SmartView for Advisors
**Admin User Guide**

# SmartOffice®

Proven in Practice™

918 E. Green Street

Pasadena, CA 91106

Web: http://www.ezdata.com

Telephone: (626) 585-3505

Fax: (626) 440-9097

U.S. toll-free fax: (800) 779-3123

# Table of Contents

# 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
  - o 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.

   **SmartView for Advisor Privacy**

   *When adding an Underwriting, Delivery, or POS Requirement, select whether or not to make that requirement visible to SmartView for Advisor users. Set the default for all requirements.*

   - ⦿ Visible to 'SmartView for Advisor' users
   - ○ Not Visible to 'SmartView for Advisor' users

   - ⦿ PolicyNotes visible to 'SmartView for Advisor' user
   - ○ PolicyNotes NOT visible to 'SmartView for Advisor' user

   - ⦿ Carrier Information visible to 'SmartView for Advisor' user
   - ○ Carrier Information NOT visible to 'SmartView for Advisor' user

   *When selected, SmartView for Advisor users can only view cases/policies on which they are listed as an Advisor in the 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.



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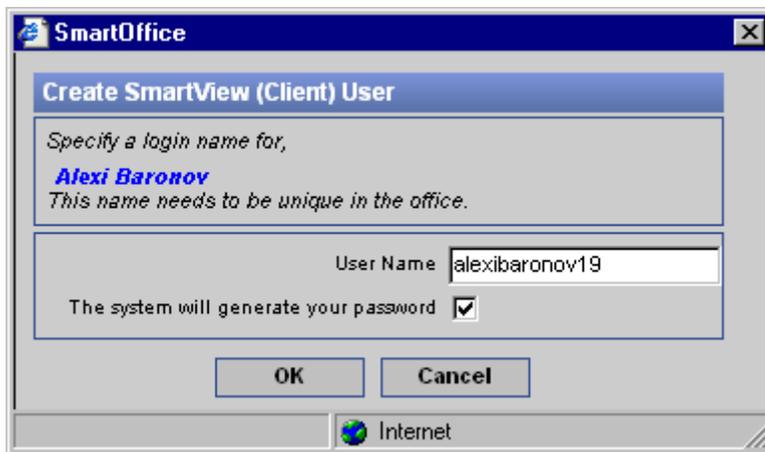
By clearing the **The system will generate your password** option, a password field will display in order to specify a password for the new SmartView for Advisor user.
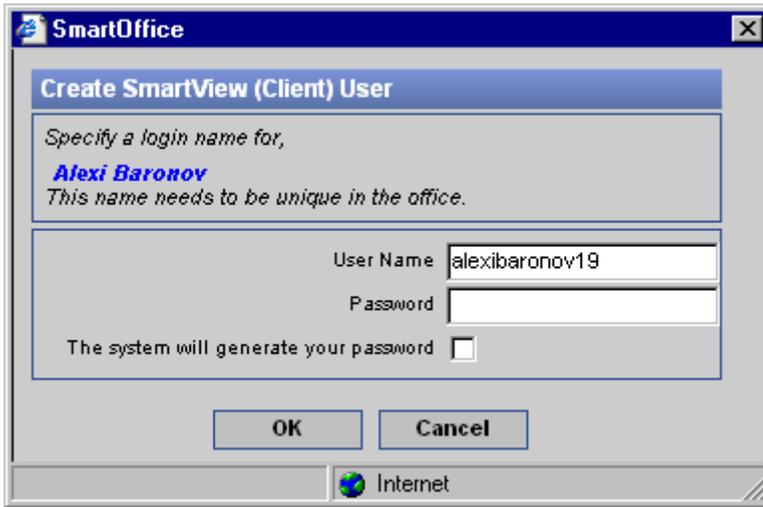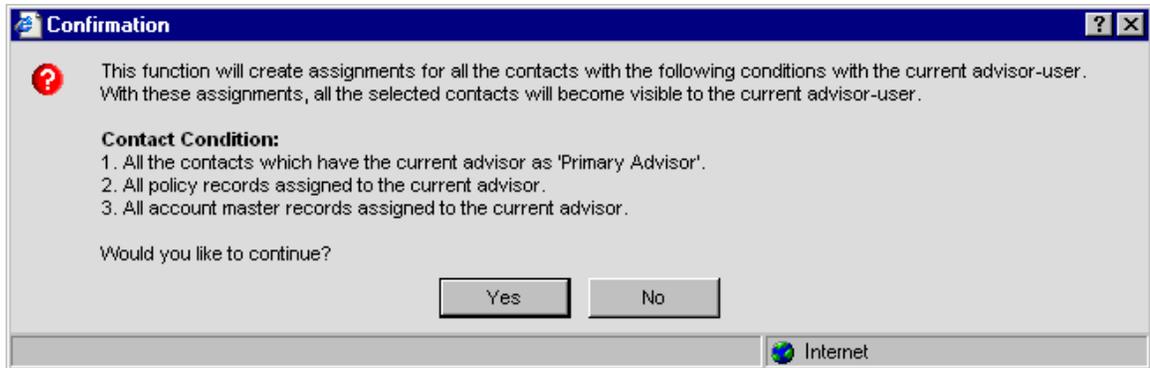


3. Click the **OK** button to open a Confirmation dialog box displaying the Advisors Full Name, Office Name, User Name, and Password. A confirmation e-mail will be sent to the new user when creation is complete. If no e-mail address was designated for the Advisor, document this information to provide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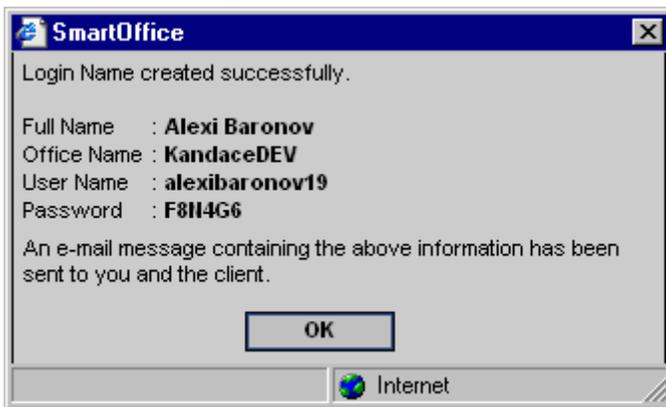


4. Click the **OK** button. The new user will have the following roles assigned:
   - User-Level Spreadsheet Customization under the Column Layout Customization section.
   - SmartMail for Outlook under the E-mail Interface section.

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

1. 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.



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

1. 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.

3. Select **Generate Password** and then click the **OK** button to open the Confirmation dialog box.
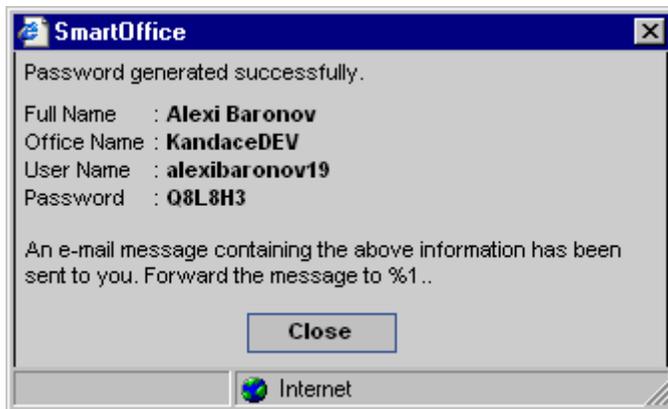
4. The Advisor's Full Name, Office Name, User Name, and Password is displayed. A confirmation e-mail will be sent to the new user when creation is complete. If no e-mail address was designated for the Advisor, document this information to provide to the new user.

5. Click the **Close** button.

# Delete a SmartView for Advisors User

1. 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.



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.