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Introduction

This guide outlines the use of the Financial Profiles+ Professional Integration module for SmartOffice® version 5.1.3 and later. The integration of this application involves efficiently importing contact, investment, and policy data from SmartOffice to the Financial Profiles+ Professional software. This module is available as a separate add-on to SmartOffice. For information on purchasing the Financial Profiles+ Professional Integration module, contact the E-Z Data Sales Department at (800) 777-9188. For more information, visit www.ezdata.com. For more information on the Financial Profiles+ Professional application, visit www.profiles.com.

Requirements for the Financial Profiles+ Professional Integration

- Financial Profiles+ v8.0 or higher
- SmartOffice v5.1.3 or higher
- SmartInvestments license
- SmartPolicies license
- Rights to the Financial Profiles+ Professional integration

Setting Up Data in SmartOffice

In order to automatically populate the fields in Financial Profiles+ Professional, the data must be entered correctly in SmartOffice; otherwise, the data will be populated inconsistently for each contact record. Data can be entered for the following:

- Client  Ensure that you have entered the client’s demographics, employer, income, life insurance, disability insurance, and investments.
- Spouse  Ensure that you have entered the spouse’s demographics, employer, income, life insurance, disability insurance, and investments.
- Dependents  Ensure that you have entered the dependent’s demographics.

Linking a Contact to a Household

Before attempting to export data to Financial Profiles+ Professional, the contact record must be linked to a Household; otherwise, the data will not be exported properly.

To Link a Contact to a Household:

1. Open the Contact record and then select either the Contact or Add’l Personal tab.
2. Click the Household tab.
3. If a household does not exist, you will be prompted to either search for an existing household or create a new one.
   a. Click the Add button to create a new household record.
   b. Click the Search button to search for an existing household record.
4. If a household exists, the Household tab will display.
5. Ensure that the This is the Primary Household of this Contact option is selected.
Setting Up Financial Profiles+

It is highly recommended that the Financial Profiles+ icon be displayed on the Desktop in order to eliminate the number of steps required to open Financial Profiles+.

To Set up Financial Profiles+:
1. Open Financial Profiles+.
2. Click Tools > Options to open the Options dialog box.
3. Click the Data Integrations tab.
4. Select the Enable SmartOffice Integration option.

Using the Financial Profiles+ Professional Integration

Once all of the data is entered in SmartOffice and the Household record is linked to the Contact, export the data to Financial Profiles+ Professional to begin working on the client’s financial plan.

To Open Financial Profiles+ Professional from SmartOffice:
1. Find the appropriate Contact record and either:
   - Select the Contact from the Contact Summary.
   - Open the Contact record and then select either the Contact or Add’l Personal tab.
2. Click the Financial Profiles+ button.
3. Click the Save button when prompted with the following dialog box. Once the file is saved, a dialog box will prompt to open the file.

Tip: Save the file to the Desktop or a location that can be easily accessed.
4. Click the **Open** button to open Financial Profiles+.

![Download complete dialog box]

Note: If this prompt does not display, open Financial Profiles+ from the Start menu.

5. From Financial Profiles+, select **File > Import/Export > Import SmartOffice Case**.

![Profiles Professional window]

Note: If the Import SmartOffice Case option is grayed out, see *Setting Up Financial Profiles+* on page 2.

6. Locate the ‘profiles.ezproxml’ file that was saved previously.
7. If this is the first time importing the file, a prompt will display to assign the asset type for each account.

8. Click the Close button to display the Financial Profiles+ home page.
9. The client’s data will be exported to the following sections within Financial Profiles+ Professional. **Tip:** Click the **View Summary Data** button to display a Summary of the data.

<table>
<thead>
<tr>
<th>Name of Hyperlink</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Data</td>
<td>Provides demographic information regarding the selected contact and his/her spouse</td>
</tr>
<tr>
<td>Dependents</td>
<td>Provides demographic information regarding dependents</td>
</tr>
<tr>
<td>Income</td>
<td>Provides Annual Income for the selected contact and spouse</td>
</tr>
<tr>
<td>Assets</td>
<td>Provides access to the selected contact and spouse’s investments</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>Provides access to the selected contact and spouse’s insurance policies</td>
</tr>
<tr>
<td>Disability Insurance</td>
<td>Provides access to the selected contact and spouse’s disability insurance policies, if any</td>
</tr>
<tr>
<td>LTC Insurance</td>
<td>Provides access to the selected contact and spouse’s long-term care insurance policies, if any</td>
</tr>
</tbody>
</table>