SmartOffice
Docupace Integration

Advanced form-filling, document management, and compliance review

SmartOffice CRM centralizes your firm's knowledge about clients, so it makes sense to use that data to supercharge your daily form processing and document management tasks. SmartOffice's integration with Docupace helps you do just that.

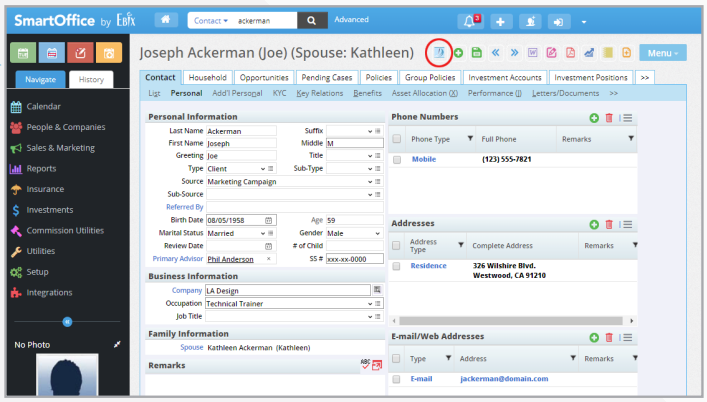
- **Enhanced Form-Filling:** Export contact data from SmartOffice into Docupace Starting Point to pre-fill new-account forms. Access completed forms using direct links to Docupace in the SmartOffice contact record.
- **Direct Access to Client Folders:** Get one-click, single sign-on (SSO) access to Docupace client folders from SmartOffice contact, investment account and policy records—no need to log in to Docupace.
- **Easy Document Transfer and Compliance*:** Send notes, letters and documents from SmartOffice to Docupace with just a few clicks. Save time compiling client notes and documents for compliance review.
- **No Installation Required:** Enjoy a completely cloud-based workflow with no extra software to install and maintain on your computer.

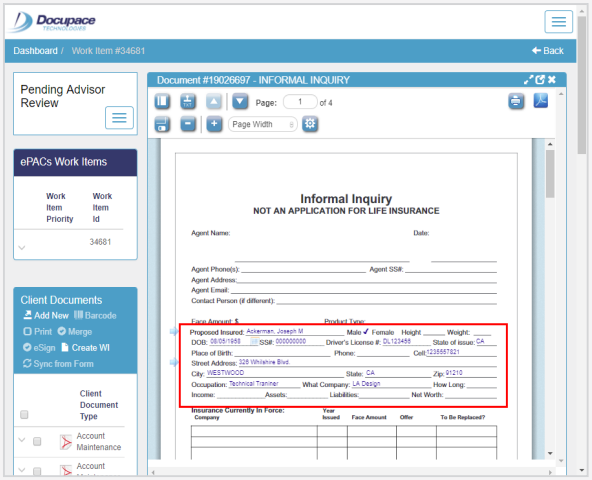
* Available through select broker-dealers.

Take a Look

Form Filling (Docupace Starting Point)

1 From a SmartOffice contact record, clicking a button takes you directly to Docupace Starting Point.



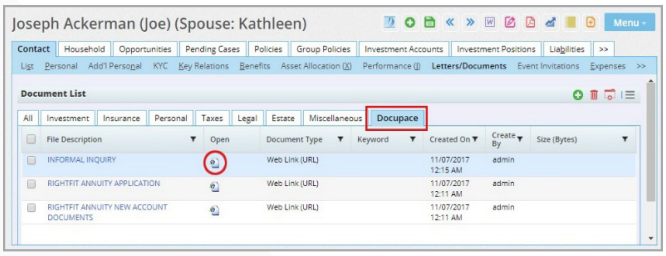


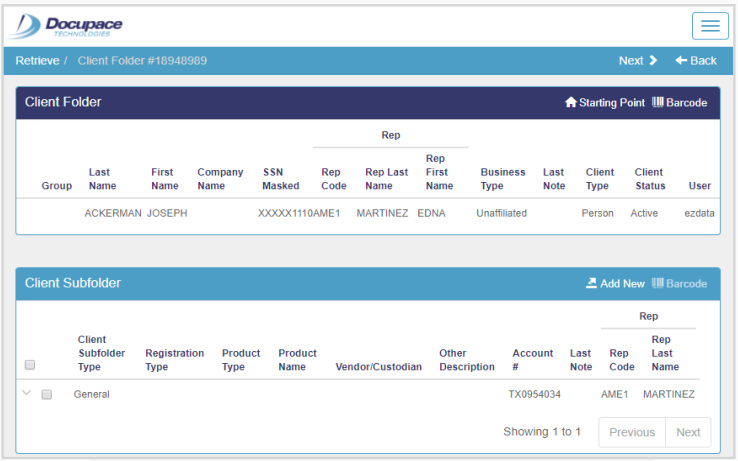
2 In Docupace, forms are pre-filled with data from the SmartOffice contact. Completed forms appear as links in SmartOffice; clicking them opens the forms in Docupace.

Ebix

Client Folder Access

1 Click the Docupace button in the client's SmartOffice contact record to get fast access to a client's folder in Docupace.

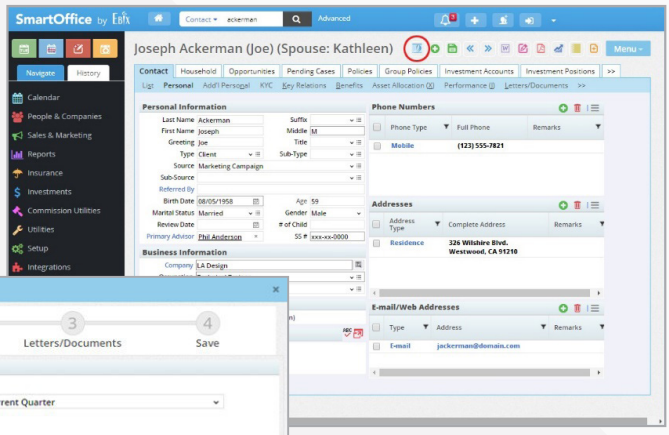


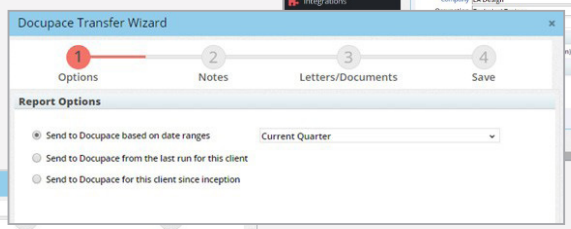


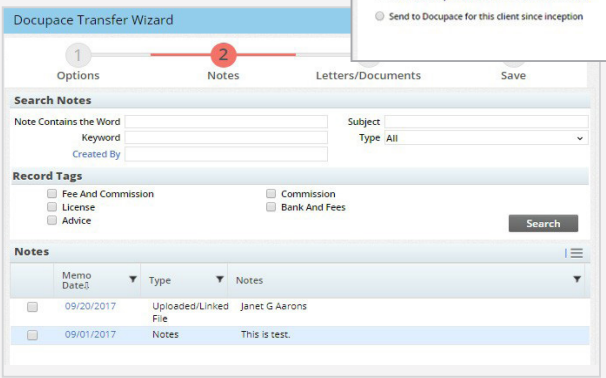
2 If a folder exists for that client in Docupace, it opens directly—no login required. If the folder doesn't exist, SmartOffice creates it automatically.

Note and Document Transfer

1 Click a button in a SmartOffice contact record to open the Docupace Transfer Wizard. Then choose whether you want to select notes and documents based on date range, since the last time the wizard was run, or since inception.







2 Let the wizard guide you through the process of selecting the content you want to send to the client's Docupace folder.

251 S. Lake Ave., Suite 200, Pasadena , CA 91101
P: 800-777-9188 | E: crmsales@ebix.com | W: **www.ebixcrm.com**