June 25, 2004

Fast▪Class File

SmartOffice

Volume 18: Contact Super Add

In addition to adding a new contact to SmartOffice, the contact **Super Add** button allows you to create related contacts, add household information, link key relations, and create a SmartPad entry when creating the new contact record.

To create a new contact using the Super Add function:

- Click on the **Super Add** button in the **Individual Contact Summary** screen or from an individual Contact record.

Figure 1: The Super Add button in the Individual Contact Summary screen.

- Enter contact information in the standard **Contact Add** section of the **Super Add** screen.
- Use the series of buttons at the bottom of the standard **Contact Add** section to add additional information and link contacts to the new primary contact.

Figure 2: The additional Add buttons in the Super Add screen.

To add an additional contact with a relationship to the new primary contact:

- Click the **Add Additional Contact** button.
- SmartOffice will display a prompt to copy contact information from the new primary contact to the additional contact.

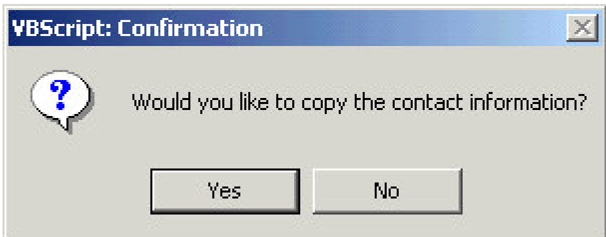


Figure 3: The Super Add confirmation screen.

- Click the **Yes** button to add information such as last name, residence address, and residence phone number to the **Additional Contact** section.
- The **Additional Contact** section includes a **Relationship** field to define the relationship of the additional contact to the new primary contact in the **Super Add** screen.

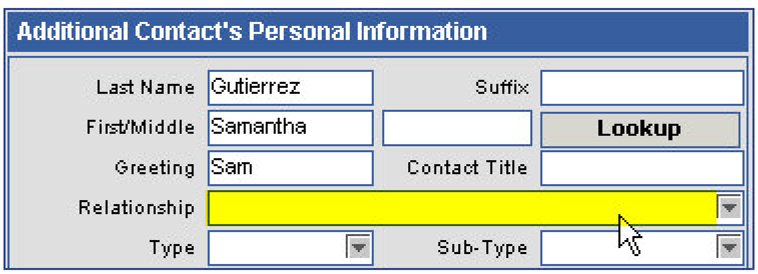
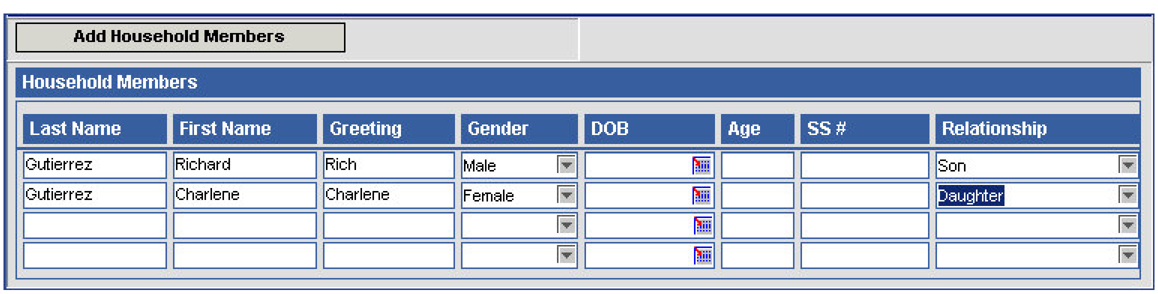


Figure 4: The Relationship field in the Additional Contact section of the Super Add screen.

- Add other information as available for the additional contact. Information not added in the **Super Add** screen can be added to the contact record in edit mode after the record is created.

To add household members for the new primary contact:

- Click the **Add Household Members** button.
- Add household member information as available.


Add Household Members

Household Members

Last Name	First Name	Greeting	Gender	DOB	Age	SS #	Relationship
Gutierrez	Richard	Rich	Male				Son
Gutierrez	Charlene	Charlene	Female				Daughter

Figure 5: The Add Household Members section of the Super Add screen.

- Define the relationship of household members to the new primary contact with the **Relationship** drop down fields.

SmartOffice will create new contact records for individuals added in the **Add Household Members** section of the **Super Add** screen. Household members will be linked to the new primary contact on the **Household** tab and the **Key Relations** tab of the new primary contact's contact record.

To create household information for the new primary contact:

- Click the **Add Household Information** button.
- Add household information as available.

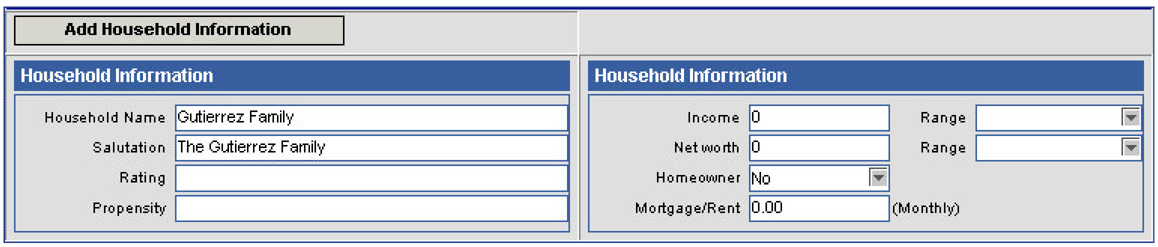


Figure 6: The Add Household Information section of the Super Add screen.

Information added in the **Add Household Information** section of the **Super Add** screen will appear on the **Household** tab of the primary contact in the **Super Add** screen. New information can be added to the contact's **Household** tab by switching the contact record to edit mode after the contact record is created in SmartOffice.

To link professional advisors to the new primary contact:

- Click the **Add Professional Advisor** button.
- Add advisor information as available.

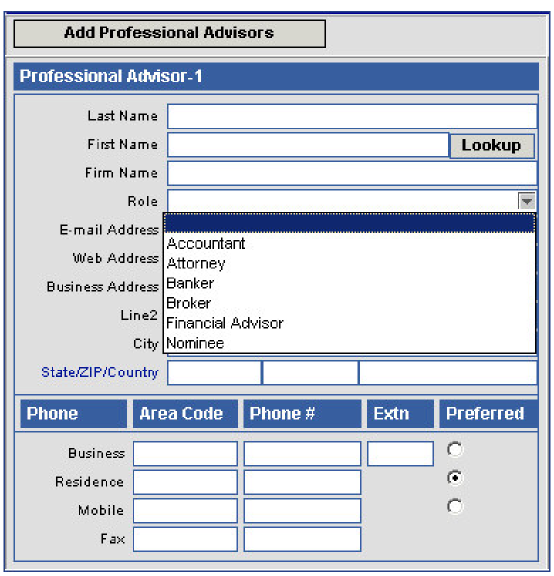


Figure 7: The Add Professional Advisor section of the Super Add screen.

Information for two advisors can be added during the Super Add process. The **Lookup** button in the **Professional Advisor** section can be used to find and link an existing contact in SmartOffice to the new primary contact. If the advisor does not exist in SmartOffice, a new contact record will be created for the advisor based on information entered in the **Add Professional Advisor** section of the **Super Add** screen.

The relationship of the advisor to the new primary contact can be defined using the role choices (Accountant, Attorney, Financial Advisor, etc.) in the **Role** drop down in either **Professional Advisor** section. Professional advisors entered in the **Super Add** screen will be linked to the new primary contact on the contact's **Key Relations** tab.

To add an opportunity for the new primary contact:

- Click the **Add Opportunity** button.
- Use the **Campaign Name** hypertext link to link the new primary contact to a campaign in SmartOffice.
- Add other opportunity data as needed.

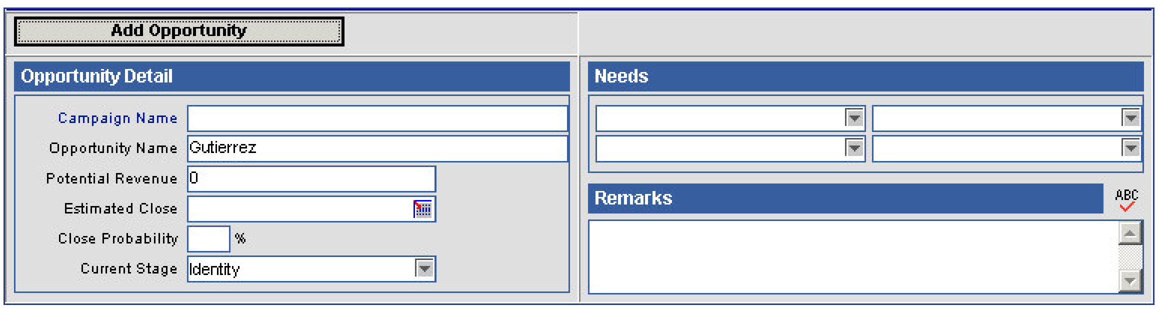


Figure 8: The Add Opportunity section of the Super Add screen.

Opportunities in SmartOffice provide a way to track a contact's needs. Contact needs may indicate potential for marketing opportunities. Based on potential, contacts may be identified as ideal candidates for a marketing campaign saved in SmartOffice. Multiple campaigns can be linked to a contact on the contact record **Opportunities** page. Information entered in the **Add Opportunity** section of the **Super Add** screen will be entered on the **Opportunities** tab of the new primary contact when the contact record is created. Opportunity information can be updated in the contact record after the contact record is created.

To add a SmartPad entry for the new primary contact:

- Click the **Add SmartPad Entry** button.
- Create the SmartPad entry for the new primary contact.

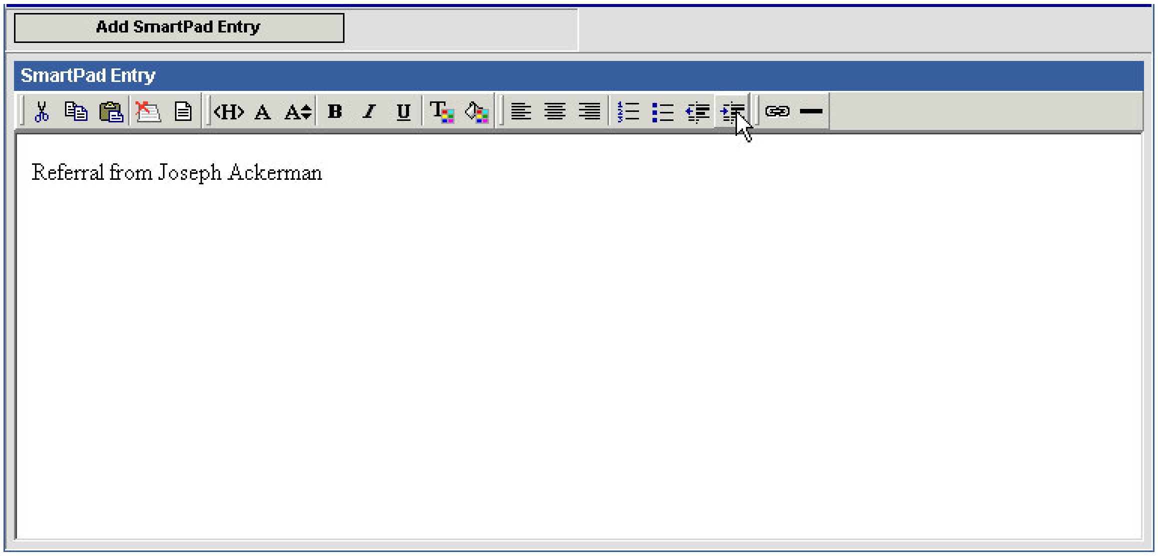


Figure 9: The Add SmartPad section of the Super Add screen.

The SmartPad entry will be added to the contact record of the new primary contact when the contact record is created.

- Click **Save and Close** to create the new contact(s) in SmartOffice or click **Save and New** to launch a new **Super Add** screen to add more contacts.