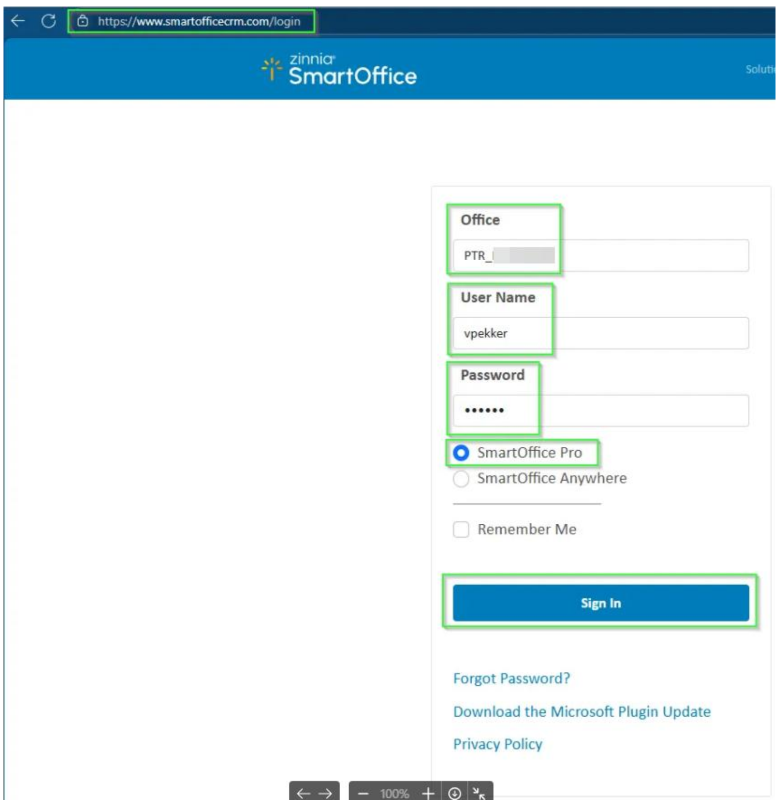
Smart Office CRM Setup in Forms Logic

OVERVIEW

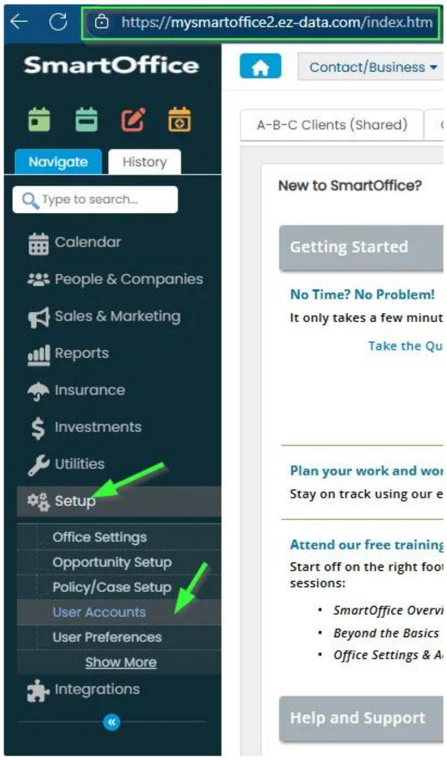
This guide covers how to set up the Smart Office CRM integration in Forms Logic. Before beginning, the Smart Office user or admin must enable the Forms Logic integration within Smart Office for the user.

ADMINS – ENABLE THE INTEGRATION IN SMART OFFICE

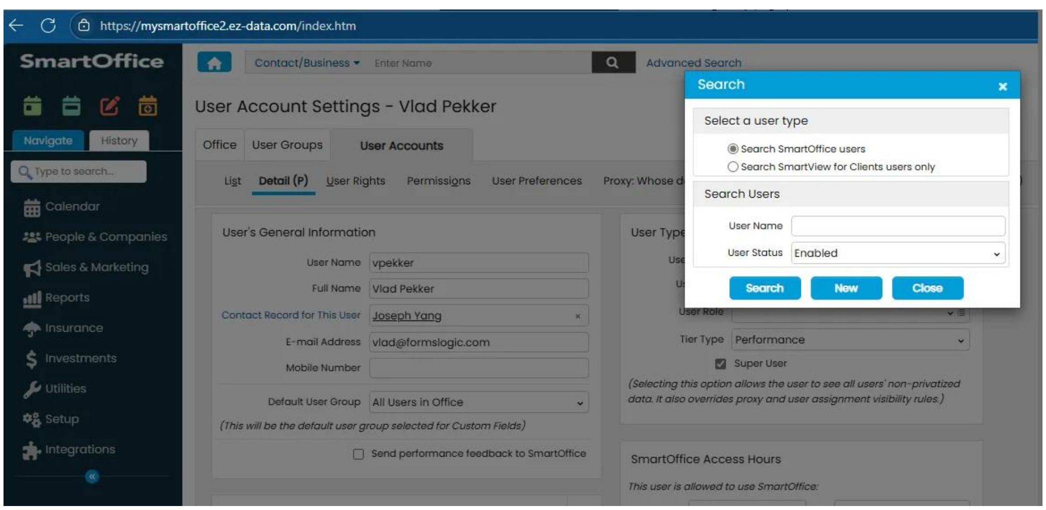
1. Log in to Smart Office. On the login screen, **capture the highlighted data** for the user you are setting up.



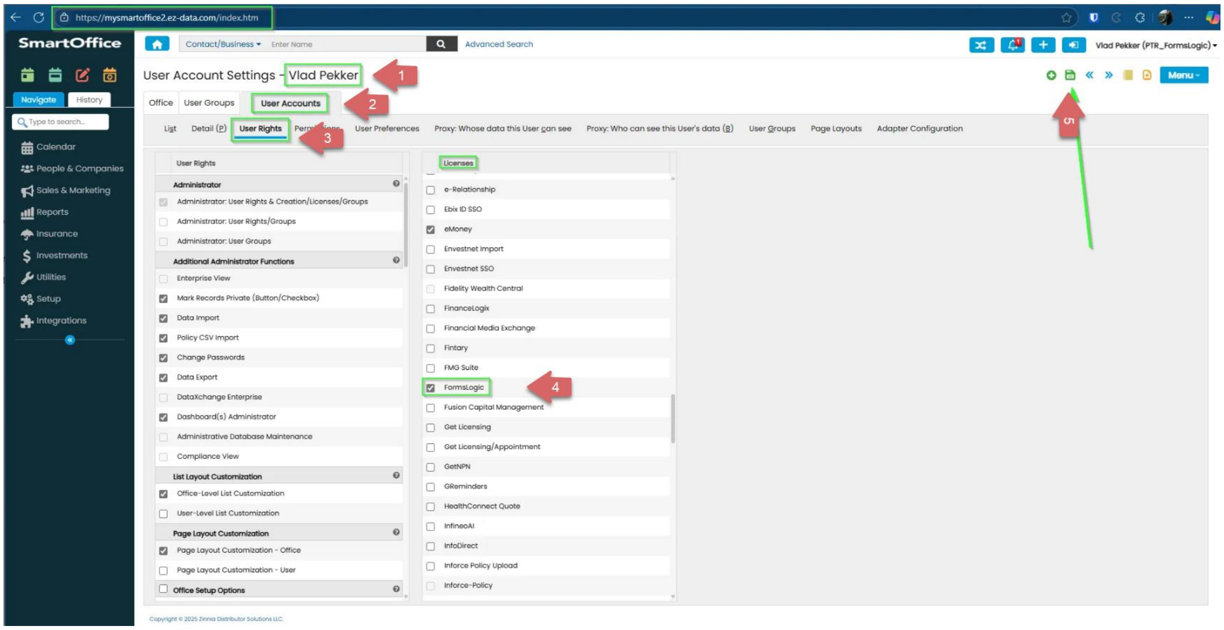
2. Once logged in, select **Setup** and User **Accounts** from the side bar.



3. Search for the User needing the integration and navigate into their account settings.

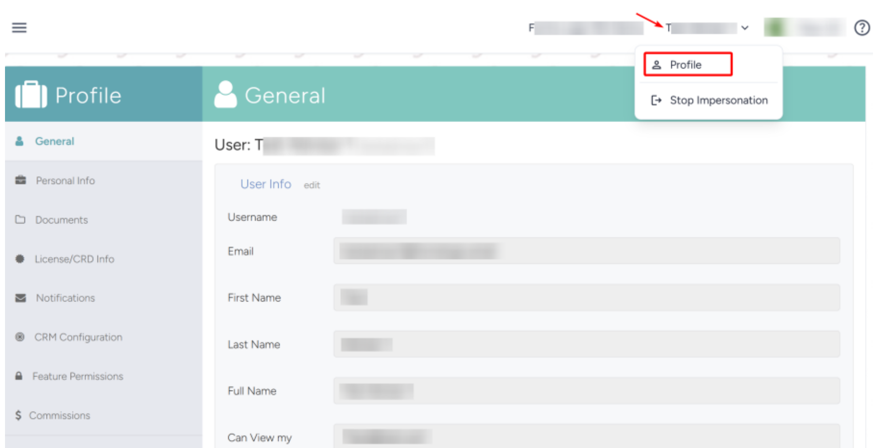


4. To enable the user's Forms Logic integration, follow these steps.
   1. Verify the User is correct.
   2. Click on the **User Account** Tab.
   3. Click on **User Rights**.
   4. **Check the box** for Forms Logic.
   5. Click the **Save icon** at the top of the page.

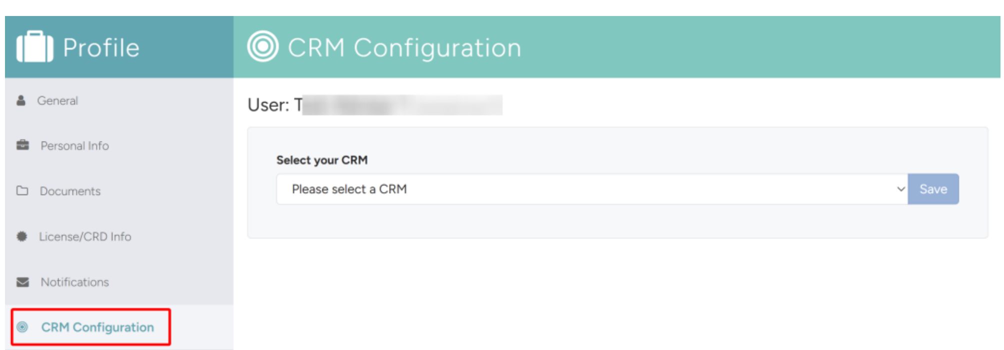


CONFIGURE IN FORMS LOGIC

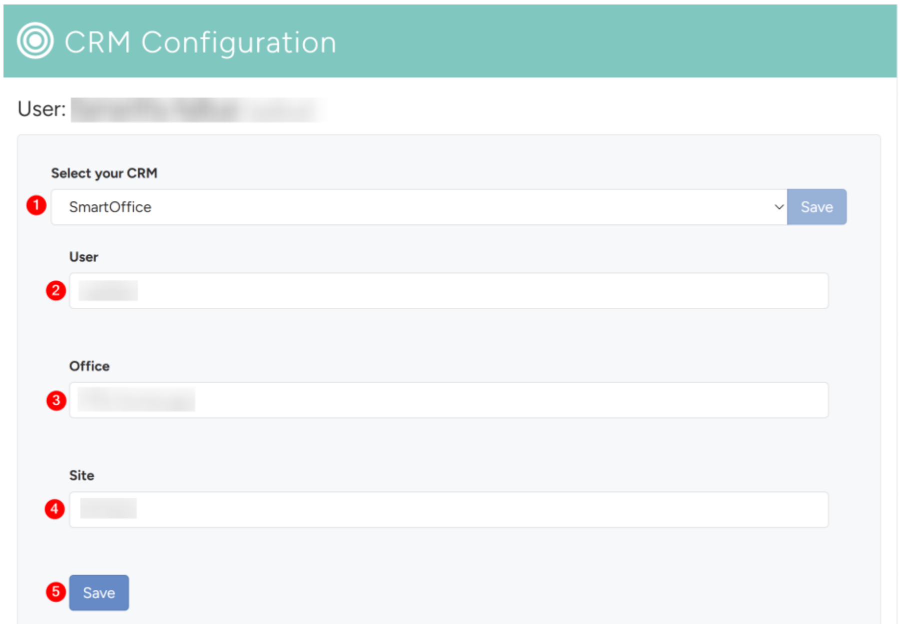
1. Click your user name in the upper right and click the **Profile** button from the dropdown. The Profile will load as shown below.



2. Navigate into the **CRM Configuration tab**.



3. To Configure SmartOffice, follow these steps:
    1. Select SmartOffice as the CRM and click Save.
    2. Enter the **Username** from Smart Office.
    3. Enter the **Office**.
    4. Enter the **Site configuration**.
    5. Click **Save**.



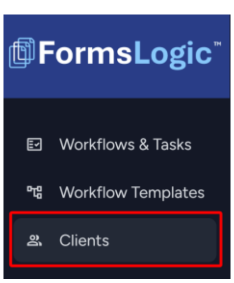
> The Site Configuration value comes from the Smart Office URL while the user is signed in. For example, https://mysmartoffice2.ez-data.com becomes MYSO2. Other examples: MYSO, MYSO3, MYSO4, MYSO6, PPLUS, JHFN, PENN.

4. Once you have clicked Save, the connection will test and provide a confirmation message if the connection was successful or failed.

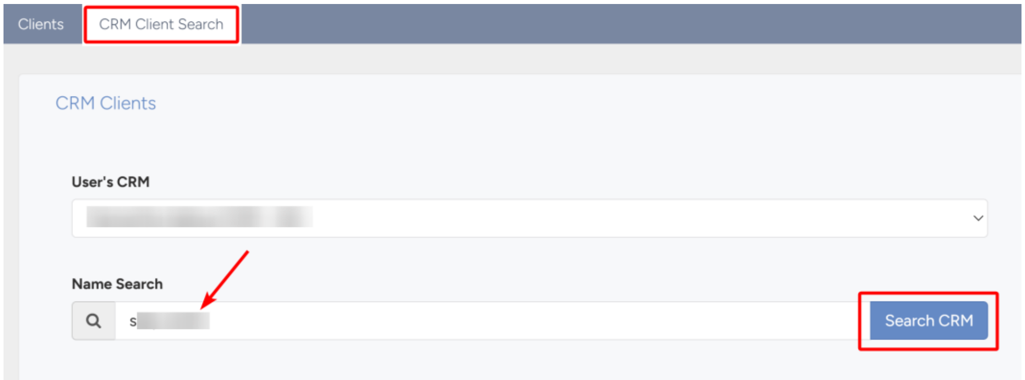
TEST THE INTEGRATION

To test the Smart Office integration, follow these steps.

1. From the side navigation menu, navigate to **Clients**.



2. Click the **CRM Client Search** tab. In this tab, you can see the User's CRM is set up correctly by the (CRM – OK) under User's CRM. Enter a client's name and click **Search CRM**.



3. You will receive a success message and the name of the client will be listed. Click the **Create New Form Workflow** link next to the selected CRM client to create a workflow using the CRM integration.