

Instructions  
for  
Smart Office  
Member Extraction  
to use with



**STEP 1:**

Log in to your agent portal by typing your username and password.

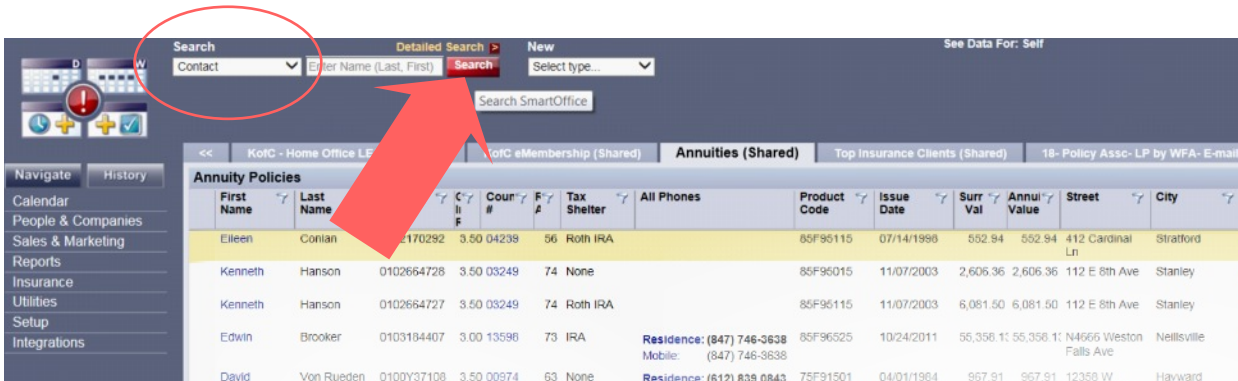
Click on **LOGIN**

**STEP 2:**

Click on **AGENT PORTAL** icon.

**STEP 3:**

Click on **SMART OFFICE** icon.



**STEP 4:**

To list all your assigned members, click on **SEARCH** button. Be sure to have the “search” drop down listing as “contact”

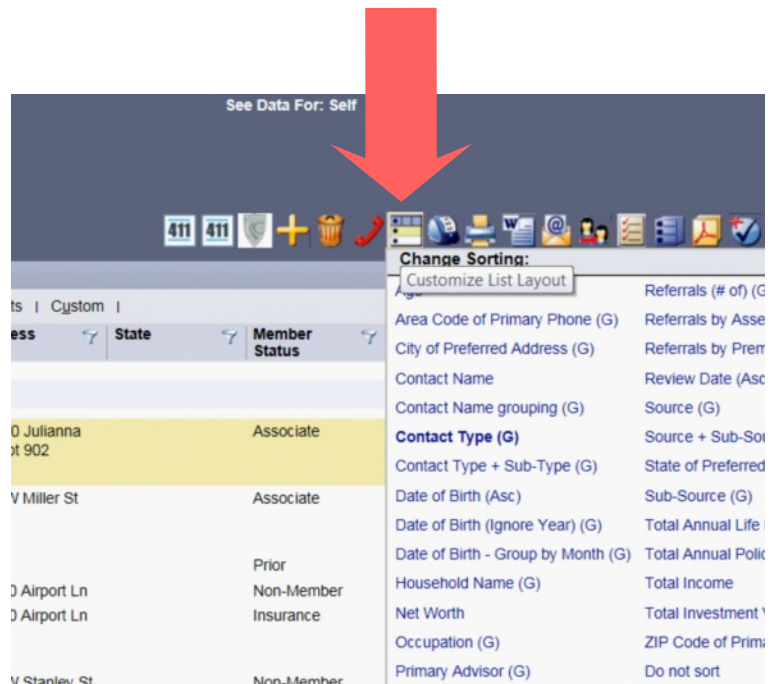
**STEP 5:**

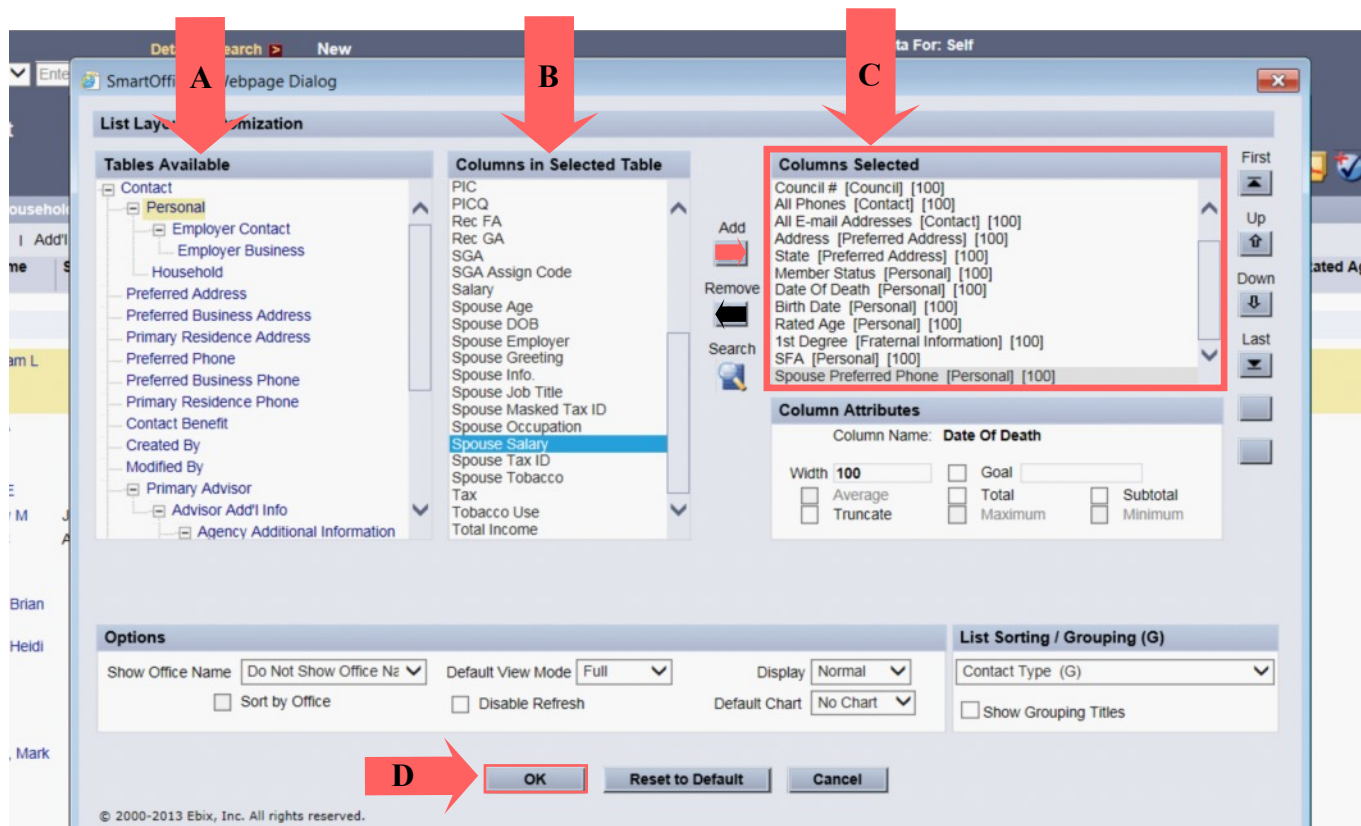
On the top right options, click:

**CUSTOMIZE LIST LAYOUT** icon



This will open up a pop-up window with extraction options.





### **STEP 6:**

The layout customization window has 3 columns. Column A serves as a “folder”, Column B lists the contents in the “folder”, and Column C lists the selected contents that will be extracted for all of your members.

If the extraction items are NOT listed under Column C, you will need to click on the “folder” in Column A, select the requested content listing in Column B, and then CLICK on the “ADD” arrow to include it in Column C. You can “REMOVE” items listed in Column C that are not needed for the master extraction.

Once all items are listed in the Column C box, follow to arrow D and CLICK “OK”

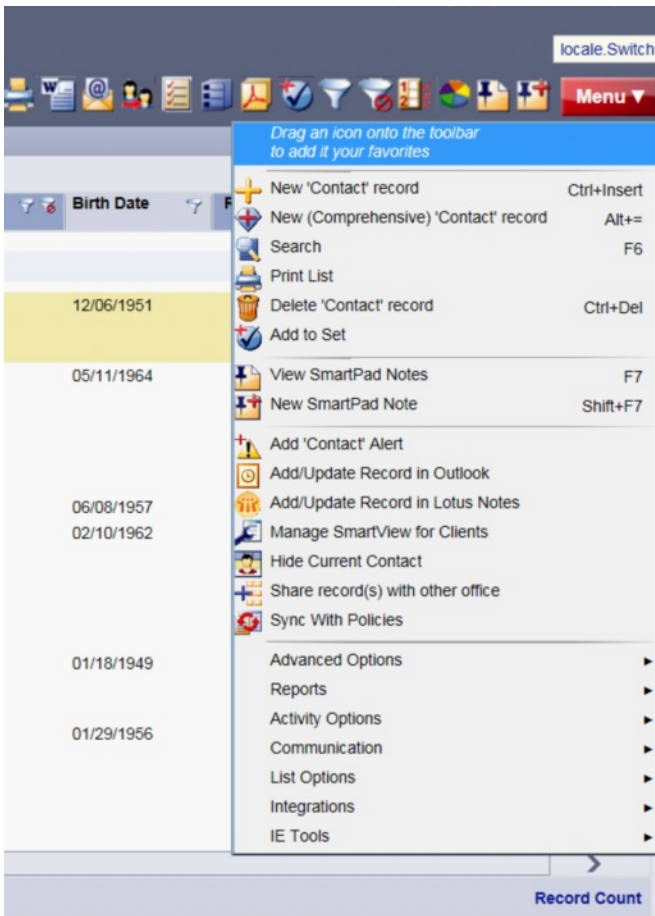
**CUSTOMIZATION LIST is on page 4.**

**READ CAREFULLY:**

Column B contains various wording for what appears to be the same type of information. Be sure to **MATCH the wording to the listing below**. Each item needs to be listed separately.

- ✓ **First Name** vs. First Name, Last Name ✗
- ✓ **All Phones** vs. Preferred Phone ✗
- ✓ **Address** vs. All Addresses ✗

<b>COLUMN A</b>	<b>COLUMN B add to C</b>
<b>Contact</b>	Title
<b>Contact</b>	First Name
<b>Contact</b>	Last Name
<b>Contact</b>	All Phones
<b>Contact</b>	Preferred Email
<b>Preferred Address</b>	Address
<b>Preferred Address</b>	City
<b>Preferred Address</b>	State
<b>Preferred Address</b>	Zip Code
<b>Personal</b>	Member Status
<b>Personal</b>	Birth Date
<b>Personal</b>	Date of Death
<b>Personal</b>	Rated Age
<b>Personal</b>	Spouse Name
<b>Personal</b>	Spouse Preferred Phone
<b>Personal</b>	SFA
<b>Fraternal Information</b>	Office Held
<b>Fraternal Information</b>	1 <sup>st</sup> Degree
<b>Council</b>	Council #

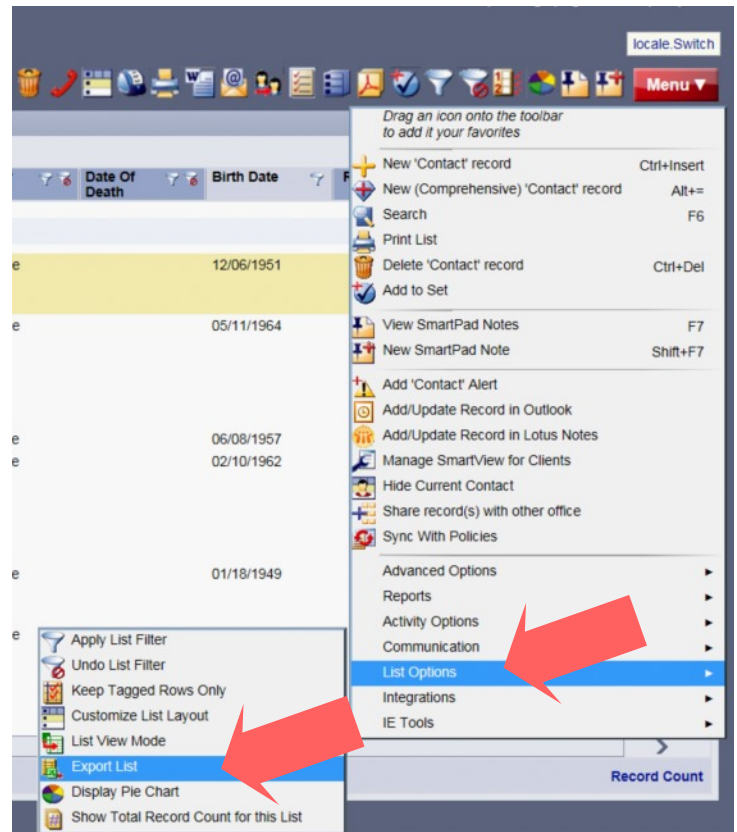


**STEP 7:**

You are ready to extract your data from Smart Office. CLICK on “MENU” to expand the drop down options.

**STEP 8:**

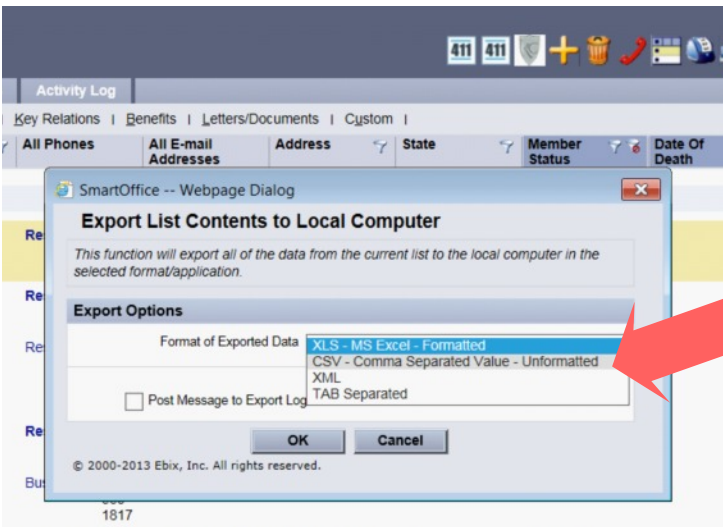
Scroll down to “LIST OPTIONS” and then select “EXPORT LIST” from the left box.



**STEP 9:**

It's time to SAVE your exported list! Select the format of Exported Data as:

**CSV-Comma Separated Value-Unformatted**

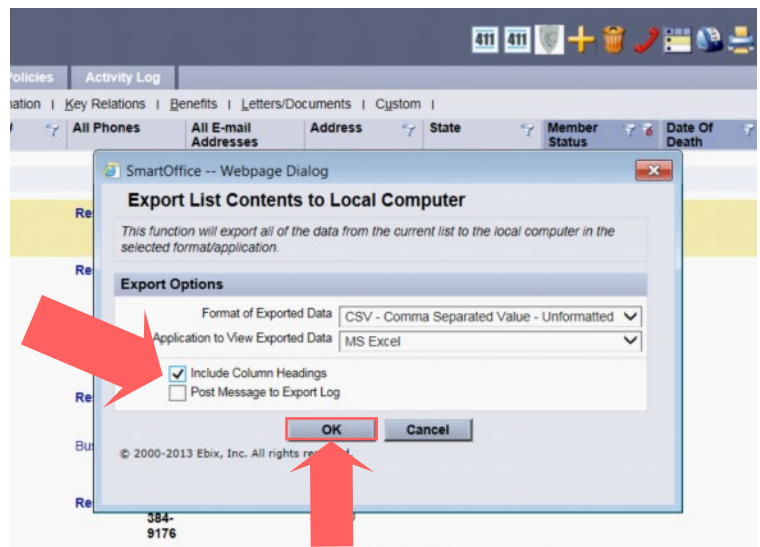


**STEP 10:**

Be sure to select:

**Include Column Headings**

Now, CLICK - **OK**



**STEP 11:**

You are ready to save your file > **SAVE AS: Agent First & Last Name Master List**

To complete your on-boarding and account set-up with SmartCalls Dialer , EMAIL the file as an ATTACHMENT with a list of your council numbers to [support@smartcallsdialer.com](mailto:support@smartcallsdialer.com)

