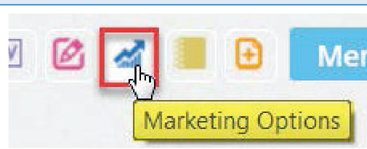
SmartOffice®

Onboarding Checklist

What?	Action
Access	From GOL Home>SmartOffice>Login OR GOL QuickStart>SmartOffice
	Allow the page to load – DO NOT click on Signin at the top right
Search for Contact	Last Name (comma) First Name or (comma) First Name (few letters will be enough of each)
Add a Contact/Lead	ALWAYS search for the name first to make sure he/she is not already in SmartOffice
	Click on + at the top right…New…Contact (or Business)
	ALWAYS use LEGAL First Name, Last Name and if you have it, add DOB (for HO data feed)
	No combo names! No Seth & Beth, Jerry & Sherrie…add 1st spouse, email, mobile #
	Click Save & Close…then click on "Add Spouse/Partner" to add spouse's email, mobile, etc.
	SmartOffice creates relationship, adds a Household, can add kids as Key Relations (tab)
Contact "Types"	ONLY use…Client, Deceased or COI, Cultivator, Lead, Prospect, Not Interested
Referrals	"Referred By" field creates relationship between the two contacts…not a static field
	If you meet a COI and get a referral, add the COI 1st, Referral 2nd.
	SmartOffice tracks the referral tree ("Amway" hierarchy) and has Referral Tree Visualizer
Referred To?	Attorney, CPA, Other Adviser must have a Contact record in SmartOffice.
	On Key Relations tab, add Adviser to the contact as Attorney, Accountant (Professional)
Calendar	Calendar Shortcuts to Agenda, Week, New Task, New Activity
	Your Outlook calendar has been synced (one-way) to SmartOffice
	When you add a new appointment in OWA, ALWAYS invite the external contact 1st.
	Sync runs about every 10 minutes…so not instantaneous.
	When the appointment syncs to SmartOffice, activity will be linked based on email match.

	A two-way sync can be requested by emailing smartoffice@glic.com
	Why would I want a 2-way sync? Because marking activities “Done” leads to next activity
Email Posting	Look under “More” in left pane of OWA for new folder, “SO To Post” (Add to Favorites)
	Email posting runs about every 10 minutes. If emails are in folder, not in SO and vice-versa
	There are 2 ways to post e-mails.
	1. For outgoing emails, add Bcc: GSOP (email will post to contact’s record if email match)
	(In OWA, go to Settings>Mail>Message Layout (bottom left) and “Always show Bcc:”)
	2. For other emails, add to SO To Post folder in OWA - Hold Ctrl + click & drag to folder
	“Lost” Emails (No email match) go to YOUR SmartPad (Copy to contact, then Archive)
Contact Sync	Available upon request to sync SO Contacts to Outlook to Phone (Guardian managed)
SmartPad	Everything in SmartOffice is logged automatically to SmartPad – NO DELETIONS (Archive)
DOL Activity Capture	SmartPad notes, Activity Outcomes (date/time stamped) Notice “Advice” checkbox
LBS Integration	See SmartTip for details, but sync can go either way. On demand, 1 client/HH at a time
NetX360 Integration	20+ fields can be pulled from SmartOffice to populate new account forms in NetX360
Investments	New investment feed is already in SmartOffice – $5 Add-on Module available in Storefront
Policies	HO data feed for Guardian Life, DI and Berkshire DI – few days after you’re paid.
	Existing client records have already been merged with SalesForce contacts (emails, phones)
MS Word & Excel	Export lists to Excel, future opportunities to use SmartOffice for correspondence
Client Manager	Go to Menu>Integrations>Client Manager (click and drag icon to tool bar)
	From a client’s record, Client Manager will launch, run search and land on that client
Albridge Wealth	Similar integration with AWR, runs search and land on that client (drag icon to toolbar)
MarketEDGE360	“Pull Set from SmartOffice” instead of uploading a list. Marketing pieces, subscriptions
	Dashboard for “MarketEDGE360 Activity” can be added to Home page–ME360 write-backs
Opportunities	PWM Pipeline
	Click on  and type PWM to add to Pipeline
	Manage Opportunities and Leads from Home 
SmartOffice Anywhere	In App Store, search for GLIC SOA, “Get” and “Install” On Android, use Chrome browser and go to *SOA.glic.com* (Bookmark)
	Login with your GOL ID and password
	Entire DB in your hand, phone #’s (dial), calendar, policies, SmartPad (dictate notes)