

SmartOffice[®]

Version 7 User Guide

PRODUCT OVERVIEW



System Requirements

SmartOffice® v7, Revised: 02-02-10

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SmartOffice® v7 System Requirements

To ensure acceptable performance of SmartOffice, verify that the system requirements listed in this document are met or exceeded. These requirements are based on a combination of software design and field performance tests. Computers configured to exceed these minimum requirements may further enhance the overall performance of SmartOffice.

Microsoft® Windows®

Notes regarding support: Windows Terminal Services/Citrix environments are not supported. Mac environments, including Windows running on a Mac (e.g., Parallels, virtualization, dual boot, etc.), are not supported.

SmartOffice v7 requires one of the following versions of Windows with all updates installed ([download the latest Windows updates](#)):

- **Windows XP (with Service Pack 3)**
 - 32-bit versions only; 64-bit versions are not supported.
 - Windows XP Media Center Edition is not supported.
- **Windows Vista (with Service Pack 1)**
 - 32-bit versions are supported.
 - SmartOffice v7 has been tested and certified on 64-bit versions of Windows Vista Business and Windows Vista Home Premium using 32-bit versions of Microsoft Internet Explorer and Microsoft Office (64-bit versions of these programs are not supported).
- **Windows 7**
 - 32-bit and 64-bit versions are supported. Ebix CRM recommends using Windows 7 Home Premium or Windows 7 Professional with SmartOffice v7.

Memory (RAM)

- 1 GB for Windows XP
- 2 GB for Windows Vista
- 4 GB for Windows 7

Microsoft® Internet Explorer®

SmartOffice v7 supports the following versions of Internet Explorer (32-bit only; 64-bit versions are not supported). All updates must be installed ([download the latest Internet Explorer updates](#)).

Note regarding Internet Explorer support: The 64-bit version of Internet Explorer is not currently supported on any version of SmartOffice because of configuration issues with that version. SmartOffice's memory requirements are not high enough to make use of the 64-bit version. SmartOffice requires the 32-bit version of Internet Explorer to run properly.

- **Internet Explorer 7 or 8 (recommended)**

- Internet Explorer 7 or 8 is required for the following SmartLink integrations:
 - SmartLink for Laser App
 - SmartLink for Financial Profiles+
 - SmartLink for Quik! Forms
 - SmartLink for Labels (DYMO v7.8; v8.2 is not supported at this time)
 - SmartLink for Jefferson Pilot
 - SmartLink for Licensing and Appointments
 - SmartLink for Mass Mutual PARR
 - SmartLink for DAZL
 - SmartLink for DST
 - SmartLink for Lincoln Investment Planning
 - SmartLink for LPL
 - SmartLink for National Financial/Fidelity
 - SmartLink for Pershing
 - SmartLink for Raymond James
 - SmartLink for Resources Trust IMS
 - SmartLink for Rydex
 - SmartLink for Stern Agee
 - SmartLink for TD Ameritrade
 - SmartLink for The Vanguard Group
 - SmartLink for Walnut Street Securities

- **Internet Explorer 6**

- Internet Explorer 6 is compatible with Microsoft® Word®, Outlook® and Excel® integrations, as well as PDF export.

Note: Because of minor graphical issues that occur when using Internet Explorer 6 with SmartOffice v7, Ebix CRM does not recommend Internet Explorer 6.

Microsoft® Office®

SmartOffice v7 integrates with the following versions of Microsoft Office programs (32-bit only; 64-bit versions are not supported). All updates must be installed ([download the latest Office updates](#)).

- Word 2007 or 2003 (required for composing letters in Word)
- Excel 2007 or 2003 (required for exporting and printing the Excel files produced by SmartOffice)
- Outlook 2007 or 2003 (required for Outlook e-mail posting and calendar/contact synchronization)

Note: While SmartOffice v5 worked with versions of Microsoft Office prior to Office 2003, due to major changes in Office 2007, E-Z Data is unable to support integration between SmartOffice v7 and versions of Office prior to Office 2003. Microsoft no longer supports Office 2000.

SmartOffice v7 has not been tested or certified for use with the following Office editions:

- Microsoft Office Home and Student 2007
- Microsoft Office Student and Teacher Edition 2003

Lotus® Notes®

SmartOffice v7 integrates with the following versions of Lotus Notes:

- Lotus Notes 6.5.x, 7.0.2 or 8 (required for Lotus Notes e-mail posting)

Note: SmartOffice v7 requires additional Lotus Notes Template changes for e-mail posting to work correctly. Please review the [Lotus Notes Template Setup Guide](#) and consult your Lotus Notes administrator.

Adobe® Reader®

Adobe Reader 6, 7, 8 or 9 is required for viewing and printing PDF files produced by SmartOffice. Adobe Reader 7, 8 or 9 is recommended ([download Adobe Reader](#)).

Contact Information

For assistance, contact Ebix CRM Technical Support at (626) 585-3515 or support@ezdata.com.