

SmartOffice

30/60/90-Day Checklist

Basic SmartOffice Knowledge for New Users

30-Day Checklist	60-Day Checklist	90-Day Checklist
<ul style="list-style-type: none"> <input type="checkbox"/> Basic Navigation <ul style="list-style-type: none"> • Profile Setup • Search & Retrieve • Entering Contacts/Businesses • Using SmartPad • Create Sets • Create Households • Create Key Relations <input type="checkbox"/> Calendar <ul style="list-style-type: none"> • Profile Setup • Create Tasks & Activities • Mark Entries Done • Add Documents / Notes <input type="checkbox"/> Reporting/Dashboards <ul style="list-style-type: none"> • Create Dynamic Report • Create Dashboard • Work Data on Dashboard 	<ul style="list-style-type: none"> <input type="checkbox"/> Data <ul style="list-style-type: none"> • Create Custom Choices • Create Custom Fields <input type="checkbox"/> Sets <ul style="list-style-type: none"> • Work with the Set <input type="checkbox"/> Households <ul style="list-style-type: none"> • Add New Members • Review/Edit Data • Create Notes <input type="checkbox"/> Reporting / Dashboards <ul style="list-style-type: none"> • Create Charts / Goals • Setup Auto Email • Edit/Copy Reports 	<ul style="list-style-type: none"> <input type="checkbox"/> Outlook Plug-In <ul style="list-style-type: none"> • Open • Create Calendar Entry <input type="checkbox"/> Calendar <ul style="list-style-type: none"> • Mass Task Creation • Auto Activity Outcome <input type="checkbox"/> SmartPad <ul style="list-style-type: none"> • Create Mass Notes • Sort • Keywords <p>Create a "goal" for the remainder of year and implement within SmartOffice</p> <p>Examples:</p> <ul style="list-style-type: none"> • Birthday Lists on Dashboard • Segment and List Top Contacts • Contact a Set (Reason for the Set) • Execute a Marketing Idea

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