

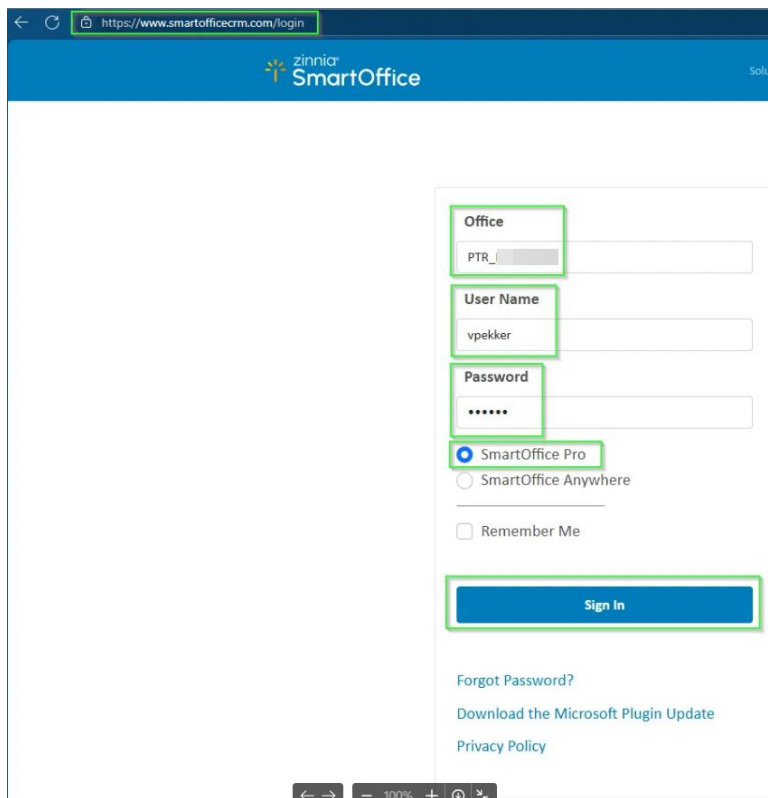
Smart Office CRM Setup in Forms Logic

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.

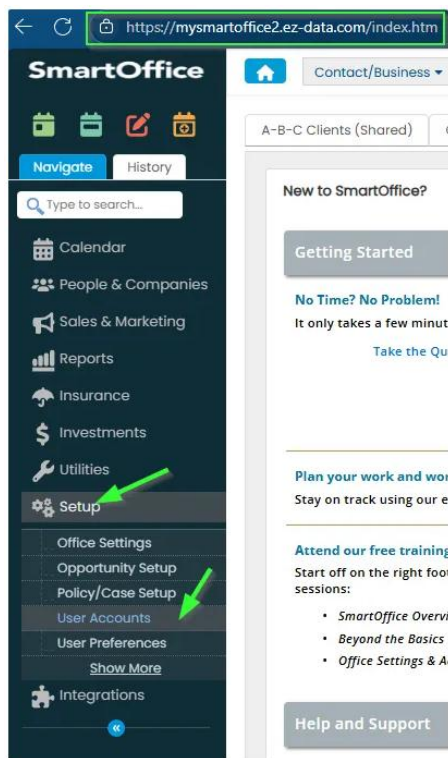


The screenshot shows the Smart Office login page in a web browser. The address bar displays <https://www.smartofficecrm.com/login>. The page header includes the Zinnia SmartOffice logo. The login form contains the following fields and options, all of which are highlighted with green boxes:

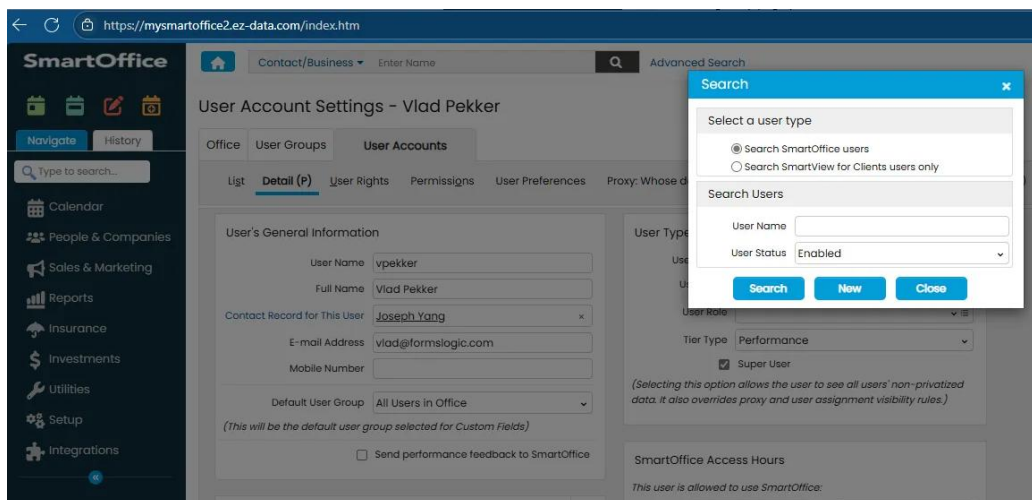
- Office:** A text input field containing "PTR_".
- User Name:** A text input field containing "vpekker".
- Password:** A password input field containing "*****".
- SmartOffice Pro:** A radio button that is selected.
- SmartOffice Anywhere:** An unselected radio button.
- Remember Me:** An unselected checkbox.
- Sign In:** A blue button.

Below the login form, there are links for "Forgot Password?", "Download the Microsoft Plugin Update", and "Privacy Policy".

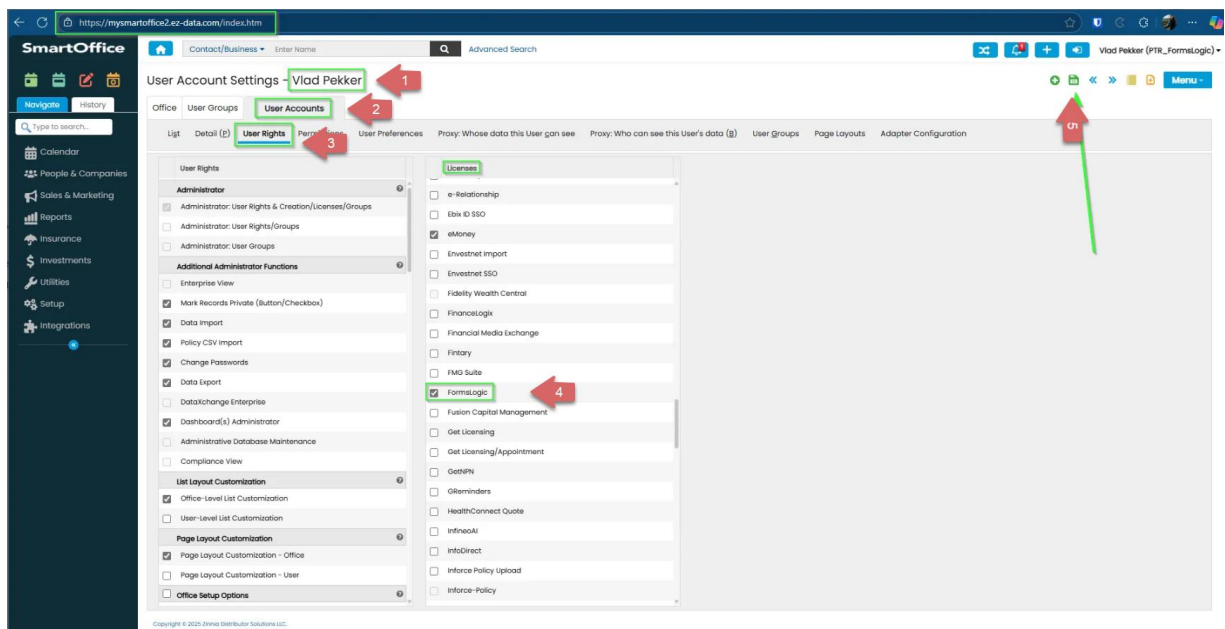
2. Once logged in, select **Setup** and User **Accounts** from the side bar.



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

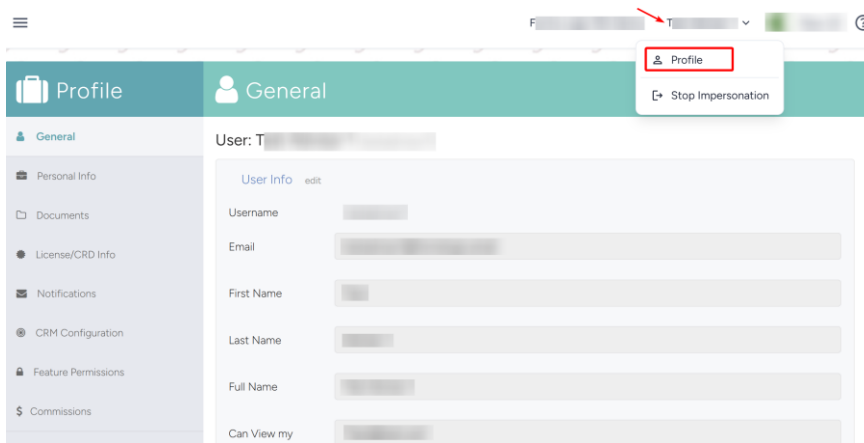


4. To enable the user's Forms Logic integration, follow these steps.
 1. Verify the User is correct.
 2. Click on the **User Account** Tab.
 3. Click on **User Rights**.
 4. **Check the box** for Forms Logic.
 5. Click the **Save icon** at the top of the page.

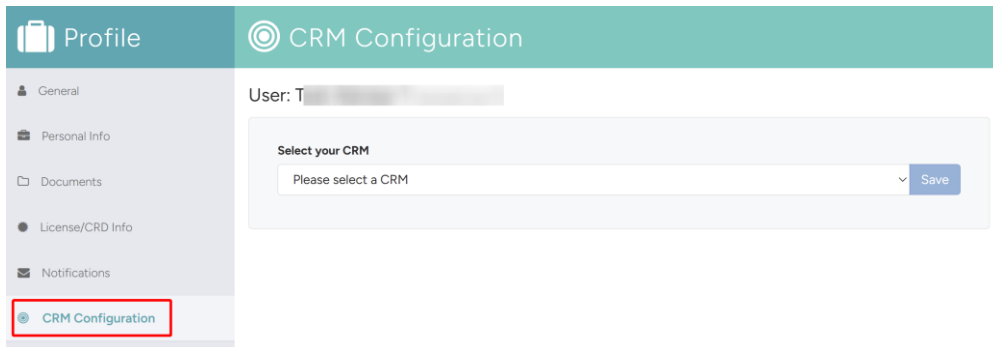


CONFIGURE IN FORMS LOGIC

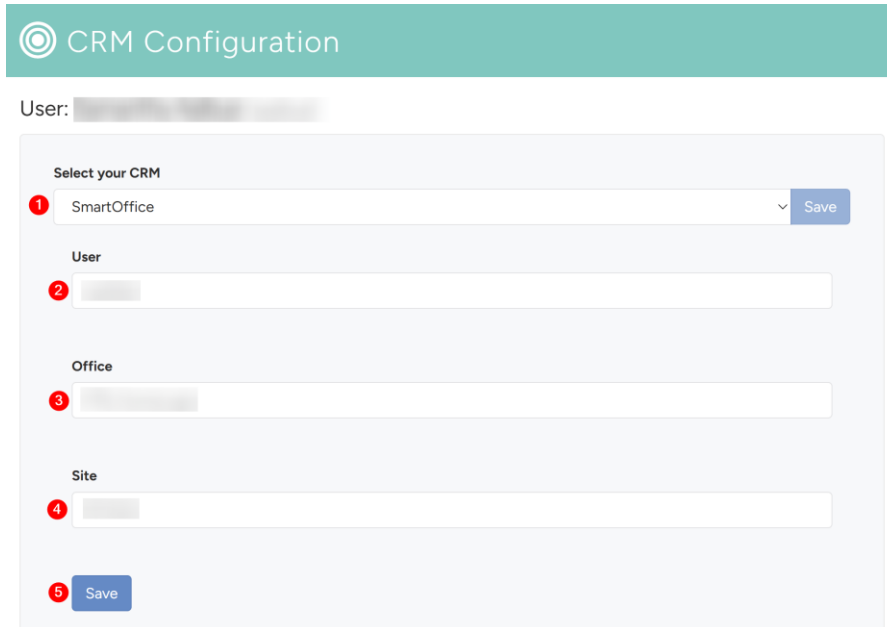
1. Click your user name in the upper right and click the **Profile** button from the dropdown. The Profile will load as shown below.



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 screenshot shows the 'CRM Configuration' form. At the top, there's a teal header with the FormsLogic logo and the text 'CRM Configuration'. Below this, a 'User:' label is followed by a blurred input field. The main form area has a light gray background and contains several sections. The first section is 'Select your CRM', featuring a dropdown menu with 'SmartOffice' selected, a red circled '1' to its left, and a blue 'Save' button to its right. The second section is 'User', with a text input field, a red circled '2' to its left, and a blue 'Save' button below it. The third section is 'Office', with a text input field, a red circled '3' to its left, and a blue 'Save' button below it. The fourth section is 'Site', with a text input field, a red circled '4' to its left, and a blue 'Save' button below it. A final red circled '5' is placed next to a blue 'Save' button at the bottom of the form.

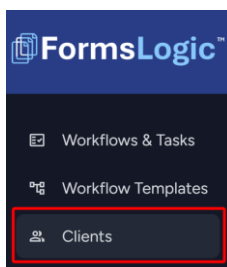
The Site Configuration value comes from the Smart Office URL while the user is signed in. For example, <https://mysmartoffice2.ez-data.com> becomes MYSO2. Other examples: MYSO, MYSO3, MYSO4, MYSO6, PPLUS, JHFN, PENN.

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**.

CRM Clients

User's CRM

Name Search

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.

CRM Client Name	Action
S	Create New Form Workflow
Matching clients: 1	