SmartMail for Lotus Notes User Guide

Smart Office



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Introduction

SmartMail for Lotus Notes is an add-on feature of SmartOffice® that integrates SmartOffice with Lotus Notes and creates a seamless interface between the two, enabling users to continue using Lotus Notes as their e-mail client. Users can compose Lotus Notes e-mail messages directly from SmartOffice and post messages to the SmartPadTM. SmartMail for Lotus Notes requires either Lotus Notes version 6.x or higher. This document provides step-by-step instructions for the installation and use of SmartMail for Lotus Notes.

User Roles and Licenses

- 1. Log into SmartOffice as a System Admin user. The System Admin user can set up access rights for other offices, including SmartMail for Lotus Notes.
- 2. Select Office Settings from the expanded Office Setup menu to open a list of available offices.
- 3. Select the appropriate office and then click the Licenses tab.
- 4. Select the **Lotus Notes Integration Module** option and then click the **Save** button to record the change.
- 5. Select an appropriate user on the Users List Summary and then click the User Roles/Licenses tab.
- 6. Select the **SmartMail for Lotus Notes** option in the E-mail Interface section and then click the **Save** button. The selected user now has the SmartMail for Lotus Notes role.



Installing SmartMail for Lotus Notes

- 1. Make certain that Lotus Notes is not running prior to the installation of SmartMail.
- 2. From the side menu, click **User Setup** and then select **Installations** to open a list of additional components that can be installed from SmartOffice.



- Click SmartMail for Lotus Notes to begin installation.
 Note: If a warning displays that asks for permission to download an application from E-Z Data, Inc., click the Yes button to enable the download to occur.
- After the installation is complete, Lotus Notes will open automatically. Note: The Lotus Notes Mail template must be customized in order to work with SmartMail for Lotus Notes. This should be performed by the Lotus Notes Administrator prior to performing this installation.

SmartPad Posting Options in Lotus Notes

From the Actions menu click SmartPad Posting Options to open the SmartPad Posting Options dialog box.

s	imartMail for Lotus Notes - SmartOffice SmartPad Posting Options 🛛 🔀						
	Select SmartOffice SmartPad Posting Options						
	When the SmartMail button is selected or a message is sent from Lotus Notes:						
	Manually post message to SmartOffice contact record.						
	Prompt to post message to SmartPad when sending from Lotus Notes with a valid SmartOffice Session.						
	Automatically post message to SmartOffice contact records following confirmation.						
	C Automatically post message to SmartOffice contact records without confirmation.						
	Match SmartOffice contact records with Lotus Notes e-mail address in the following fields:						
	To 🔽 From						
	Cancel						

The SmartOffice SmartPad Posting Options dialog box provides the user with certain options to customize posting. The following options enable the user to post a composed message to SmartOffice either manually or automatically:

- Manually Post message to SmartOffice contact record. Selecting this option enables the user to post a message manually to the SmartPad of the appropriate contact(s) selected in the SmartMail for Lotus Notes dialog box in SmartOffice.
- Prompt to post message to SmartPad when sending from Lotus Notes with a valid SmartOffice Session.

Selecting this option will prompt a message to the user whether the mail is to be posted to SmartOffice or not when the **Send** button is clicked.

SmartMail for Lotus Notes						
Would you like to post this message to Contact(s) in SmartOffice?						
	Yes No					

- Automatically post message to SmartOffice contact records following confirmation. Selecting this option enables the user to post an e-mail automatically to the SmartPad of the SmartOffice contact(s) following the confirmation message box. The posting dialog box will not display in this case.
- Automatically post message to SmartOffice contact records without confirmation. Selecting this option enables the user to post an e-mail automatically to the SmartPad of the SmartOffice contact(s) without the confirmation message box. The posting dialog box will not display in this case.
- The Match the SmartOffice contact records with the Lotus notes e-mail address in the To, Cc, Bcc, From fields option enables the user to choose the e-mail address from the selected fields that need to be matched to the SmartOffice contact records.

Posting Messages to the SmartPad from Lotus Notes

In Lotus Notes, either e-mail messages from the Inbox or Sent folders can be posted to SmartOffice, or e-mail messages can be posted when the Sent button is clicked.

- 1. Open the Inbox/Sent folder.
- 2. Select an existing e-mail to be posted to the SmartPad and then click the SmartMail button.
- 3. The Request Mail dialog box displays with the list of e-mail addresses of the recipients matching the SmartOffice contacts.

SmartMail for Lotu	s Notes - SmartOffic	e	×
Request Mail			M 🏫 🕅 🗞
Source	Contact	E-Mail Address	Туре
To	Ace Building	test@ez-data.com	Business
Bcc From	No contact found. John Ackley	<u>user@test-yahoo.com</u> maria@premiertedomain.com	Individual
Total Contact(s): 3	ate in SmartPad		
	<u> </u>	<u>C</u> ancel	

4. To post the selected e-mail to additional contacts, click the **Find Contact**(s) button.

SmartMail for Lotus Notes - SmartOffice						
Request Mail			🏘 😭 🕅 🖏			
Source	Contact	E-Mail Address	Find Contact(s)	(Alt+F)		
To Bcc	Ace Building No contact found.	test@ez-data.com <u>user@test-yahoo.com</u>	Business			
From	John Ackley	maria@premiertedomain.com	Individual			
•						
Mark E-Mail Pri <u>v</u> ate in SmartPad						
Total Contact(s): 3						
	Ē	Post <u>C</u> ancel				

5. Enter the appropriate search criteria to locate a contact or business record for posting and then click the **Search** button.

SmartMail for Lotus Notes - Find Individual/Business Contact(s) 💦 🔀							
Enter the information to search Individual/Business Contact(s)							
Enter Name							
Contact Type							
O Individual O Business O Individual/Business							
<u>S</u> earch <u>C</u> ancel							
	Enter the information to search Individual/Business Contact(s) Enter Name Contact Type Individual Individual Search Cancel						

6. Select any additional contact(s) for posting and then click the **OK** button.

Last Name	Eirst Name	Tupe	
Ackerman	Joseph	Individual	
Ackerman	Marianne	Individual	
Ackerman	Kenneth	Individual	
Ackley	John	Individual	
Ackerman	Kathleen	Individual	
and County F			

Note: The additional contact selected displays on top and the Source displays as SmartOffice.

Sn	hartMail for Lotus	Notes - SmartOffic	e	×		
	Request Mail	M 😭 🕅 📬				
	Source	Contact	E-Mail Address	Туре		
	☑ SmartOffice ☑ To ☑ Bcc	Ackerman, Joseph Ace Building No contact found.	JAckerman@bobbisnet.com test@ez-data.com user@test-vahoo.com	Individual Business		
	From From	John Ackley	maria@premiertedomain.com	Individual		
	4					
Mark E-Mail Private in SmartPad						
	Total Contact(s): 4					
		E	Post <u>C</u> ancel			

7. To post e-mail to a contact's Key Relations, select the contact and then click the **Key Relations** button.

SmartMail for Lotus Notes - SmartOffice							
	Request Mail			M 😭 🕅 🐂			
	Source	Contact	E-Mail Address		Delever (Alter)		
	🗖 To	Ace Building	test@ez-data.com	Business	Helations (Alt+N)		
	Bcc	No contact found.	<u>user@test-yahoo.com</u>				
	From From	John Ackley	maria@premiertedomain.com	Individual			
	4			•			
	Mark F-Mail Priva	te in SmartPad					
	Total Contact(s): 3						
		<u> </u>	<u>Cost</u>				

8. Select the Key Relation(s) for posting and then click the **OK** button.

SmartMail for Lotus Notes - Contact Key Relation(s)						
				*		
	 Contact Name 	Greeting	Relation			
	🗹 Dr. Randall C. Halve	Randy	Associate			
	Miss Marianne Acker	Marianne	Daughter			
	Mr. Joe Halverson	Joe	Associate			
	Mr. Kenneth Ackerm	Ken	Son			
	Mrs. Kathleen M. Ac	Katie	Wife			
	•			►		
	Record Count :5					
	<u>0</u> K	<u>C</u> ancel				

9. The selected Key Relation displays in the Request Mail dialog box with the Source as KeyRelation.

SmartMail for Lotus Notes - SmartOffice 🛛 🛛 🔀						
Request Mail 🦛 🖓 🐂						
Source	Contact	E-Mail Address	Туре			
SmartOffice	Ackerman, Joseph Dr. Randall C. H Ace Building	JAckerman@bobbisnet.com test@ez-data.com	Individual Individual Business			
From	No contact round. John Ackley	<u>user@rest-yanoo.com</u> maria@premiertedomain.com	Individual			
Mark E-Mail Pri <u>v</u> ate in SmartPad						
Total Contact(s): 5						
<u>P</u> ost <u>C</u> ancel						

10. To post e-mail to a contact's pending case, select the contact and then click the PCM button.

Sm	artMail for Lotus I	Notes - SmartOffic	e		×	
	Request Mail			M 🙈 🕅	\$ 4	
	Source	Contact	E-Mail Address	Туре	Pendir	ng Case Mangement (Alt+P)
	To Bcc	Ace Building No contact found.	test@ez-data.com user@test-yahoo.com	Business		
	From	John Ackley	maria@premiertedomain.com	Individual		
	4					
	Mark E-Mail Pri <u>v</u> a	te in SmartPad				
	i otal Contact(s): 3					
		Ē	ost <u>C</u> ancel			

Note: The PCM button will not be available if the user currently logged into SmartOffice does not have the appropriate user rights.

martMail for Lotus	Notes - Pending C	ase(s) for Ackern	han, Joseph
▲ Policy#	Plan Name	Carrier Name	Status
AK20392	American Level 10	ABC Life	Inforce
B546892	Business Owner'	BWN Financial	Active
D P325166	Total Coverage	ABC Life	Inforce
S823490	Preferred Life	20th Century Lif	Submitted
×			
Total Pending cases:	4		
	ОК	Cancel	

11. Select the Pending Case for posting and then click the **OK** button.

Note: Only one pending case can be selected for posting. The mail will be posted to the Policy Notes and the Activity E-Mail section for the Policy/Pending case.

12. Select the **Mark E-Mail Private in SmartPad** option to mark the e-mail as private in the SmartPad. Click the **Post** button to copy the e-mail to the SmartPad of the selected (checked) contacts, their Key Relation(s) and pending cases (if selected).

SmartMail for Lotus Notes - SmartOffice 🛛 🛛 🔀							
	Request Mail			M 😭 🕅 🐂			
	Source	Contact	E-Mail Address	Туре			
	SmartOffice	Ackerman, Joseph	JAckerman@bobbisnet.com	Individual			
	✓ KeyRelation	Dr. Randall C. H		Individual			
	To To	Ace Building	test@ez-data.com	Business			
	Bcc	No contact found.	<u>user@test-yahoo.com</u>				
	From	John Ackley	maria@premiertedomain.com	Individual			
Mark E-Mail Private in SmartPad							
Total Contact(s): 5							
		<u> </u>	Post <u>C</u> ancel				

Note: The **Mark E-Mail Private in SmartPad** option will be disabled if the user logged into SmartOffice does not have the **Record Privacy** rights or if the Enterprise View is turned on.

13. In the SmartOffice SmartPad, the user can access the original e-mail using the Open Link button. (Customize the layout to display the Open Link column, if necessary).

Posting Messages to the SmartPad from SmartOffice

 In SmartOffice, open the Details tab of the appropriate contact and then click the Compose E-mail button.
 Joseph M. Ackerman (Joe) (Spouse: Katie)

Personal Information		Phone Number	Compose E-mail F9	+14			
Last Name Ackerman	Suffix	Туре	Full Phone	Remarks			
First Name Joseph	Middle M.	Residence	e (626) 799-2951				
Greeting Joe	Title Dr.	Business	(310) 309-0948#1	152			
Type Client	Sub-Type A		(010) 577 0007				

2. Determine if the message being sent is to the selected contact or to the selected SmartOffice user(s) regarding the selected contact.

🖉 SmartOffice	×						
Compose Mail Options							
 Is this message regarding the current contact? Is this message to the current contact? 							
Users							
Select one or more users to receive the e-mail. Click the following check-box to select more than 4 users.							
User-1							
User-2							
User-3							
User-4							
🔽 I want to select Additional Users.							
OK Close							

Note: When the "Is this message regarding the current contact?" opton is selected, the current contact will not be the recipient of the mail. Only the e-mail address of the users will display in the compose window.

3. The Lotus Notes New Memo tab displays with the e-mail addresses of the recipients of the e-mail.

	🔞 Welcome 🔞 Maria jose - Inbox 🗙 😭 Request Mail 🗙 🚱 New Memo 🗙	
\bigotimes	Send Send and File Save As Draft Address Delivery Options Tools 🔻	
1	Maria jose/premierdomain To	Admin <admin@ez-data1.com></admin@ez-data1.com>
3	01/23/2006 06:26 PM	
Ň	bcc	
) ~	Subject	Re: Joseph M. Ackerman
T		

Note: Any e-mail message composed from Lotus Notes can be posted to the SmartPad while the user is logged into SmartOffice. When the user clicks the Send button in Lotus Notes, a "Would you like to post the e-mail to SmartPadTM?" message displays. Select **Yes** to open the Request Mail dialog box listing the SmartOffice contacts and recipients' e-mail addresses.

4. The e-mail is posted to the SmartPad of the selected contact(s) in SmartOffice.

Posting Messages to Policies/Pending Cases from SmartOffice

1. In SmartOffice, open the Details tab of the appropriate Policy or Pending Case and then click the Compose E-mail button. - I OFCOZA LIS- Evin Reals

Issued - 856974 - Life - Erin Basinger - Preferred Life - 20th Century Life Insurance								
Summary Detail (P) Underwriting Delivery (G) Advisor Re	quests Riders/Reinsurance Compose E-mail F9							
Status and Dates	Premium Information							
Status/Status Date Issued 01/10/2005 Signed 11/30/2005 Image: Submitted 12/05/2004 Image: Submitted All Reg In 12/21/2004 Image: Submitted 12/30/2004 Image: Submitted Issued 01/10/2005 Image: Submitted Delivered Image: Submitted Inforce Image: Submitted Image: Submitted Image: Submitted Image: Submitted	Modal Premium 400.00 Prem Mode Quarterly Pay Method Check Annizd Prem 1,600.00 Target Excess Prem Lump Sum 1035 Comm Modal 400.00 Comm Annizd FYC Renewal							
Basic Policy Information	Policy Advisor Summary + 1 Advisor Interest							
Policy# 856974 Case # Case Unique ID 66054-1601 Carrier 20th Century Life Insurance	Primary Advisor Carolina Christiansen 100.00							
Plan Name Preferred Life Plan Type Term Sub-Type	Policy Insured Summary + 1 2 4 1 4 1 4 1 4 1 4 1 4 1 4 1 4 1 4 1							

Note: E-mail can be composed from only one Policy or Pending Case at a time.

2. Determine if the message being sent is to the selected contact(s) related to the current case/policy or to the selected SmartOffice user(s) regarding the current case/policy.

SmartOffice The contacts listed below are related to the current Case/Policy. Select the contacts to whom you would like to send a letter. Case Information Case Office Maria Policy # 856974 Case # Plan Name Preferred Life						
Related	I Contacts					
	Contact Name	Role				
	Basinger, Erin	Primary Contact				
	Basinger, Erin	Primary Insured				
	Basinger, Erin	Owner				
	Basinger, Erin	Payor				
	Christiansen, Carolina	Primary Advisor				
	Able, Christian Adam	Advisor's Supervisor				
	McCoy, Harry	Underwriter				
	20th Century Life Insurance	Carrier				
Compose Mail Options Compose Mail Options Send a message to the Selected Contact(s). Send a message to SmartOffice User(s) regarding the current Case/Policy.						
OK Cancel						

Note: When the "Send a message to SmartOffice User(s) regarding the current Case/Policy" is selected, the current contact will not be the recipient of the e-mail. Only the e-mail addresses of the users will display in the compose window.

3. The Lotus Notes New Memo tab displays with the e-mail addresses of the e-mail recipients. When the e-mail is sent, it will be posted to the Activity Mail tab and the Policy Notes of the selected recipient(s) in SmartOffice automatically.

Issued - 856974 - Life - Erin Basinger - Preferred Life - 20th Century Life Insurance

								🤇	◗◐▯▯ਸ਼ <u>ਸ਼</u> ਸ਼ਸ਼	l 🔤 🥠 »
<u>S</u> ummary	Detail (P)	Underwriting	Delivery (G)	Advisor Re	quests	Riders/Reinsurance	Activity/Mail (Z)	Letters/Documents	Policy Transactions	tan
Pending (Pending Case Activity Summary + 🕆 🏹 🖉 🗒 🦼									<u>.</u>
🔲 Start	Date 🕆 🛛 Con	itact Name	Star	rt Time 🛛 Ty	уре	Sub-Type	Subject	Reason		Status
•										•
E mail Inf	ormation									2 - 7 (2 m
L-mail mi	ormation									
Se Se	nt Date	Sender		Re	cipient		Sub	ject		Post
01.	/28/2006 12:02	2AM maria@p	remiertedomain.c	com Ad	lmin ≺so-n	ne@ezd.com>	Re: 1 8569	Erin Basinger; 20th Centur 974	y Life Insurance; 66054-1601;	<mark>₽</mark>