SmartLink for Windows Explorer
User Guide

SmartOffice®

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Objective

The main objective of SmartLink for Windows Explorer is to facilitate the posting of files from Windows Explorer to various areas of the SmartOffice system. While files can be posted from the Letters/Documents tab throughout the system, this is often a multi-step procedure that requires the user to physically have the record open at the time of posting.

The SmartLink for Windows Explorer interface enables the user to be anywhere in the SmartOffice system and post to almost anywhere else in the system. The interface for this function is consistent with the way users are accustomed to using other Windows Explorer plug-ins. Furthermore, by utilizing the concept of active/expanding Context Menus, SmartOffice users will feel more comfortable and confident regarding the ability to achieve results while posting files.

If a user is logged into SmartOffice and has the contact record selected, this new posting feature will provide the ability to be virtually two clicks and a description entry away from posting a file. If the user has not pre-selected the contact record, they must first find the contact and then complete the posting.

Functionality

Using the new SOActiveX component as a point of integration, SmartLink for Windows Explorer is an external component of SmartOffice. The end user interface has the following capabilities regarding the posting of files to the Letters/Documents tab, located in various areas of the system.

Posting

- Identify and post file(s) to the Active Contact. The term Active Contact refers to the Individual, Business, or Advisor record that is currently selected by the user in the current SmartOffice session.
- The ability to find any Individual, Business, or Advisor record. The ability to locate contacts that are not necessarily the Active Contact.
- The ability to locate other contacts through the Found or Current contact's Key Relations.
- The ability to post a file to a contact specific Pending Case, Policy, Account Master, Investment Position or Opportunity record. Basically, anywhere there is a Letters/Documents tab in the SmartOffice system.
- The ability to zip together and post multiple files, as one entry, to any of the areas noted above.

Navigation

From Windows Explorer there will be a SmartLink Posting menu option. When this Context Menu is selected for a file, the following workflow will occur:

- SmartLink Posting is selected and the SmartLink for Windows Explorer dialog box opens to a spreadsheet layout.
  - The Active Contact is displayed and the following toolbar buttons are available:
    - Contact Search
    - Tag All
    - Key Relations

    Module specific buttons:
    - Pending Case
    - Policy
    - Account Master
    - Investment Position
    - Opportunity
- If there currently is no Active Contact selected in SmartOffice, then the SmartLink for Windows Explorer spreadsheet will be blank when it is first opened.
- If there is more than one contact record tagged and the user selects the **Key Relations** button, the Key Relations that will be retrieved will be those for the highlighted record only. This is the same functionality that exists in the Outlook plug-in. When one or more Key Relations are selected, these will be added to the list of contacts in the SmartLink for Windows Explorer and will be automatically tagged.
- Only one contact record can be tagged if the user wants to post the file(s) to a module specific Letters/Documents tab.
  - If more than one contact is selected, the user will receive a warning message when attempting to select one of the module specific buttons.

  - When the file is posted to the Documents section of the Letters/Documents tab, it will also automatically post to the related SmartPad.
  - After the process of posting is completed, all SmartLink for Windows Explorer dialog boxes will close.

Unsupported Functionality

- The user cannot be at the Pending Case, Policy, Account Master or Investment Position summary screens, tag a record, and then open SmartLink for Windows Explorer expecting that the current record will be the default record for posting. The main record (relationship) will always be with contact records.
- The user cannot find a holding directly by using an account number or policy number.

Designs and Workflow

Installation Options

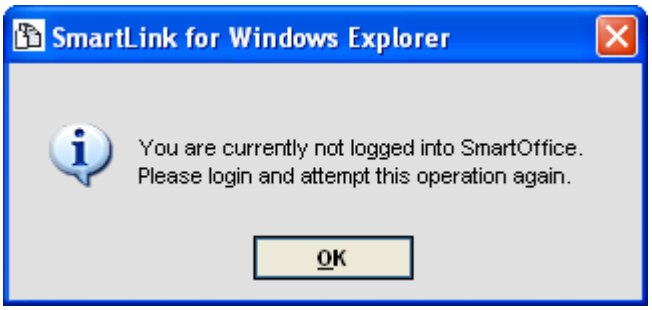
As with all other installations and plug-ins that work in conjunction with SmartOffice, the installation program for SmartLink for Windows Explorer is available from the Installations spreadsheet. This is accessed by selecting **Installations** from the **User Setup** menu. If the user does not already have the SOActiveX component installed, it will be installed when the user first installs SmartLink for Windows Explorer.

If there is a newer version of either the SOActiveX component or SmartLink for Windows Explorer, these items will automatically be updated when SmartLink for Windows Explorer is accessed by the user.

SmartLink for Windows Explorer Workflow

User not Logged into SmartOffice

The user should first be logged into the SmartOffice system to use the SmartLink for Windows Explorer plug-in. If the user is not currently logged into SmartOffice, they will receive the following message. Once the user has logged into the system, they can right-click on the appropriate file(s) and open the workflow for SmartLink for Windows Explorer.

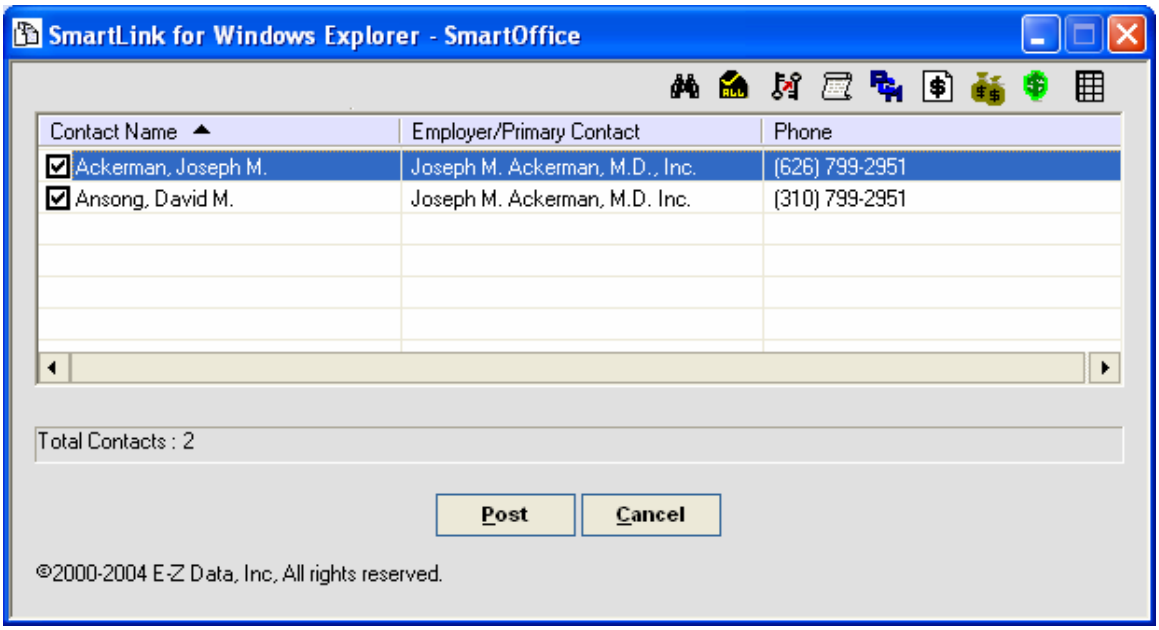


User Logged into SmartOffice

When a user right-clicks on a file or files, after having first installed the SmartLink for Windows Explorer plug-in, there will be an option on the Context Menu labeled SmartLink Posting. When the user selects this option, then the SmartLink for Windows Explorer dialog box will open.

SmartLink for Windows Explorer Program

The SmartLink for Windows Explorer dialog box is the control center for this plug-in. From here, the user can decide to search for a different contact or contacts for posting, Key Relations for one specific contact, or instead post the selected file(s) to one of five key areas of the system for one specific contact. The example depicts the SmartLink for Windows Explorer program with module buttons. This same spreadsheet view is used for both individual and business contact records. The columns listed are Contact Name, Phone and Employer/Primary Contact. The information for the Phone column will be generated from the Preferred Phone number field. Individual Contact records will have an Employer and the Primary Contact will be populated for Business Contact records.



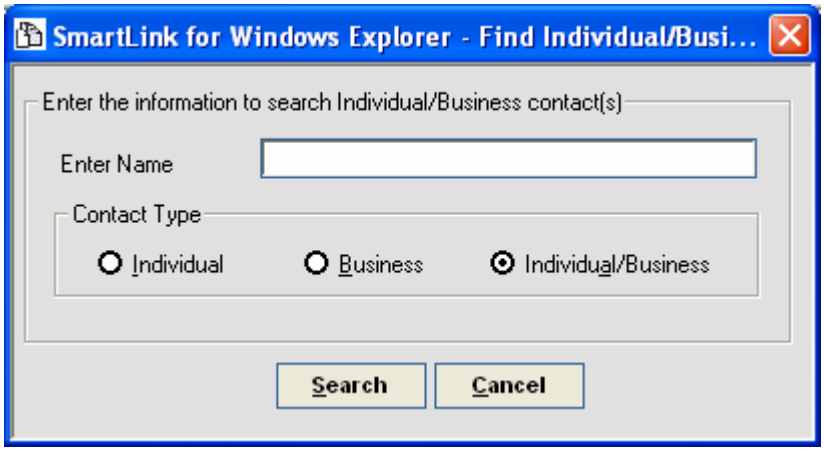
If there is currently no Active Contact selected in SmartOffice, then the SmartLink for Windows Explorer spreadsheet will be blank when it is first opened. The user will need to perform a Contact Search prior to attempting to either post the file(s) to a contact or one of the module related areas for a contact. The example below depicts the warning message received when the user selects the **Post** button and the spreadsheet is blank.

When the user selects one or more contacts and then clicks the **Post** button, the workflow outline in the Posting Options section of this document will be enforced. If the user clicks the **Cancel** button, then their focus will be returned to Windows Explorer.

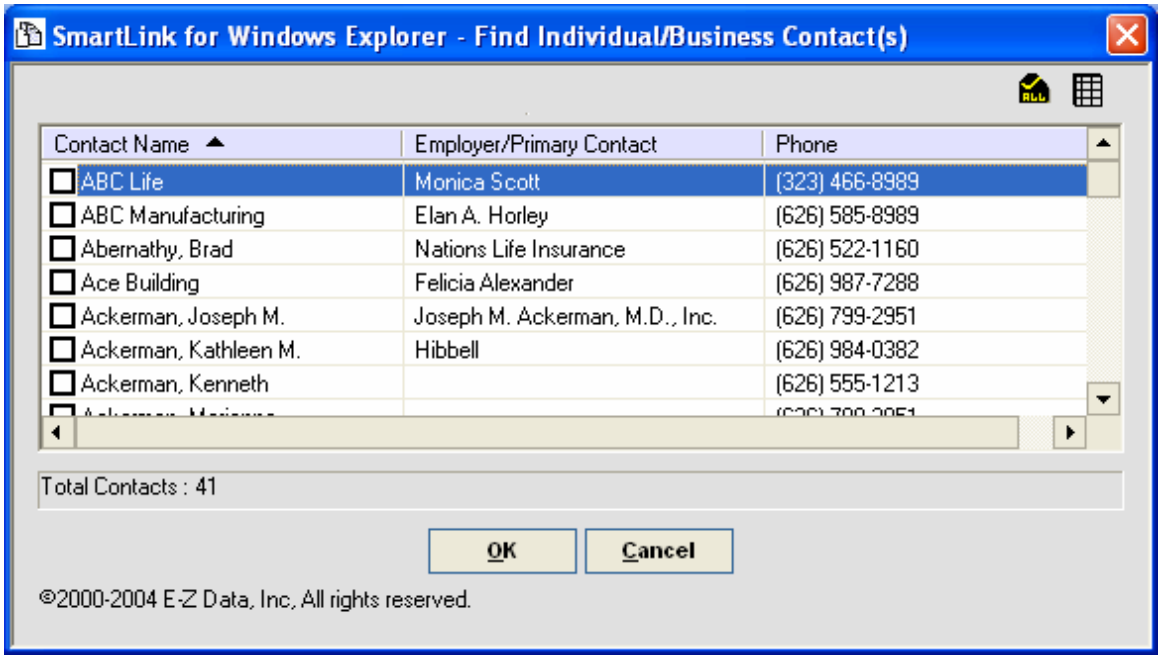
Contact Search Functionality

The following functionality and workflow exists for the SmartLink for Windows Explorer program when the Contact Search button is selected:

- **Contact Search**
  - When this button is selected, a contact search dialog box is displayed with the option to search Individual Contacts, Business Contacts, or both Individual/Business Contacts. The default when this box opens is to search both Individual and Business Contacts just as in the Outlook plug-in.

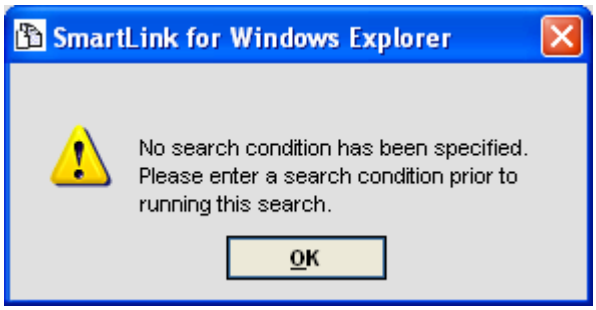


  - When the Contact Search results are returned, they are displayed in a Select Contact(s) dialog box. The SmartLink for Windows Explorer and Outlook plug-ins share the same look and feel in their Select Contact(s) dialog boxes.



  - When the user selects one or more contacts from any Select Contact(s) dialog box, they will be displayed in the SmartLink for Windows Explorer dialog box both automatically tagged and in alphabetical order.

- If the user searches more than one time, then the results of each new search will be added to the existing list of contacts and displayed on the spreadsheet in the SmartLink for Windows Explorer dialog box. These additional records will be alphabetized and tagged as well.
- The user must input some information to perform a search. Blank searches are not allowed. If the user attempts a blank search, then they will receive a warning message and the OK button will return them to the Contact Search Options dialog box.



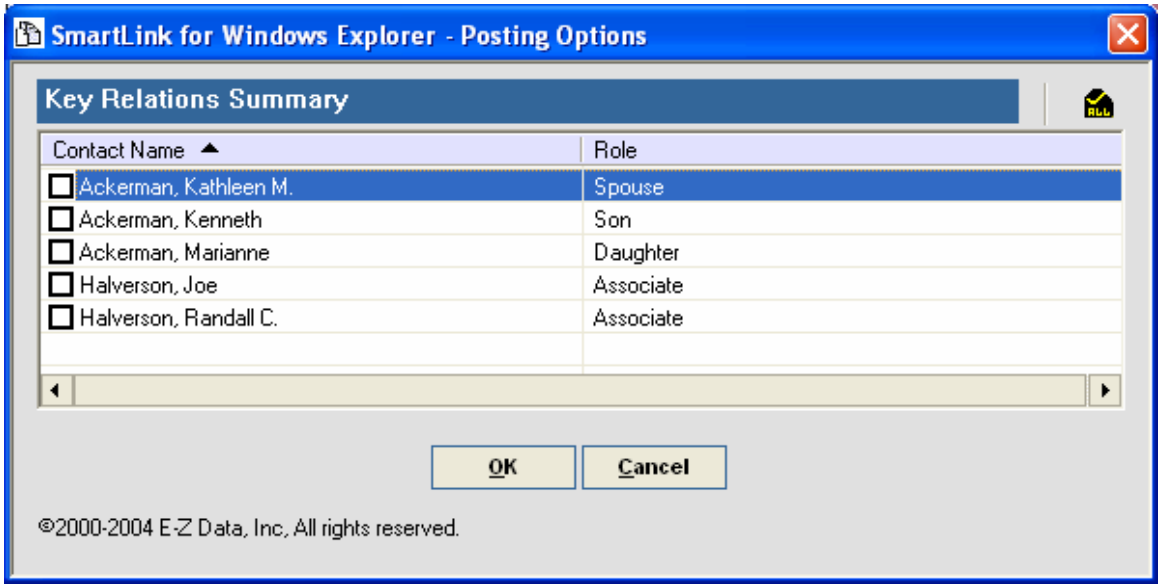
- **Contact(s) Displayed and Post Button Selected**
  - When the user selects a contact record and then selects the **Post** button, the file(s) will post to the Letters/Documents tab of the selected contact(s).

Key Relations Button Functionality

The Key Relations button functions in the same manner as it does in the Outlook plug-in. This dialog box has at least two columns for identification purposes:

- **Key Relations** – Contact Name, Role
  - Only Individual Key Relations are retrieved and displayed. Business Key Relations are not retrieved as part of this search.
  - The Key Relations button functions as it does in the Outlook plug-in. If the user has multiple tagged contacts, only the Key Relations for the highlighted line will be returned in a dialog box when the Key Relations button is selected.
  - This is the only module Select dialog box that contains a multi-select spreadsheet.
  - When the user selects one or more Key Relations and then clicks the **OK** button, these records display on the SmartLink for Windows Explorer spreadsheet in alphabetical order and will automatically be tagged.

- This dialog box is the only dialog box to have OK and Cancel buttons.
- The Cancel button will return the user to the SmartLink for Windows Explorer dialog box.



Module Button Functionality

When the user attempts to select one of the Module buttons, only one contact record may be selected; otherwise, they will receive a warning message. The following functionality and workflow exists for the SmartLink for Windows Explorer program when one of the Module buttons is selected:

- **Module Posting Options**
  - When the user selects a module button, an area specific spreadsheet will open so the user can select the appropriate record for the data type. No customization of these screens is allowed. The available columns for each data type are detailed. All the module specific spreadsheets have Post and Cancel buttons for immediate posting:
    - **Pending Case:** Plan Name, Commissionable Annualized Premium (Comm Annlzd),Case #, Status (Figure 1)
      - The only Pending Cases that are retrieved are those that normally would be displayed by the stage Underwriting_All on the global Pending Case Summary spreadsheet.
    - **Policy:** Policy #, Plan Name, Annual Premium, Policy Status, Carrier Name (Figure 2)
      - Only Active status Policies will be retrieved.
    - **Account Master:** Account Name, Account #, Open Date, Total Value (Figure 3)
      - Only Active status Accounts will be retrieved.
    - **Investment Position:** Account #, Investment Name, Symbol/CUSIP, Shares, (Current) Value (Figure 4)
      - Only Active status Positions will be retrieved.
    - **Opportunity:** Opportunity Name, Status, Campaign Name (Figure 5)
      - Only Active status Opportunities will be retrieved.

Module Posting Options Figures

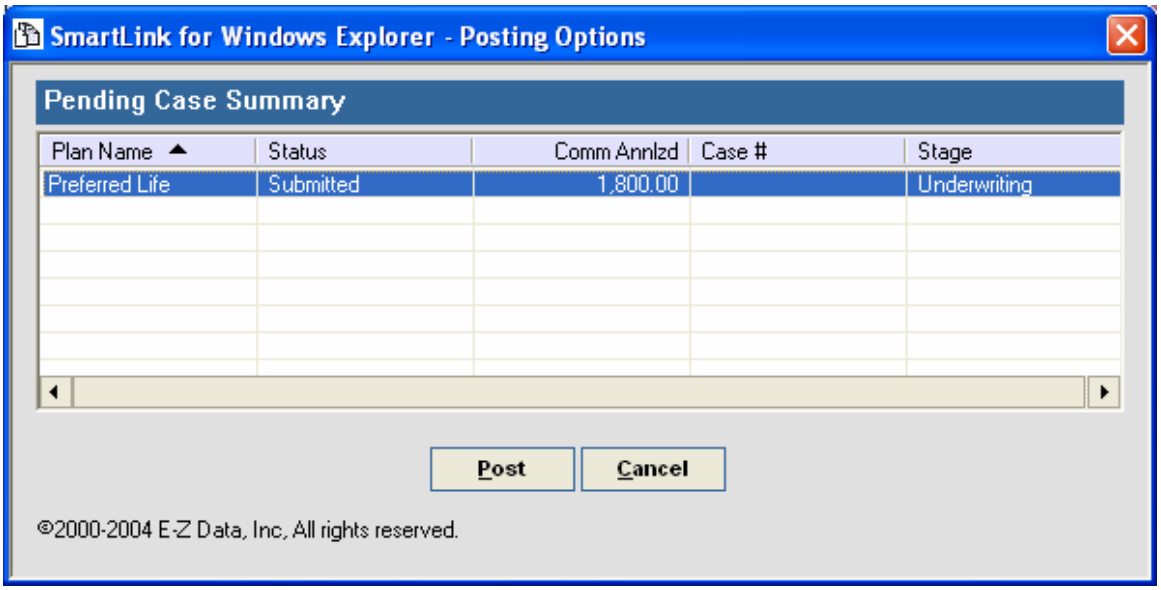


Figure 1

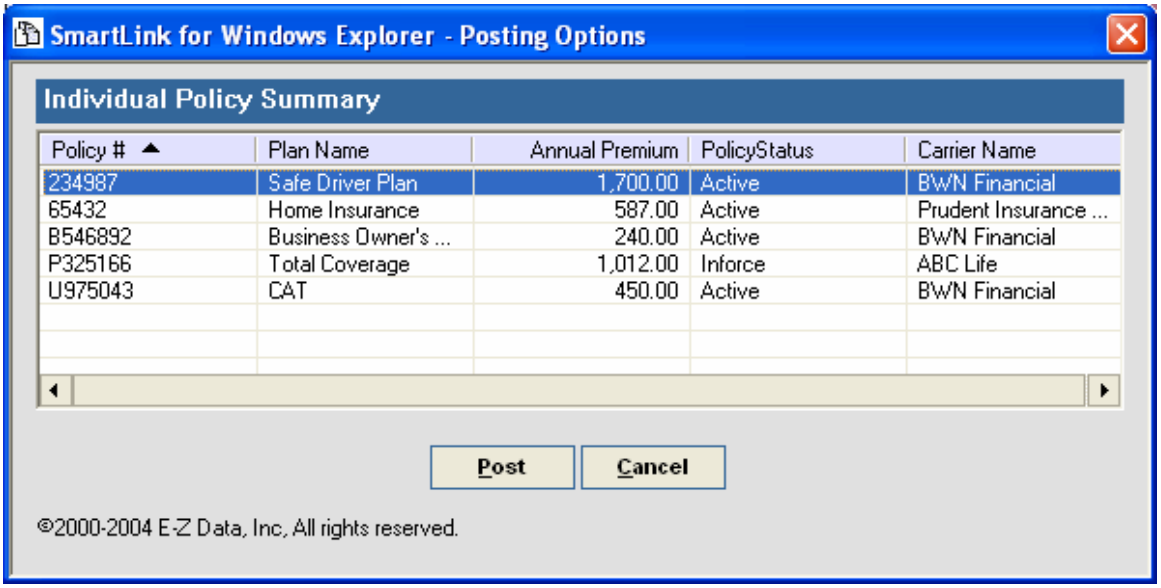


Figure 2

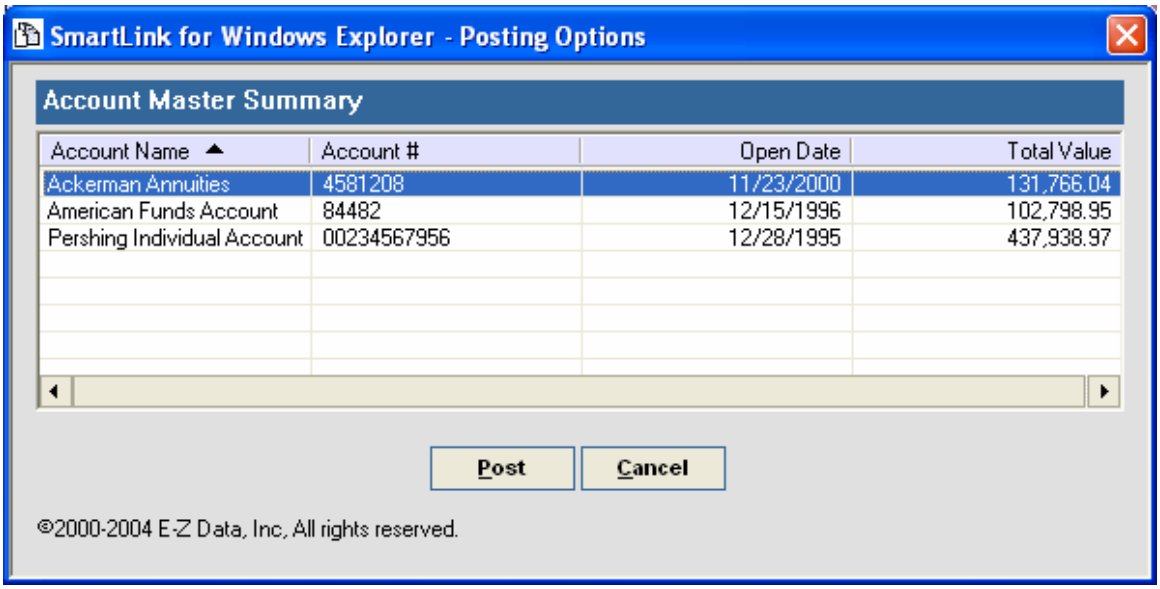


Figure 3

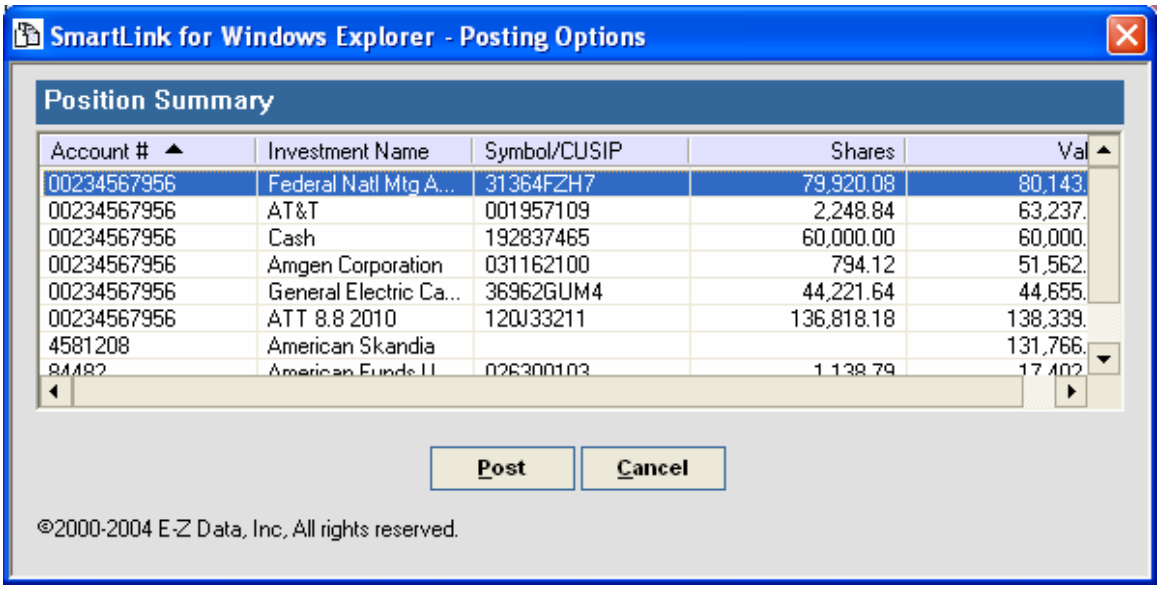


Figure 4

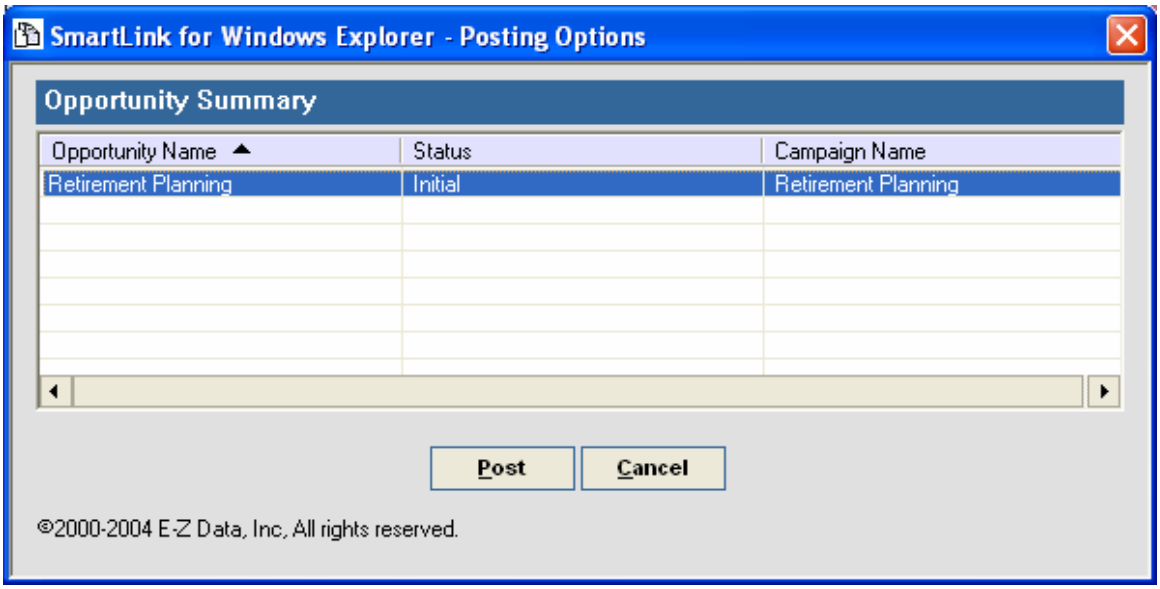


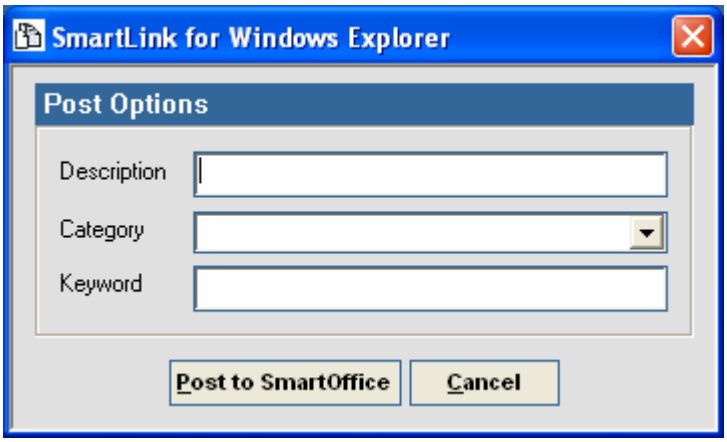
Figure 5

- Other than as noted for Key Relations, these module specific dialog boxes have single select spreadsheets and Post and Cancel buttons.
- The user will highlight the appropriate record and then select the **Post** button to immediately post the file(s) to the appropriate Letters/Documents tab.
- If the **Cancel** button is selected, then the workflow will return the user to the SmartLink for Windows Explorer dialog box.

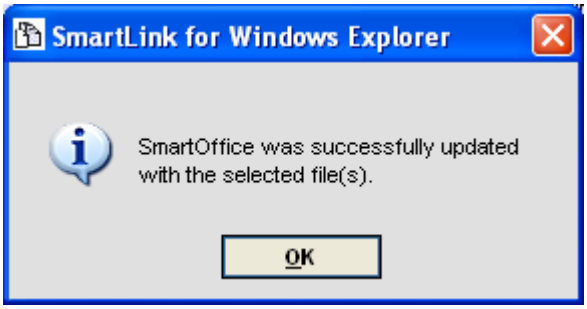
Posting Options and Error Handling

Posting Options

When the user selects the **Post** button from any of the SmartLink for Windows Explorer dialog boxes, it is expected that the selected file(s) will post to the Letters/Documents tab of the appropriate data area. After selecting the Post button, the Posting Options dialog box will open enabling the user to provide pertinent information regarding the file(s). The user can input a Description, Category, and Keyword(s) that will provide assistance in identifying the file(s) in the future. The Description field is a mandatory field for this dialog box.



Whenever the user clicks on the **Post to SmartOffice** button, then any other open SmartLink for Windows Explorer dialog boxes close. The user will receive positive notification regarding the success of the file(s) posting.



Error Reporting

If there is an error while attempting to post the selected file(s) to the appropriate Letters/Documents tab, the user will receive an error dialog box. When the posting fails, the focus will return the user to Windows Explorer.

There is also dynamic checking of certain types of restricted files that cannot be uploaded to the SmartOffice system. If the user right-clicks on one of these restricted file types and attempts to select **Post to SmartOffice** they will receive an error message dialog box prior to processing the workflow. If a restricted file is to be included as part of a group of files and is Zipped, this is permitted. The following example depicts the error dialog box that displays when only one file is selected and it is of a type that is specifically restricted by SmartOffice for posting.