

# Fast•Class File

SmartOffice

## Volume 1.2: Record Privatization

In order to mark records as private in SmartOffice, the User Role option **Record Privatization Rights** must be enabled by the SmartOffice administrator.



Figure 1: The Record Privatization Rights User Role option in Office Settings.

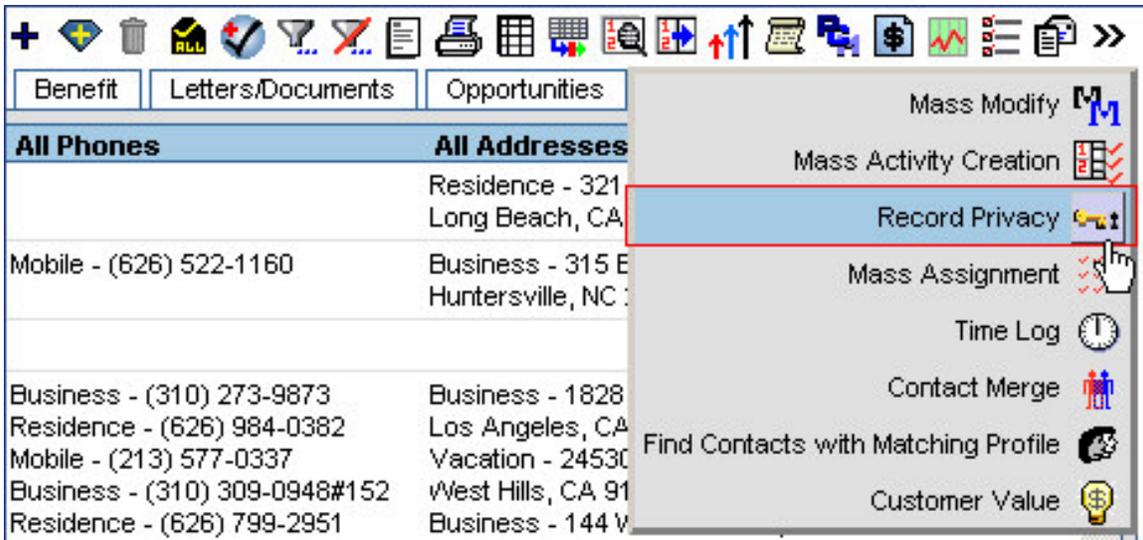
The Following record types can be marked as private in SmartOffice –

- Contact records
- Calendar events
- Form Letters
- Letters stored in a contact's Letter Log
- Documents and images stored in a contact's Document Summary

Records that can be marked as private will have a **Record Privatization** button available on the toolbar. In some cases the **Record Privatization** button will be available by moving the mouse over the **More Features** drop down button on the toolbar.



Figure 2: The Record Privatization button on the To Do toolbar of the DayView Calendar.



**Figure 3: The Record Privatization button in the More Features drop down of the Contact summary screen toolbar.**

When a user marks a record as private in SmartOffice, only that user will be able to view the private record. Viewing permission may be granted to other SmartOffice users at the time a record is marked as private.

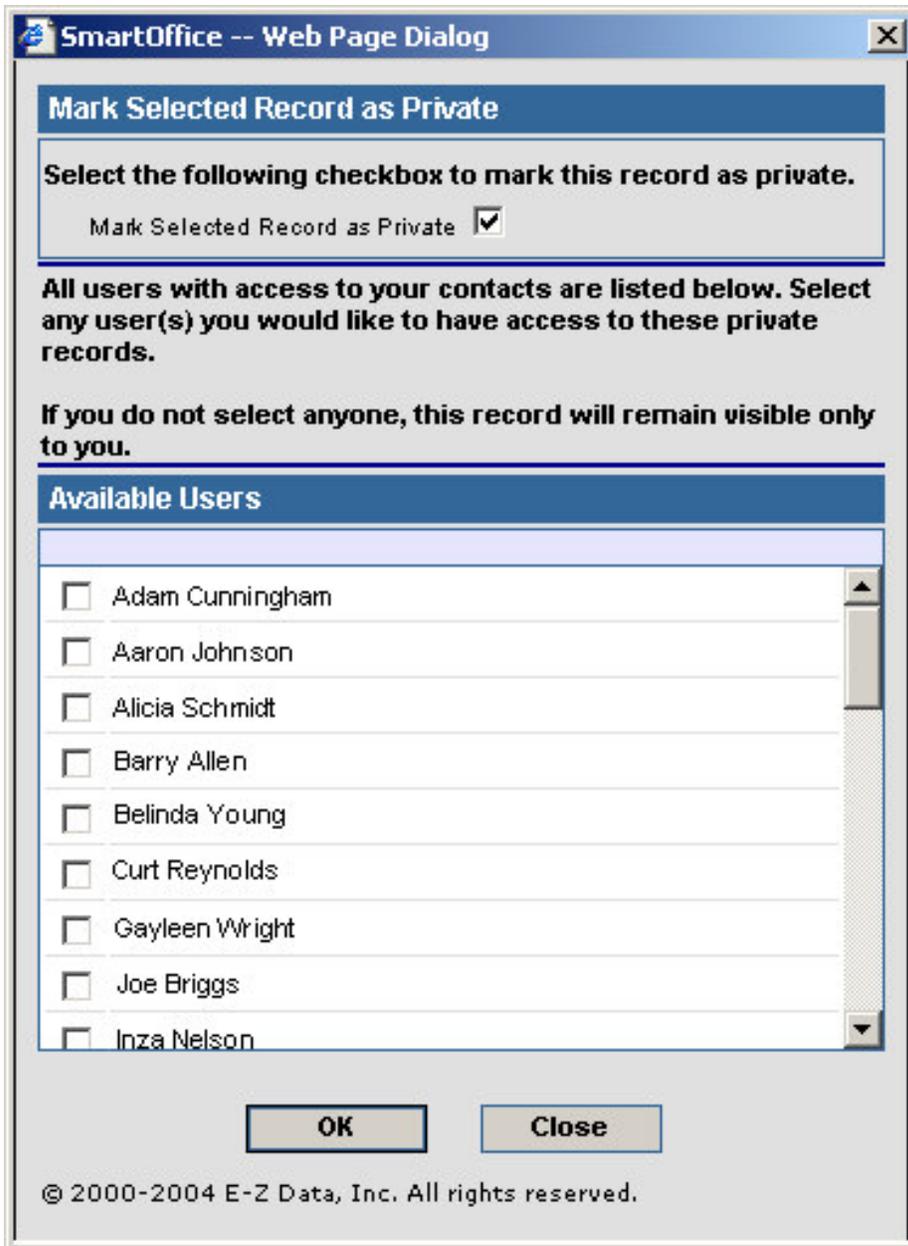
To Mark a record as private in SmartOffice –

- Select the record to be marked as private in SmartOffice by tagging the selected record. Only one record at a time may be marked as private.
- Click the **Record Privatization** button.
- Select the **Mark Selected Record as Private** option.



**Figure 4: The Mark Selected as Private dialog screen.**

- SmartOffice will open an expanded **Mark Selected Record as Private** screen allowing viewing permission to be granted to SmartOffice users with access to the users records.



**Figure 5: The expanded Mark Selected as Private dialogue screen.**

- If no available users are selected, only the user marking the record as private will be able to view the private record.
- After granting viewing permission, click **OK**.
- The record marked as private will appear with a highlighted background in the record summary screen.

**Individual Contact Summary**

Summary | Personal | Add'l Personal | Household | Key Relations | Benefit | Letters/Documents | >>

| Contact Name                             | Type      | Occupation  | DOB        | All Phones  | All Address                           |
|--|-----------|-------------|------------|---|---------------------------------------|
| <input type="checkbox"/> Adams, Frank    | Candidate | Finance     | 05/29/1968 | Residence - (626) 433-0928  | Residence - 3, Glenda                 |
| <input type="checkbox"/> Adams, Margaret | Client    | Real Estate | 03/19/1942 | Business - (626) 987-7288<br>Residence Fax - (626) 585-3550<br>Residence - (626) 962-2032 | Business - Angeles, Residenc Monterey |

Figure 6: Contact record marked as private in the contact Summary screen.