

➤ [visit the SmartOffice website](#)

VSR and Ebix have joined together to offer a special version of SmartOffice, a solution for Customer Relationship Management. This powerful web-based software gives you unprecedented scope and control by providing useful, intuitive data for understanding and servicing your clients. SmartOffice dynamically tracks and reports client contract information, correspondence and activity history, and commissions. Because the software is web-based, your important data is highly accessible, even away from the office. All you need is an internet connection.

Unlike most CRM packages, SmartOffice is squarely focused on financial services. It's developed and serviced by people who understand how your business works. It's also built to meet compliance standards, eliminating the headache and guesswork of self-preservation.

SmartOffice can import data from an existing database and integrates seamlessly with Microsoft Outlook.

SmartOffice's robust data tracking and tools make it a tremendous value. Powerful option modules are available as a la carte items, enduring that you get the tools you want, but pay only for what you use. To sweeten the pot, it's available through VSR at a discounted rate. Pricing is dependent on which modules you'd like to have, but all modules are discounted for VSR users.

There is also a specially priced package for the most common configuration. The VSR special package includes the SmartOffice Core System, SmartInvestments module (financial data and asset management), and Albridge SmartLink (Statement One integration). The discounted rate for this package is \$60 per user (regularly \$77).

SmartOffice Advisor Discount Program

The following discounted pricing is extended to VSR's Representatives:

SmartOffice for Registered Reps VSR Special Package	Retail Monthly User Fee	Discounted Monthly User Fee
SmartOffice Core System, SmartInvestments, SmartLink - Albridge AND SmartLink - Laser App	\$137	\$59
SmartOffice for Practice Management	Retail Monthly User Fee	Discounted Monthly User Fee
SmartOffice Core System (includes Laser App SmartLink)	\$51	\$30

There are many additional add-ons and other packages as well.