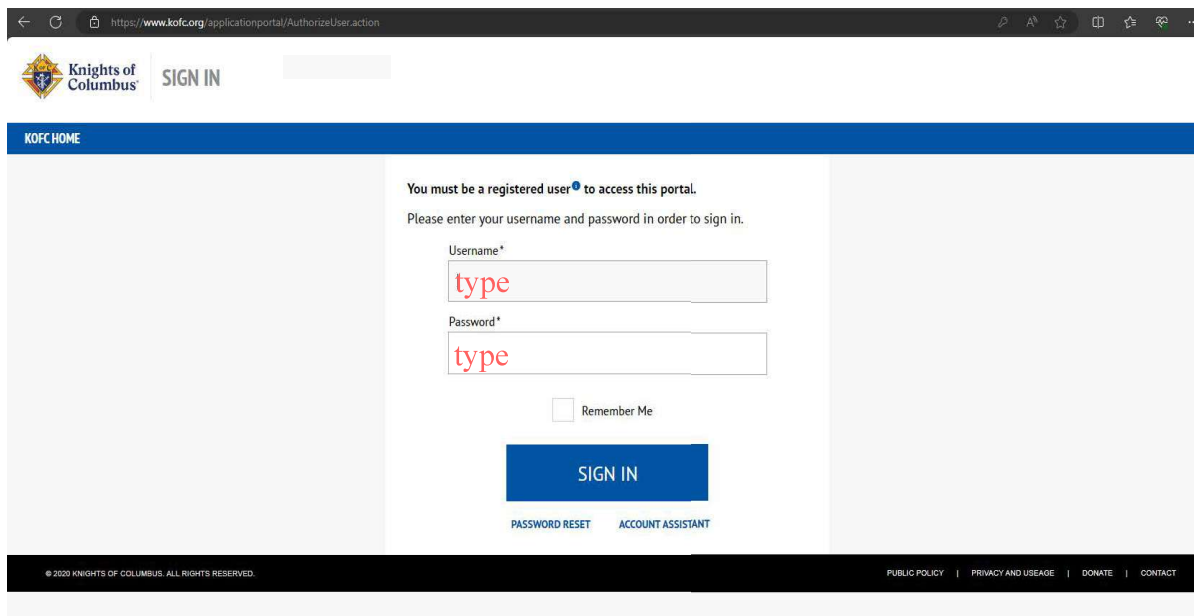# Instructions for Smart Office Member Extraction to use with

STEP 1:

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

Click on **SIGN IN**

STEP 2:

Click on **SMART OFFICE** icon.
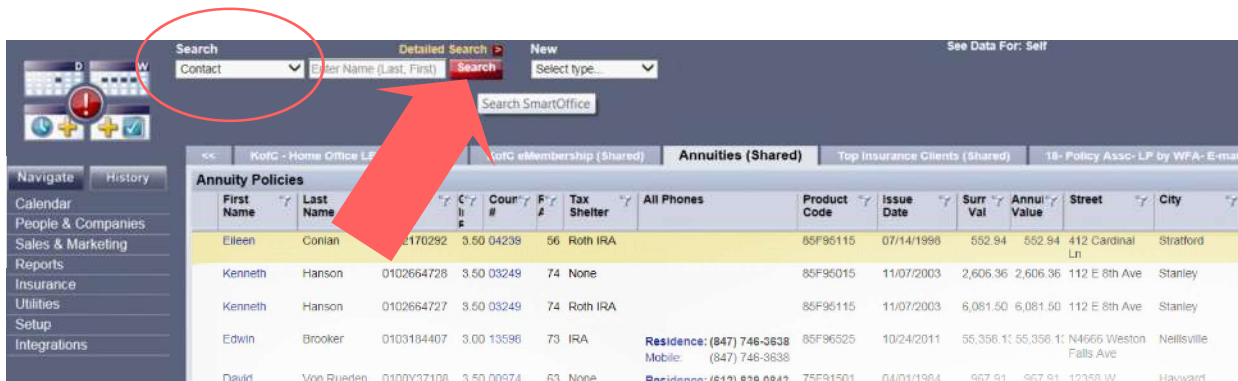
STEP 3:

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

STEP 4:

On the top right options, click:

CUSTOMIZE LIST LAYOUT icon

This will open up a pop-up window with extraction options.
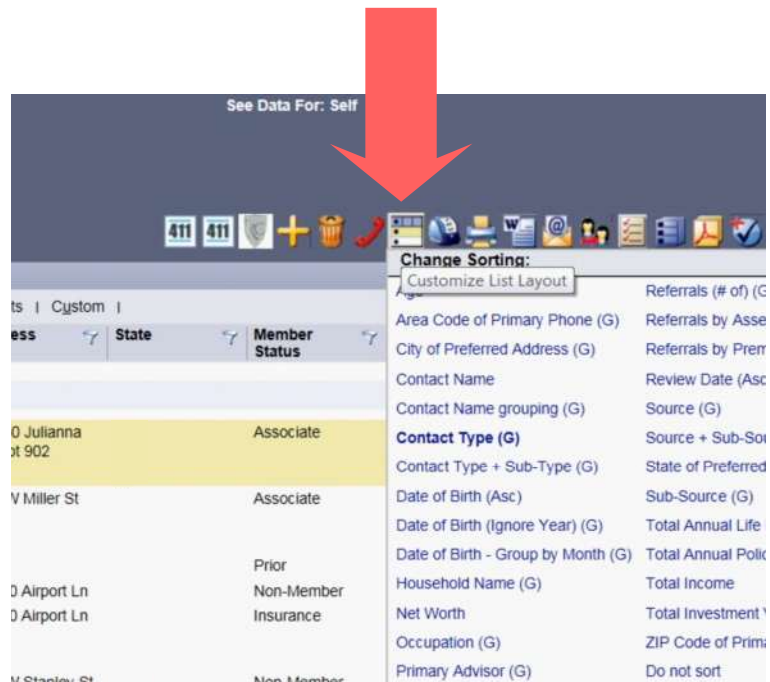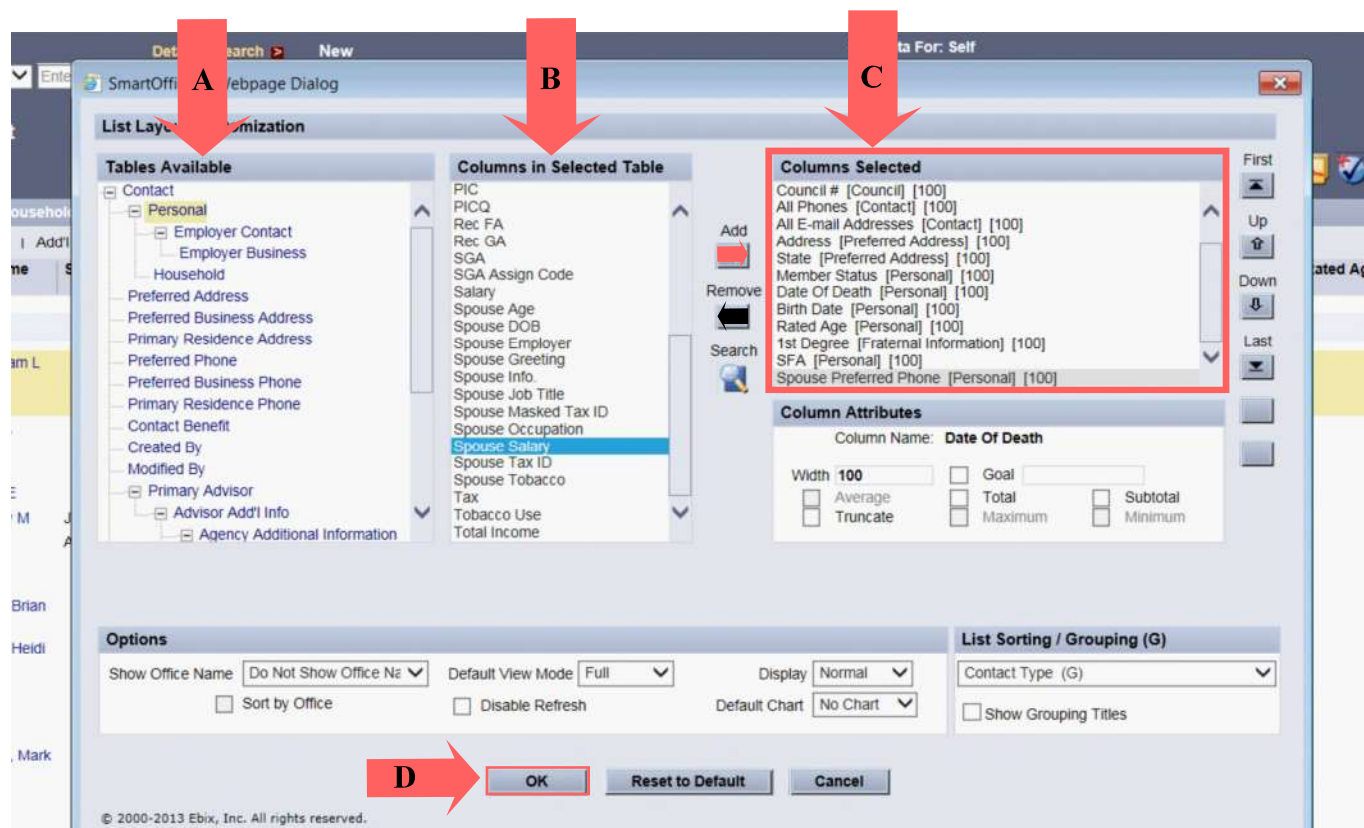
STEP 5:

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 ✗

Total of 21 columns

| COLUMN A	COLUMN B add to C
Contact	Title
Contact	First Name
Contact	Last Name
Contact	Suffix
Contact	All Phones
Contact	Preferred Email
Contact	Remarks
Preferred Address	Address
Preferred Address	City
Preferred Address	State
Preferred Address	Zip Code
Personal	Member Status
Personal	Birth Date
Personal	Date of Death
Personal	Rated Age
Personal	Spouse Name
Personal	Spouse Preferred Phone
Personal	SFA
Fraternal Information	Offices Held
Fraternal Information	1st Degree
Council	Council #
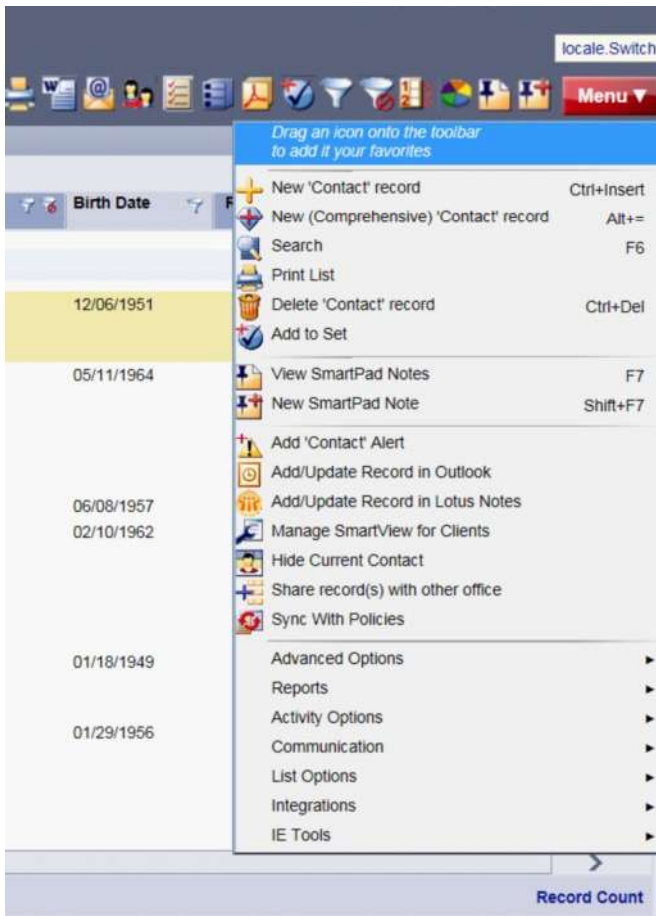
STEP 6:

You are ready to extract your data from Smart Office. CLICK on **"MENU"** to expand the drop down options.
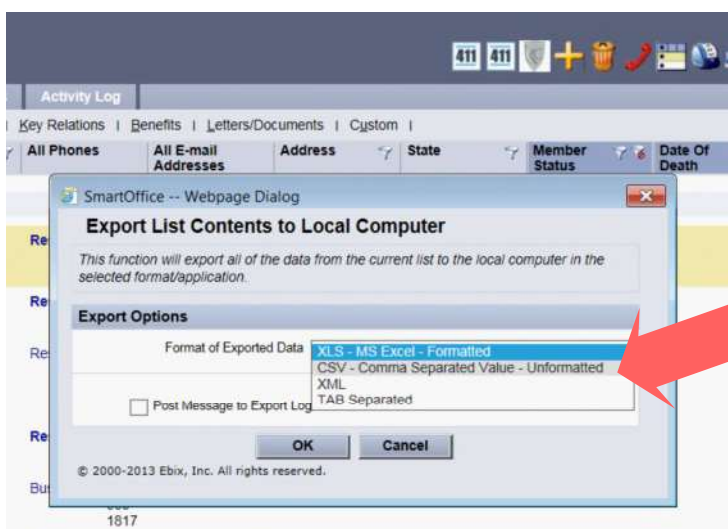
STEP 7:

Scroll down to "**LIST OPTIONS**" and then select "**EXPORT LIST**" from the left box.
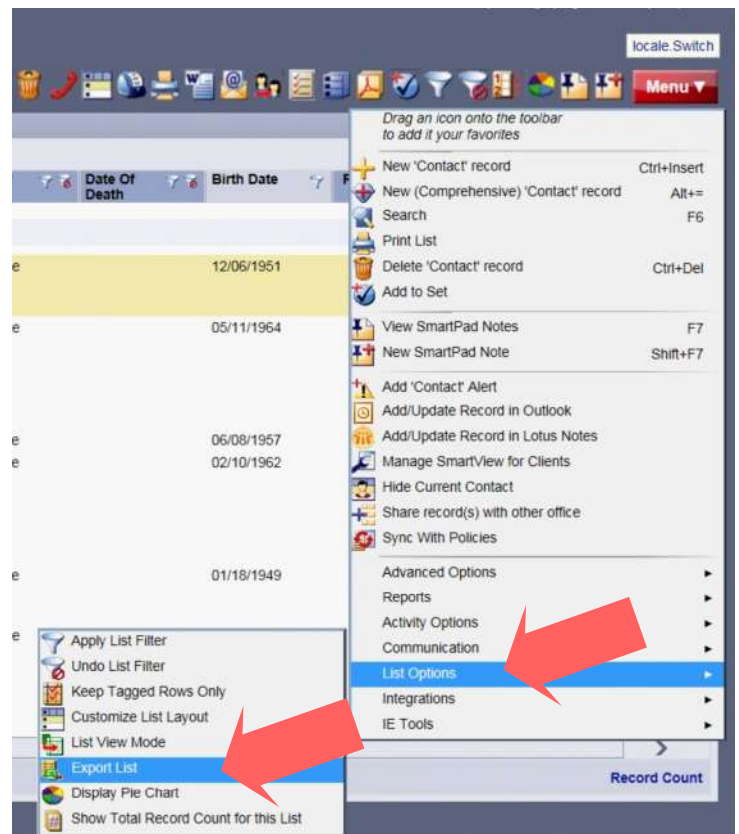
STEP 8:

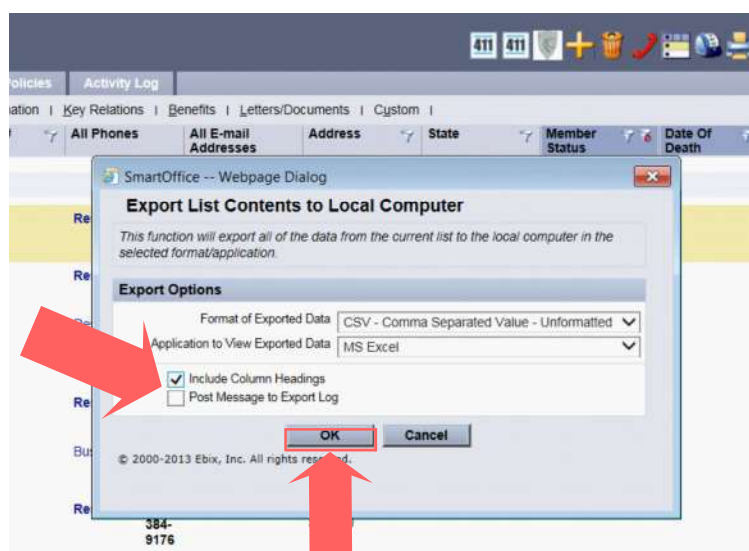It's time to SAVE your exported list! Select the format of Exported Data as:

CSV-Comma Separated Value-Unformatted

STEP 9:

Be sure to select:

☑ **Include Column Headings**

Now, CLICK **- OK**

STEP 10:

a. Your download will open as an Excel file and will need to be saved. Create a folder on your computer and and save the spreadsheet file in it > **SAVE AS: Your First & Last Name - Master List** *(ex. John Smith Master List)*

b. **Create a ZIP File:** Right-click on the folder. Select Send to > Compressed (zipped) folder (Windows) or Compress (Mac). This will create a .zip file containing your folder.

c. **Open a New Email in Outlook:** Start a new message as you normally would. Add the recipient's email address **smartcalls323@gmail.com** and subject line: "Your name and master list".

d. **Attach the ZIP File:** Click **Attach File** and select the .zip file you just created.

e. EMAIL the .zip file with a **list of your council numbers** to **smartcalls323@gmail.com**

f. **You will receive a confirmation email with the next steps once the team has opened the email and reviewed it for accuracy.**