# Instructions for Smart Office Member Extraction to use with



Updated 12/13/2023



Please enter your usern Fields marked with an a This section requires us	ame and password and click on the "Login" button to log in sterisk (*) are required. er registration.
Username: *	type
Password: *	type
	Remember my username
	Change password

# **STEP 1:**

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

Click on LOGIN



#### **STEP 2:**

Click on AGENT PORTAL icon.





	Search Contact	Erter Name	Detailed S (Last, First)	earch ≥ N Search	ew Select type	<b>~</b>		SI	ee Data Fo	r: Self		
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Integrations	Edwin	Brooker	0103184407	3.00 13598	73 IRA	Residence: (847) 746-3638 Mobile: (847) 746-3638	85F96525	10/24/2011	55,358.13	55,358.13	N4666 Weston Falls Ave	Nellisville
	David	Von Rueden	0100Y37108	3.50 00974	63 None	Residence: (612) 839 0843	75F91501	04/01/1984	967.91	967.91	12358 W	Havward

#### **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.

	See Data For: Self		
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0 Julianna ot 902	Associate	Contact Type (G) Contact Type + Sub-Type (G)	Source + Sub-Sou State of Preferred
V Miller St	Associate	Date of Birth (Asc) Date of Birth (Ignore Year) (G)	Sub-Source (G) Total Annual Life
	Prior	Date of Birth - Group by Month (G) Household Name (G)	Total Annual Polic Total Income
) Airport Ln ) Airport Ln	Insurance	Net Worth	Total Investment
V Stanley St	Non-Member	Occupation (G) Primary Advisor (G)	ZIP Code of Prima Do not sort





#### **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



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
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	Search	F6
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12/06/1951	Delete 'Contact' record	Ctrl+Del
	Mdd to Set	
05/11/1964	View SmartPad Notes	F7
	I New SmartPad Note	Shift+F7
	+ Add 'Contact' Alert	
	Add/Update Record in Outlook	
06/08/1957	Add/Update Record in Lotus Notes	
02/10/1962	Manage SmartView for Clients	
	Hide Current Contact	
	Share record(s) with other office	
	Sync With Policies	
01/18/1949	Advanced Options	
	Reports	
04/00/4050	Activity Options	
01/29/1956	Communication	
	List Options	
	Integrations	
	IE Tools	

#### <u>STEP 7:</u>

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

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			Drag an icon onto the toolbar to add it your favorites	
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e	12/06/1951		Delete 'Contact' record Add to Set	Ctrl+Del
e	05/11/1964	¥ ¥*	View SmartPad Notes New SmartPad Note Add 'Contact' Alert	F7 Shift+F7
e e	06/08/1957 02/10/1962		Add/Update Record In Outlook Add/Update Record in Lotus Notes Manage SmartView for Clients	
		+	Share record(s) with other office Sync With Policies	
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# **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**

## <u>STEP 10:</u>

Be sure to select:

# ☑ Include Column Headings

Now, CLICK - OK



#### **STEP 11:**

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** 

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