

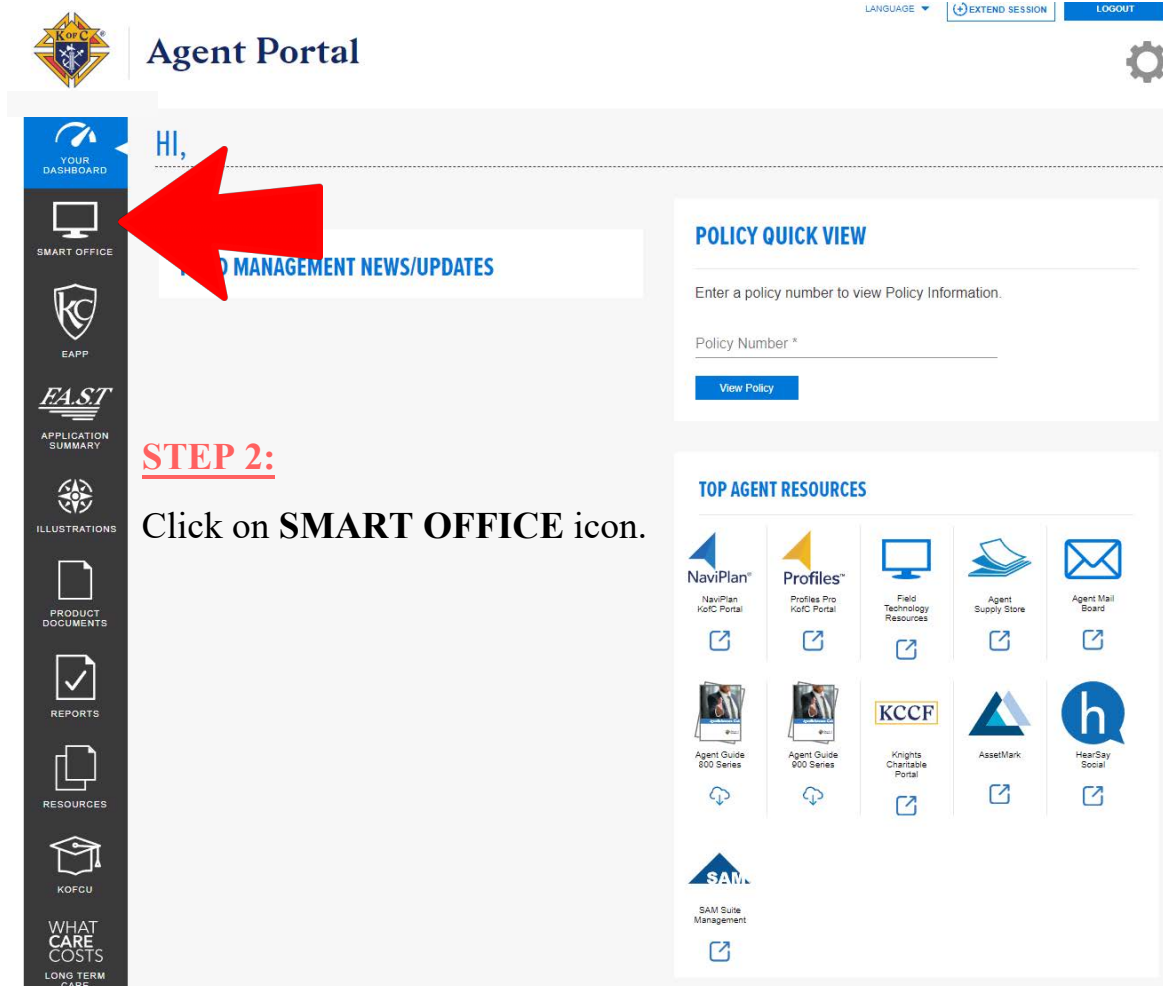
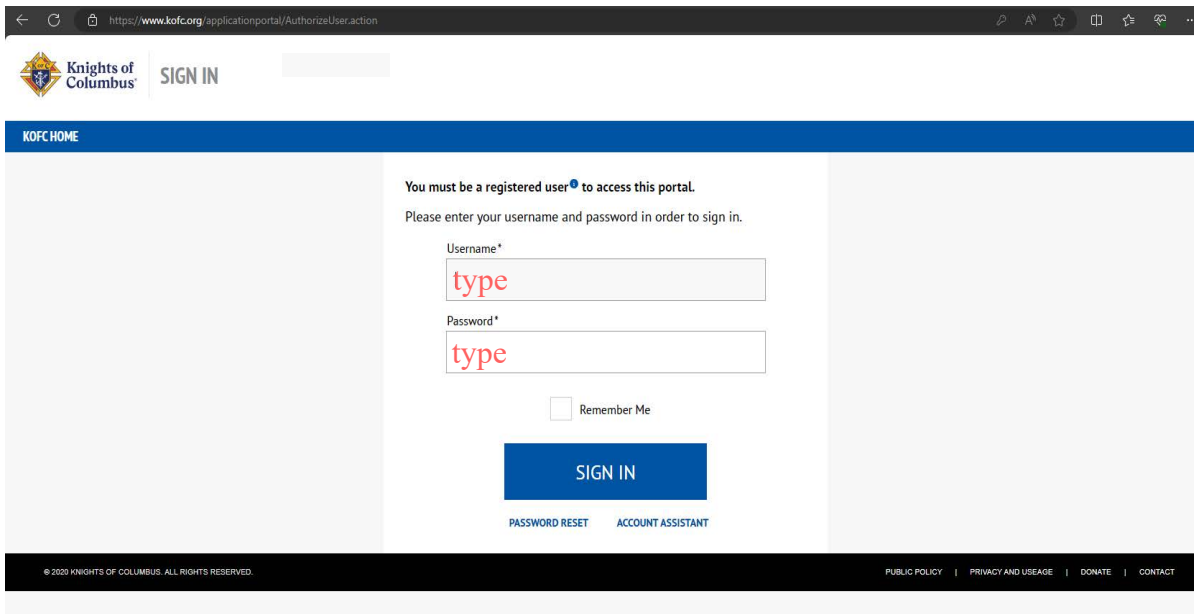
Instructions
for
Smart Office
Member Extraction
to use with



STEP 1:

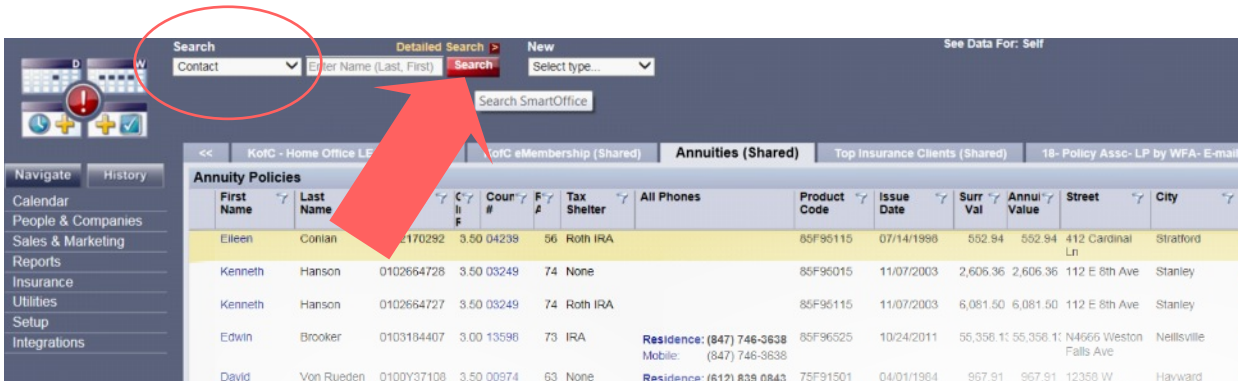
Log in to your agent portal by typing your username and password.

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”

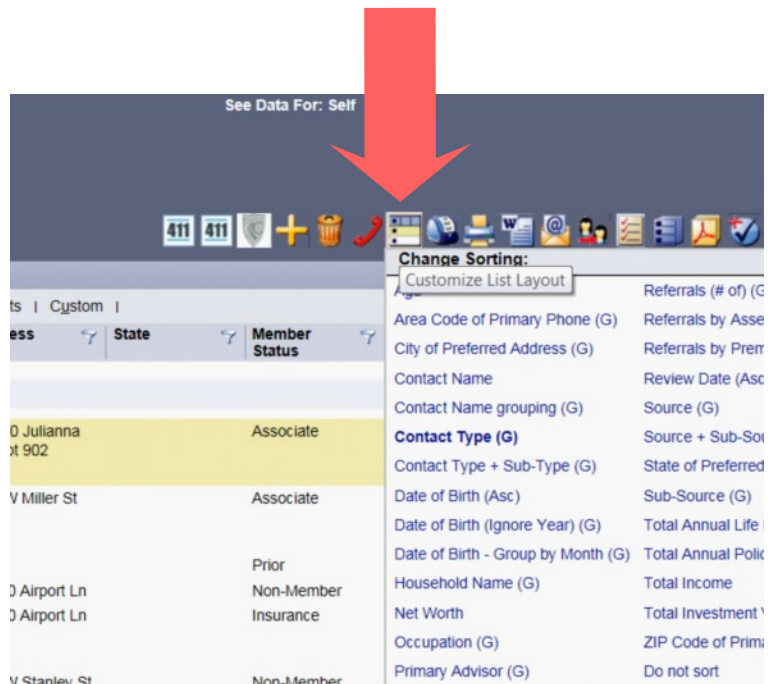
STEP 4:

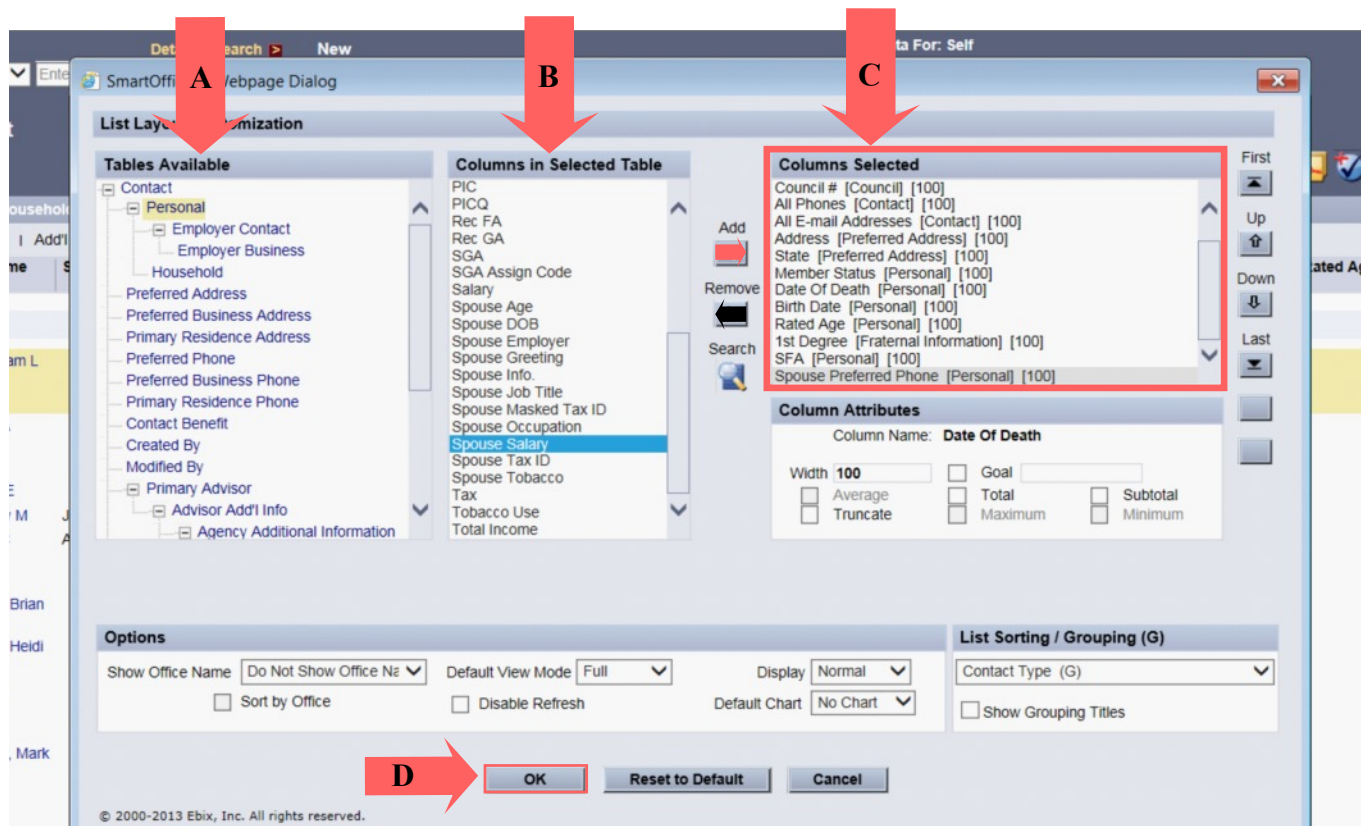
On the top right options, click:

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.

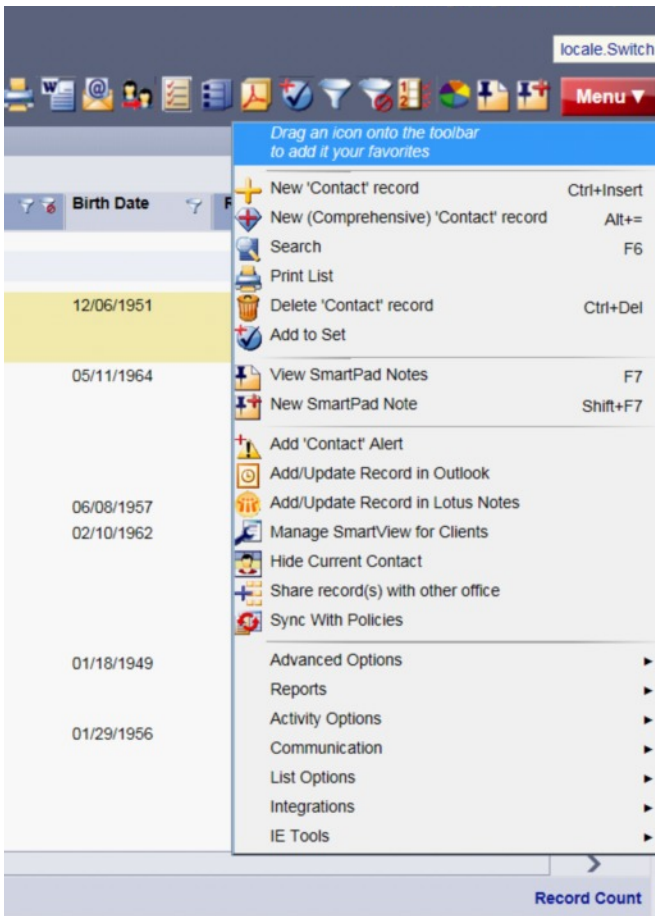
READ CAREFULLY:

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	1 st Degree
Council	Council #

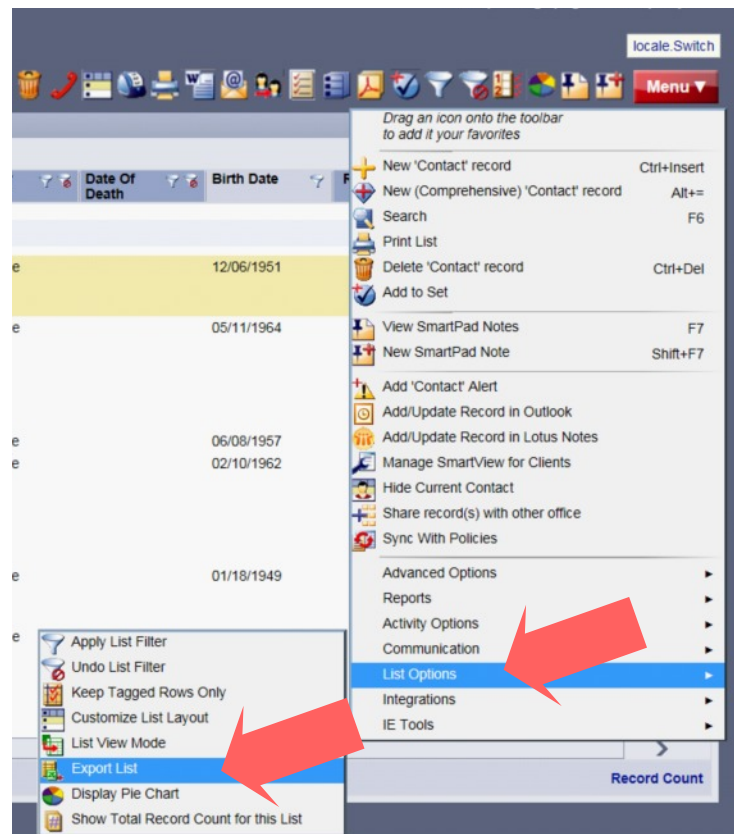


STEP 6:

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

STEP 7:

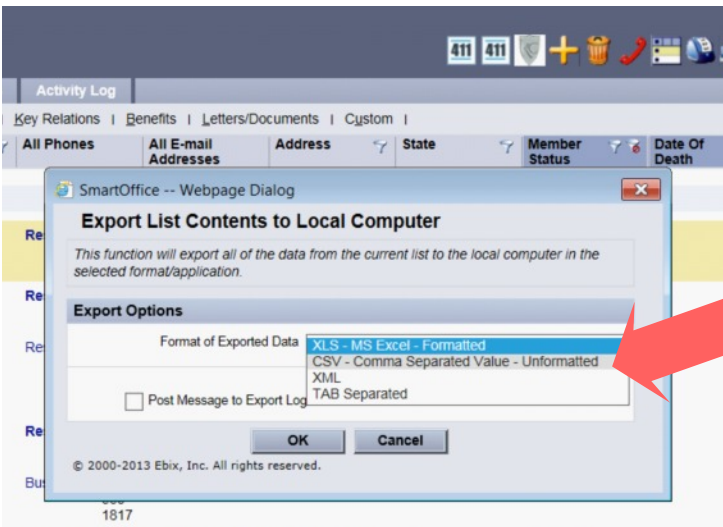
Scroll down to “LIST OPTIONS” and then select “EXPORT LIST” from the left box.



STEP 8:

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

CSV-Comma Separated Value-Unformatted

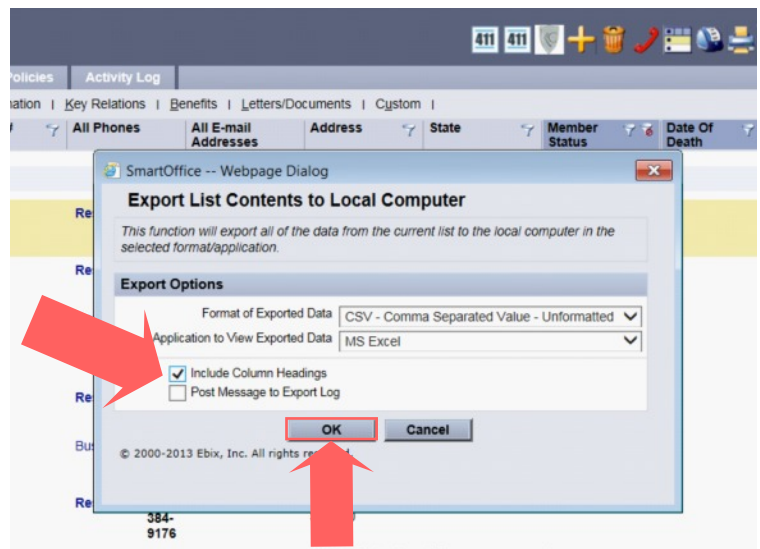


STEP 9:

Be sure to select:

Include Column Headings

Now, CLICK - **OK**



STEP 10:

You are ready to save your file > **SAVE AS: Your 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 smartcalls323@gmail.com

