

SmartPDA

Providing direct mobile access to your SmartOffice data

Staying up to date with current client and account information is a key to driving productivity. But gaining real-time, direct access to this information, while at the same time eliminating redundant data entry, can be difficult when you're out of the office.

SmartPDA, an add-on module to SmartOffice®, provides fast, easy, and portable access to your SmartOffice data, enabling you to be more effective and productive anywhere, any time. Direct, real-time access allows you to add, change, and delete your vital SmartOffice records, including your calendar and client data. To make the process as easy as possible, SmartPDA leverages your existing browser, eliminating both the need for additional software and the traditional 'boot-and-sync' process required for accessing data on the road.

Client Data at Your Fingertips

Recommended for SmartOffice users with unlimited PDA data plans, SmartPDA works through your cellular-capable PDA phone's micro-browser without a separate application being added to the device. To give you the information you need most when you're on the road, SmartPDA provides a streamlined version of SmartOffice, providing fast access to the highest traffic areas within the system. Using a list of search options from your browser, you can create new contact, household, and activity records, and view and update many other record types — all directly from your PDA. This direct link to your real-time data reduces redundant data entry, ensures the accuracy of your calendar, and helps you service your clients better than ever.



DATASHEET

- Access SmartOffice directly from your PDA via the web
- Eliminate the time and hassle of data synchronization
- Drive greater productivity and eliminate redundant data entry
- Speed real-time communication between advisors and your staff

SmartPDA provides these valuable features:

- > **Online Access to SmartOffice** ensures data security and compliance by eliminating the need to store any client data directly on your PDA. If your PDA is lost or stolen, no client information is compromised.
- > **Micro-browser Support** eliminates the traditional boot-and-sync process, giving you the power of SmartOffice without the necessity of a separate application being added to your handheld device.
- > **Streamlined User Menu** gives you the ability to view and change your most important data whenever you're out of the office, including calendar, contacts, SmartPad, policies, account master, positions, opportunities, key relations, pending case status, and advisor and leads records.
- > **Real-time Data Sharing** eliminates redundant data entry and ensures that your office staff is immediately aware of any changes you make to your calendar or other critical client information.
- > **Remote Access** to immediate changes in your office calendar helps ensure you never miss another client appointment or waste valuable time traveling to a canceled meeting.

Note: E-Z Data is not liable for any connection charge, data fee, or any other charges related to accessing SmartPDA via broadband or other connection services. All fees relating to the connection and use of SmartPDA are the responsibility of the user. It is recommended that users have an unlimited data plan in order to use SmartPDA cost effectively.



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