **Visible to 'SmartView for Advisor' users** to have all requirements that are added to a case default to being viewable to the Advisor on the case.
- 4. Select **Policy notes visible to 'SmartView for Advisor' user** to make all of the policy notes viewable to the Advisor on the case.
- 5. Select **Carrier Information visible to 'SmartView for Advisor' user** to enable the SmartView for Advisors user to view Carrier and Product Detail data.

6. By default, SmartView for Advisors users can view all cases where they are listed in the User Assignment for that client. Selecting **Display cases/policies based on Policy Advisor Summary** enables all Advisors linked to the case to view only that case and not all cases linked to the Primary Insured.

#### Creating a new SmartView for Advisors User

1. From the Advisor Summary or Personal tab, select **SmartView for Advisor User Management** from the expanded **More Features** menu to open the SmartView for Advisor User Management dialog box. Note that if doing this from the Summary, only one Advisor can be selected at a time. Make certain the preferred e-mail address is where you want the confirmation to be sent.

🎒 S m	artOffice	×
Sma	rtView for Advisor User Management	
(	Create SmartView for Advisor User	
6	Delete SmartView for Advisor User	
0	Generate Password	
	OK Cancel	
	🔮 Internet	11.

2. Select **Create SmartView for Advisor User** and then click the **OK** button to open the Create SmartView (Client) User dialog box. The system will automatically generate a modifiable User Name and Password.

🚰 SmartOffice	×
Create SmartView (Client) User	
Specify a login name for, Alexi Baronov This name needs to be unique in the office.	
User Name alexibaronov19 The system will generate your password 🔽	
OK Cancel	

By clearing the **The system will generate your password** option, a password field will display in order to specify a password for the new SmartView for Advisor user.

🚰 SmartOffice	×
Create SmartView (Client) User	
Specify a login name for, Alexi Baronov This name needs to be unique in the office.	
User Name alexibaronov19	
Password	
The system will generate your password 🔽	
OK Cancel	
🙋 Internet	_//

3. Click the **OK** button to open a Confirmation dialog box displaying the Advisors Full Name, Office Name, User Name, and Password. A confirmation e-mail will be sent to the new user when creation is complete. If no e-mail address was designated for the Advisor, document this information to provide to the new user.

SmartOffice	х
Login Name created successfully.	
Full Name : Alexi Baronov Office Name : KandaceDEV User Name : alexibaronov19 Password : F8II4G6	
An e-mail message containing the above information has been sent to you and the client.	
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- 4. Click the **OK** button. The new user will have the following roles assigned:
  - User-Level Spreadsheet Customization under the Column Layout Customization section.
  - SmartMail for Outlook under the E-mail Interface section.

#### Assign Existing Cases/Contacts to New SmartView for Advisors Users

- Select the SmartView for Advisors Buttons option on the User Setup > User Management > Users Roles/Licenses tab in the Advanced Advisor Management Features section.
- 2. From the Advisor Summary or Personal tab, select **Assign Contact to the Current Advisor** from the expanded **More Features** menu to open a Confirmation dialog box. Note that when doing this from the Summary, only one Advisor can be selected at a time.

🎒 Cor	firmation ? 🗙
0	This function will create assignments for all the contacts with the following conditions with the current advisor-user. With these assignments, all the selected contacts will become visible to the current advisor-user.
	Contact Condition: 1. All the contacts which have the current advisor as 'Primary Advisor'. 2. All policy records assigned to the current advisor. 3. All account master records assigned to the current advisor.
	Would you like to continue?
	Yes No
	🧐 Internet

3. The Confirmation dialog box lists the assignments for which all the selected contacts will become visible to the current advisor-user. Click the **Yes** button to continue. A General Information dialog box opens informing the user that the Contacts are now assigned to the current Appuser Advisor.



4. Click the **OK** button.

#### **Modify SmartView for Advisors User Roles**

Select the Access Security Information option on the User Setup > User Management > Users Roles/Licenses tab in the Administrator section.

The user can provide the SmartView for Advisors user with the following Roles:

- Office-Level Spreadsheet Customization under the Column Layout Customization section.
- User-Level Spreadsheet Customization under the Column Layout Customization section.
- SmartMail for Outlook under the E-mail Interface section.

The user can provide the SmartView for Advisors user with the following Licenses:

- 1. CTM Advisor View.
- 2. Smart Commissions Carrier Interface.

# Generate a New Password for SmartView for Advisors Users

- Select the SmartView for Advisors Buttons option on the User Setup > User Management > Users Roles/Licenses tab in the Advanced Advisor Management Features section.
- 2. From the Advisor Summary or Personal tab, select **SmartView for Advisor User Management** from the expanded **More Features** menu to open the SmartView for Advisor User Management dialog box. Note that if doing this from the Summary, only one Advisor can be selected at a time. Make sure the preferred e-mail address is where you want the confirmation to be sent.

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SmartVi	ew for Advisor User Management	
0	Create SmartView for Advisor User	
0	Delete SmartView for Advisor User	
ē	Generate Password	
	OK Cancel	

3. Select **Generate Password** and then click the **OK** button to open the Confirmation dialog box.

🖉 SmartOffice 🛛 🔀
Password generated successfully.
Full Name : Alexi Baronov Office Name : KandaceDEV User Name : alexibaronov19 Password : Q8L8H3
An e-mail message containing the above information has been sent to you. Forward the message to %1
internet

- 4. The Advisor's Full Name, Office Name, User Name, and Password is displayed. A confirmation e-mail will be sent to the new user when creation is complete. If no e-mail address was designated for the Advisor, document this information to provide to the new user.
- 5. Click the **Close** button.

#### Delete a SmartView for Advisors User

- Select the SmartView for Advisors Buttons option on the User Setup > User Management > Users Roles/Licenses tab in the Advanced Advisor Management Features section.
- 2. From the Advisor Summary or Personal tab, select SmartView for Advisor User Management from the expanded More Features menu to open the SmartView for Advisor User Management dialog box. Note that if doing this from the Summary, only one Advisor can be selected at a time. Make sure the preferred e-mail address is where you want the confirmation to be sent.

¢	SmartOffice	×
I	SmartView for Advisor User Management	
	C Create SmartView for Advisor User	
	<ul> <li>Delete SmartView for Advisor User</li> </ul>	
	C Generate Password	
	OK Cancel	
🔮 Internet		

- 3. Select the **Delete SmartView for Advisor User** option and then click the **OK** button to display a Confirmation dialog box informing the user that the "SmartView for Advisor User for Advisor Name" was deleted successfully.
- 4. Click the **Close** button.