



# SmartOffice<sup>®</sup>

**Professional Edition for Insurance Professionals**

**The #1 Practice  
Management Solution for  
Insurance Brokers and Agents**



### Take your business to the next level

As a financial services professional, your goal is to build trusted client relationships that result in new and follow on business. Do you have the tools you need to reach your business potential?

Smart Office Professional Edition can help you take your business to the next level. An easy to use solution from Ebix, SmartOffice Professional Edition provides the tools you need to attract and retain high net worth, high revenue clients by meeting or exceeding their expectations.

Packed with ways to help you save time and manage every aspect of your client relationships, the web based SmartOffice solution requires no software installation and gives you immediate access to the information you need anytime, anywhere.

### Software built for the way you do business

If you have been using a generic contact management tool to run your business, SmartOffice Professional Edition will be a welcome change. Developed in partnership with industry professionals, SmartOffice is designed to address the very specific needs of your business.

#### Marketing and Sales

Identify and act upon opportunities with new and existing clients.

#### Customer Service

Deliver consistent value to retain happy clients and generate referrals.

#### Business Organisation

Transform your entire business into a manageable, shareable framework.

#### Reporting

Provide your clients with consolidated financial reports.

#### Compliance

Maintain comprehensive client journals that include e-mail communication, document history and all relevant attachments.



SmartOffice offers easy to use solutions to address the challenges of relationship management, insurance policy tracking and client service to help you build and maintain profitable relationships with your clients.

## Features Overview

### Contact Management

**Client and account tracking** helps you manage and utilise valuable information such as corporate, personal, family, business and key relations.

**Policy Tracking** provides visibility into all types of policies and lets you view policy information globally or by individual client.

**Account Tracking and History** helps schedule and track the history of all client activities. You can easily log appointments, phone calls, projects and associated action items, as well as receive prompts for scheduling follow up actions. Auto alerts provide call and appointment reminders.

**Microsoft Outlook Integration** allows Outlook users to automatically post outgoing and incoming Outlook e-mails to each client's SmartPad, providing a complete communication history, including all attachments, without the hassle of double entry.

**Document Tracking** makes it easy to create an electronic document trail by capturing and attaching them to the client's record in SmartOffice. A single click launches virtually all Windows compliant document and image file types.

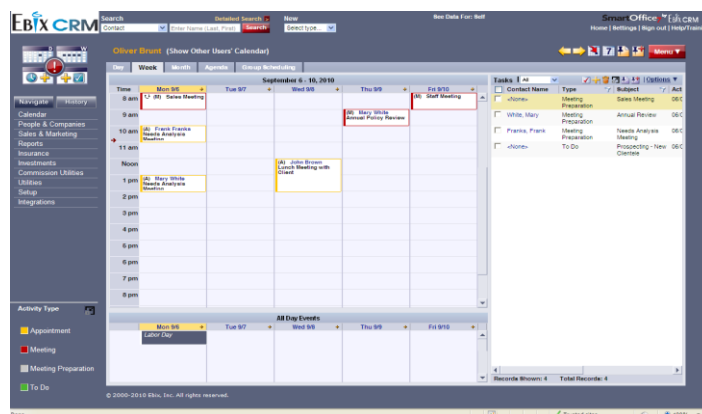
**Advanced Searching** makes it fast and easy to search for individuals or businesses by partial name, lead source, phone number or TFN. It supports a multitude of additional fields, including city, state, post code, policy number and more.

### Mobile Solutions

**SmartOffice Mobile** gives you anytime, anywhere access to your SmartOffice data on a Palm, Pocket PC or note book computer, making it easy to manage your calendar, keep track of contact information, capture meeting outcomes and quickly locate policy and investment information for each client.

**Smart PDA** provides the ability to access the power of SmartOffice from your handheld, mobile browser such as a BlackBerry, iPhone or iPad.

**Calendar/Time Management** provides day, week and monthly views, group and resource scheduling and appointment and event planning. You can quickly view unfinished and overdue projects, print a daily, weekly or monthly itinerary or find a block of time available for a meeting.



# SmartOffice®

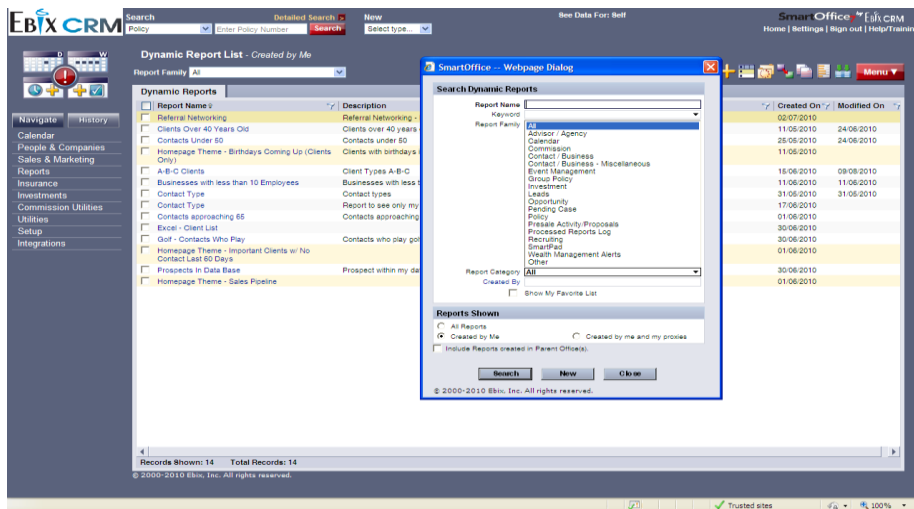
## Professional Edition



### Sales

**Sales Opportunity Tracking** helps track and manage every sales opportunity. A detailed opportunities dash board provides instant visibility into each opportunity to determine the best course of action. Views include opportunity specific activities and communication, where each opportunity falls within the sales pipeline and how actual results compare to the sales forecast.

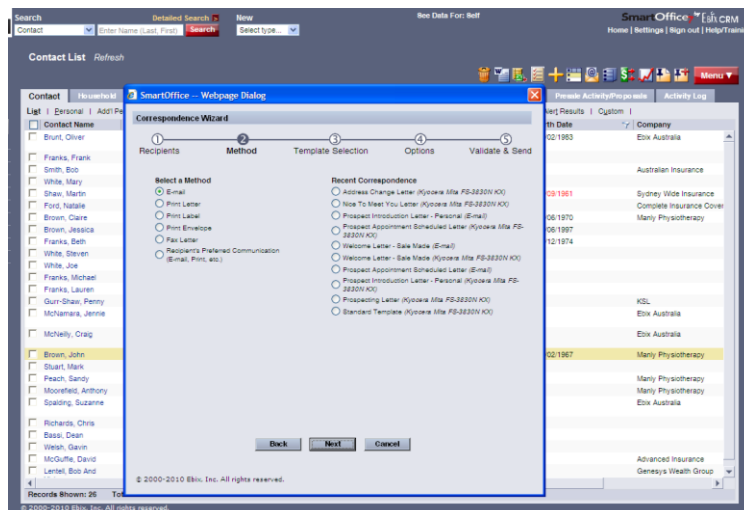
**Management Reporting** lets advisors easily create standard and custom management reports to provide visibility into operations. From the amount of sales activity taking place, to new investment dollars being acquired, to the flow of pending cases through the firm, advisors can gain an understanding of where to focus their attention. To simplify the reporting process, reports run in SmartOffice can be moved directly into Excel.



### Marketing

**Marketing Profiling & List Management** drives more effective marketing, generating target lists by cross referencing various kinds of information using dynamic filters and customised sets. Staff can kick off targeted marketing campaigns via mail, e-mail, fax and telephone to help drive future business.

**Mass E-mail/Direct Marketing** is facilitated with user defined contact sets that generate and print mail merge letters or broadcast email/faxes based upon client/prospect preferred communication methods.





## Getting started is as easy as 1-2-3

### Step 1:

#### Convert your existing data

Fast accurate data conversion from your existing software is the key to helping you get the most from SmartOffice right away. Ebix CRM offers standard conversions from a variety of systems, including Client Data System (CDS), ACT, Advisors Assistant, FDP Contact Partner, GBS, Goldmine and Microsoft Outlook. We can also convert your data from almost any other data system.

### Step 2:

#### Learn the SmartOffice Basics . . . and more

You can start using SmartOffice right away. The web based solution requires no installation. And while the system is very intuitive, Ebix's training options will help you get the most from every system feature.

#### SmartStart Training

SmartStart is a pre-packaged, automated training tool designed to help your team quickly and easily learn the most valuable features of SmartOffice for their unique role. SmartStart gives users confidence in the solution and help them start seeing benefits right away, all at no additional cost.

#### On-Demand Online Training Library

SmartOffice comes with an extensive library of on-line training videos that can be accessed from your own computer 24 hours a day, 7 days a week. Pre-recorded courses – from introductory to advance concepts – provide the guidance you need to get the most from your SmartOffice solution.

#### Instructor Led Online Training

For teams kicking off an office wide SmartOffice implementation or for periodic refresher courses, you may prefer a tailored, interactive training session in which students follow along with the instructor from the comfort of their desk.

### Step 3:

#### Ongoing Commitment

No matter how user-friendly a solution is, learning a new system can sometimes feel daunting. That's why Ebix offers unlimited access to its experienced, knowledgeable and friendly support team. You can contact them via telephone or e-mail to get the answers you need, when you need them.



#### SmartOffice Orientation

It all begins here! SmartOffice Orientation covers everything you will need to know to navigate through SmartOffice and begin using your system.

#### Take a Shortcut

##### The 90 Minute Orientation

It only takes 90 minutes to get a solid foundation in SmartOffice basics. These classes will get you up and running quickly!

These classes will show you how to import contacts from other applications and provide you with helpful hints to take advantage of the powerful tools available in SmartOffice.

(Movies with the **fc** logo are SmartOffice Fast Classes, which are published every two weeks. For a complete list of Fast Classes, [click here](#).)

> Navigating in SmartOffice	
Signing In and Changing Your Password >>	4:33
Accessing Help and Training Resources >>	4:21
Using SmartOffice Navigation Tools >>	3:48
Performing a Search >>	4:56
Using the Alert Center >> <b>fc</b>	1:57
Accessing Vital Information via the Dashboard >>	8:19
Adding Content to the Home Page >>	9:59
New Navigation Features >> <b>fc</b>	8:47
The History Tab >> <b>fc</b>	3:39
Using Google Maps >>	6:50
> Working with Contacts	
Creating a New Contact >>	7:38
Working with Lists >>	6:44
Sorting a List and Adding a Pie Chart >>	6:05
Customizing a List >>	6:27