



Two types of contact assignments can be made in SmartOffice: User Assignment and Primary Advisor assignment. Contact User Assignment and Primary Advisor Assignment are two different tools designed to meet different needs.

User Assignment

Contact **User Assignment** is a security tool designed to grant contact record access to specific SmartOffice Users.

- User Assignment will only take effect if security is enabled in your office. If security is not enabled, then user assignment will not restrict any records.
- User Assignment can be made on the **Additional Personal** tab and when a record is created.
- Multiple users can be assigned to a single contact.

To Assign an existing Contact to a SmartOffice User:

- Ensure that the user has an active SmartOffice user account.
- Open the contact record to be assigned.
- Click the **Additional Personal** tab.
- Click the **Add** button on the **User Assignment** toolbar.



Figure 1: The Add button on the User Assignment toolbar.

- SmartOffice will open a screen displaying all available users. Tag all of the users to be assigned to the contact.
- Click **OK**.
- The selected users will be added to the **User Assignment** summary on the **Additional Personal** tab.

To Assign a New Contact to a SmartOffice User:

- Ensure that the user has an active SmartOffice user account.
- Click the **Assigned To** hypertext link in the new contact screen. (All new contact screens – Quick Add, Add, and Super Add, have an **Assigned To** field with corresponding hypertext link.)
- Select one user from the **Available Users** screen by clicking on the hypertext link of the user.

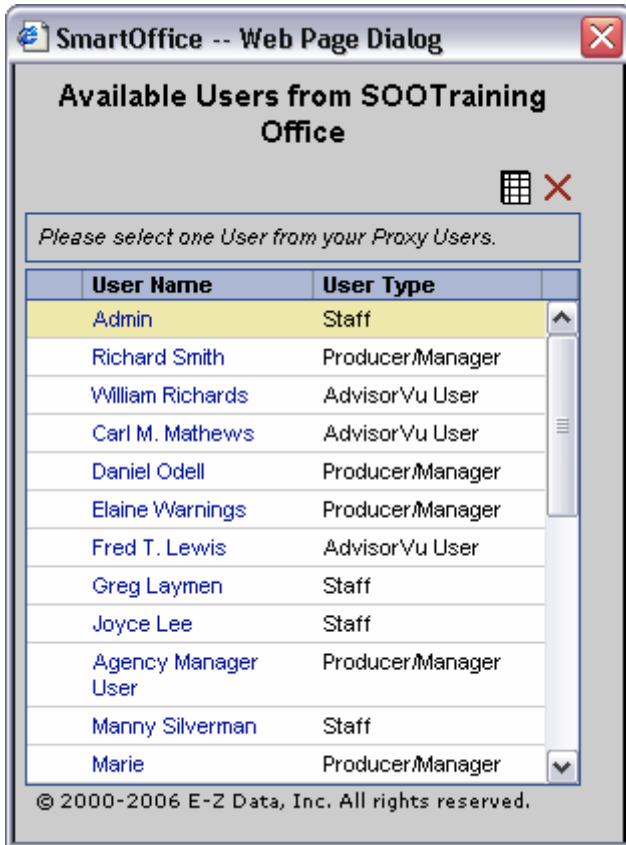


Figure 2: The Available Users screen.

*Note: During the add process, you can assign the new contact to only one user. However, once the contact record is created, you can assign the contact to additional users on the contact's **Additional Personal** tab as demonstrated earlier.*

It's important to note that if you have not enabled security, user assignments will not have any effect on record viewing privileges unless security is enabled at a later time. However, the **Assigned To** field for new contacts and the **User Assignment** section of a contact's **Additional Personal** tab will still be active and available.

Primary Advisor

Primary Advisor assignment is an organizational tool designed to enhance record organization, reporting, and correspondence features in SmartOffice as follows:

- Enhances data organization by creating an effective means of tracking client/advisor relationships.
- Increases efficiency by automatically populating advisor information when new policy, pending case, or commission records are created.
- Provides for effective contact correspondence through the use of Primary Advisor merge codes.
- Primary Advisor assignment can be made on the **Contact** detail tab and when a record is created.
- Unlike User Assignment, only one Primary Advisor can be assigned to a contact.
- Primary Advisor assignment will not affect a user's ability to see and edit records.



To Assign an existing Contact to a Primary Advisor:

- Ensure that the advisor has an Advisor record in SmartOffice.
- Open the contact record to be assigned.
- Switch the contact record to **Edit Mode**.
- Use the **Primary Advisor** field in the **Personal Information** section of the contact detail tab to search for the primary advisor.
 - Either enter the name of the advisor using the Last Name, First Name search convention and click the **Primary Advisor** hypertext link or leave the **Primary Advisor** field blank and click the **Primary Advisor** link for more Advisor search features.

The screenshot shows a web page dialog titled "SmartOffice -- Web Page Dialog". It contains several sections: "Advisor/Agency Search Option" with radio buttons for "Advisors Only", "Agencies Only", and "Both Advisors and Agencies" (which is selected); "Search Advisors/Agencies" with input fields for "Name", "Source", "SS# (Tax ID)", and "Contract No.", and a button "Click here for Advanced Search Options"; "Filter" with a "Filter" input field; "Set" with a "Set" input field; and "Search" and "Close" buttons at the bottom. A copyright notice "© 2000-2006 E-Z Data, Inc. All rights reserved." is at the bottom left.

Figure 3: The Available Users screen.

- If more than one advisor meets your search criteria, select the correct advisor when prompted.
- The selected advisor will be added in the **Primary Advisor** field.
- Save the contact record and switch the record to **Read Only** mode to preserve data integrity.

To Assign a New Contact to a Primary Advisor:

- Ensure that the advisor has an Advisor record in SmartOffice.

- Use the **Primary Advisor** field on the new contact screen to search for the primary advisor. (All new contact screens – Quick Add, Add, and Super Add, have a **Primary Advisor** field with corresponding hypertext link.)
 - Either enter the name of the advisor using the Last Name, First Name search convention and click the **Primary Advisor** hypertext link or leave the **Primary Advisor** field blank and click the **Primary Advisor** link for more Advisor search features.
 - If more than one advisor meets your search criteria, select the correct advisor when prompted.

Important Note: If there is only one advisor in your practice, assigning a Primary Advisor is not necessary.

