

# SmartOffice EXCHANGE SYNC

Automatically sync data and post e-mails to SmartOffice from any device using the power of the cloud and Microsoft® Exchange.

Today's advisor demands the flexibility to choose how and where to do business. Whether you're on a desktop PC at the office or a smartphone or tablet out in the field, you want all of your devices to work seamlessly with each other—and with your CRM. SmartOffice CRM makes that possible. Through Ebix's partnership with Financial Computer, SmartOffice customers have access to a powerful tool that automatically syncs calendar activities and contacts.

## [A Direct Link to Your BGAs](#)

Exchange Sync will transform the way you work. Here's a breakdown of the benefits you'll enjoy when you integrate SmartOffice with Exchange.

Key Benefits		
<b>Sync your contacts and calendar across all of your devices</b>	No matter how you update your contacts, appointments and tasks—using SmartOffice, Outlook or your mobile device's contact or calendar app—your changes are reflected everywhere. Exchange Sync creates a direct link between Exchange, SmartOffice and your devices.	
<b>Maintain an e-mail trail</b>	Don't waste time searching Outlook or your phone's e-mail app for past e-mail conversations. E-mail posting automatically copies your sent e-mails to your SmartOffice client records, and it works whether you send messages using your mobile device or Outlook on your PC. To see a client's e-mail correspondence history, simply open that client's SmartPad.	
<b>Use the devices you want to use</b>	Exchange Sync works with any Exchange-compatible device or application. That means you can seamlessly use a combination of devices—say, a PC running Outlook, an Android phone and an Apple iPad—to get the job done.	

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## Sync in Action

Here's a quick visual tour of the Exchange Sync experience.

The screenshot displays the SmartOffice Anywhere interface. On the left is a navigation sidebar with options like Dashboard, Calendar, Contacts, Set, Advisors/Agencies, Policies, Presales, Investment, Opportunities, and Dynamic Reports. The main area shows a contact record for 'M.D. Joseph Ackerman' with personal information, a photo, and contact details. A central pane shows a list of contacts with 'Ackerman' selected. On the right, a detailed view of the contact shows phone numbers, email addresses, and company information. A smartphone overlay on the right shows the same contact record on a mobile device. A blue callout box points to the contact list with the text: 'A contact record is synchronized across a smartphone, SmartOffice and Outlook on Windows. Contact and activity updates made on one device are automatically pushed to all other devices.'

The screenshot shows the SmartPad interface displaying an email message. The email is dated '23 Jul '15' and is addressed to 'Dear Joe,'. The body of the email reads: 'Thanks for your e-mail. I'd be happy to meet with you to answer your questions about the allocation of assets in your portfolio. Is there a day and time this week that works best for you?'. The signature is 'Regards, Phil Anderson'. A smartphone overlay on the right shows the same email being composed, with the recipient 'Joseph Ackerman' and the subject 'Re: Asset allocation question'. A blue callout box points to the smartphone with the text: 'An e-mail message sent from a smartphone is automatically posted to the contact's SmartPad in SmartOffice. E-mail posting creates a record of past correspondence with your clients that you can refer to anytime.'

## Get Started Today

Visit Financial Computer's Exchange Sync for SmartOffice portal at [exchangesync.fcasp.com](http://exchangesync.fcasp.com). Use promo code **EbixN** to add this service to your SmartOffice account.

Financial Computer specializes in delivering IT solutions to the financial services industry, with an emphasis on cybersecurity, regulatory compliance and intelligent integration. For more information, visit [www.financialcomputer.com](http://www.financialcomputer.com) or call 888-434-6443.