

Dyane Ware

From: Dyane Ware [Dyane@ASGLife.com]
Sent: Friday, April 01, 2011 10:15 AM
To: 'all@asglife.com'
Cc: 'smartoffice@asglife.com'
Subject: Group Cases

Good Morning All,

Just recently received a large number of cases under one corporation.

I entered the Corporation as a Business and I entered the employees under the employee census tab.

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https://mysmartoffice4.ez-data.com/index.htm?trustedWindow=1

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ASG AGENT SUPPORT GROUP

Search Business Marcum, LLP Search New Select type...

Marcum, LLP California

Business Household Pending Cases Policies Presale Activity/Proposals

List Detail (P) Add/Detail (N) Key Relations **Employee Census** Benefits Letters/Document

Employee Census List

<input type="checkbox"/> Retirement Date	<input checked="" type="checkbox"/> Contact Name
<input type="checkbox"/> <None>	Babek, Robert
<input type="checkbox"/> <None>	Bailey, Marjorie

Records Shown: 2 Total Records: 2

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Photo Done

SmartOffice - Dya... Documents Inbox - Microsoft... Group Cases

Be sure to select client under- type after entering each employee.

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Search Business Marcum, LLP Search New Select type...

Robert Babek

Contact Household Pending Cases Policies Pre-sale Activity/Proposals Acti
 List Personal Add'l Personal Key Relations Benefits Letters/Documents Custom

Personal Information

Last Name: **Babek** Suffix:
 First Name: **Robert** Middle:
 Greeting: **Robert** Title: **Mr.**
 Type: **Client** Sub-Type:
 Source:
 Sub-Source:
 Referred By:
 Birth Date: **01/20/1959** Age: **52**
 Marital Status: Gender: **Male**
 Review Date: # of Child:
 Primary Advisor: **Lawrence Levine** SS #:

Phone Numbers

Phone Type Full P
 Business (310)

Addresses

Address Complete Ad
 Business 2049 Century Suite 400 Los Angeles

Business Information

Company: **Marcum, LLP California**
 Occupation:
 Job Title:

Family Information

Add Spouse/Partner

Photo

Done

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After reviewing and trying to figure out where did the information go that I entered yesterday with Marion we discovered the following:

Please note that when entering a business and then employees under that business:

The Business will only come up under the tab-Business when you are trying to search for it. DO NOT USE—CONTACT/BUSINESS to search for it.

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Search Business Marcum, LLP Search

Detailed Search > New Select type...

Click Search for more results...

Marcum, LLP

Marcum, LLP California

Robert Babek

Contact
 Household
 Pending Cases
 Policies
 Previous Activity/Proposals
 Archived

List | Personal | Add'l Personal | Key Relations | Benefits | Letters/Documents | Custom |

Personal Information

Last Name	Babek	Suffix	
First Name	Robert	Middle	
Greeting	Robert	Title	Mr.
Type	Client	Sub-Type	
Source			
Sub-Source			
Referred By			
Birth Date	01/20/1959	Age	52
Marital Status		Gender	Male
Review Date		# of Child	
Primary Advisor	Lawrence Levine	SS #	

Phone Numbers

<input type="checkbox"/> Phone Type	<input checked="" type="checkbox"/> Full P
<input type="checkbox"/> Business	(310)

Addresses

<input type="checkbox"/> Address Type	<input checked="" type="checkbox"/> Complete Ad
<input type="checkbox"/> Business	2049 Century Suite 400 Los Angeles

Business Information

Company	Marcum, LLP California
Occupation	
Job Title	

Family Information

Add Spouse/Partner

E-mail/Web Addresses

Address

Remarks

Photo

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When searching for an employee under that business, they will eventually come up under the contact tab.

First Smart office will state that it cannot find that employee, eventually a pop up window will appear and state: below are records with a similar name found in other areas of the system.

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https://mysmartoffice4.ez-data.com/index.htm?trustedWindow=1

File Edit View Favorites Tools Help

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Favorites Web Slice Gallery

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Search Contact Bailey, Mar Search Detailed Search

SmartSearch Results

Bailey, Mar not found. Below are records with a similar name of the system. If the links aren't clicking, the correct security rights.

Contact Name	Type
Bailey, Mariorie	Client

Contact List - Search Results for 'Bailey, Mar'

Contact	Household	Pending Cases	Policies
<p>List Personal Add'l Personal Key Relations Benefits</p> <p><input type="checkbox"/> Full Name <input type="checkbox"/> Type <input type="checkbox"/> Birth Date <input type="checkbox"/> Comp</p>			
<p>Records Shown: 0 Total Records: 0</p>			

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Done

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Thank you,

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