

SmartOffice® 7 Summary of Changes (Excerpts)

Introduction

This document features excerpts from release notes I created for E-Z Data's SmartOffice, a CRM application. This document also describes challenges I faced and explains my solutions to those challenges.

Product Description

SmartOffice is a Web-based contact management and calendaring application used primarily by financial services companies. Optional add-on modules are available for customers with more specialized needs, including insurance underwriting and policy tracking, event planning, sales and marketing, commission tracking, and investment planning.

Target Audience

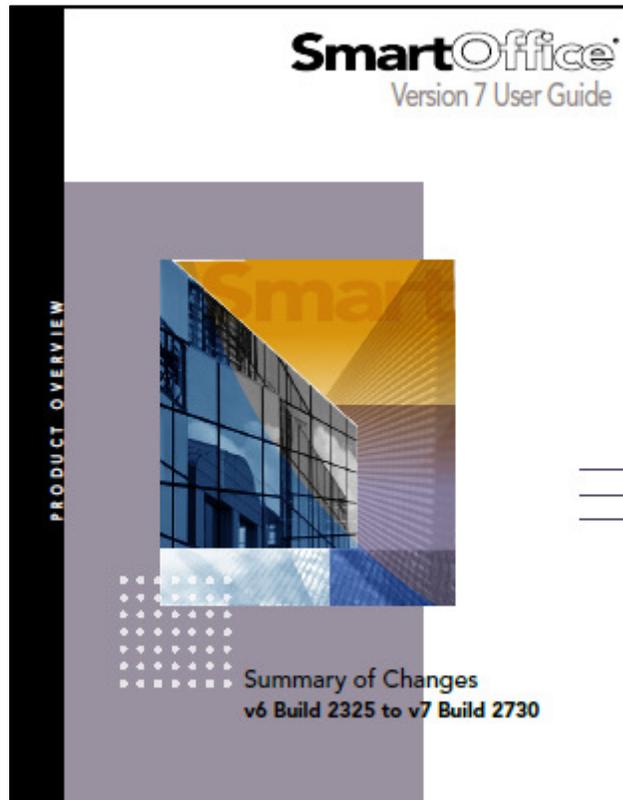
The audience consists of financial services professionals who have varying levels of experience using SmartOffice.

User Guide Objectives

The release notes describe the changes made to SmartOffice between version 6 and version 7, including new features ("enhancements") and bug fixes ("solutions") for each SmartOffice module.

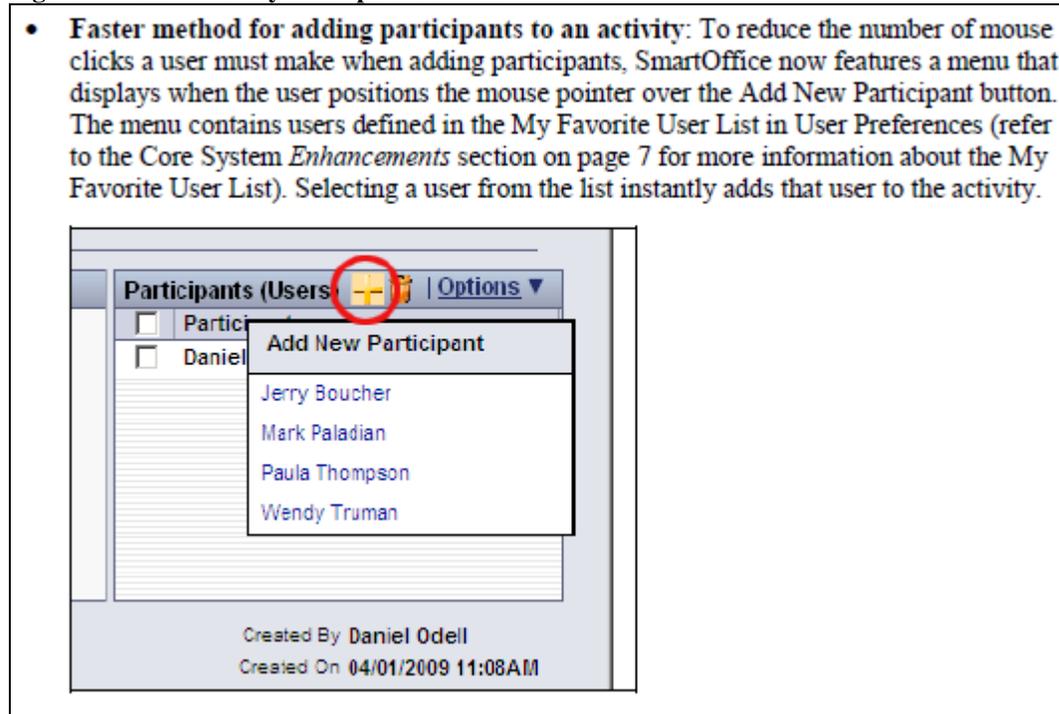
My Contribution

I collected information from product managers and from the company's bug-tracking system. I rewrote that information in a user-friendly format using Word, captured and edited the screenshots in Photoshop, and published the guide in PDF format using Acrobat.



Excerpts

Figure 1 – User-friendly descriptions of new features.



Past release documents simply listed new features with brief descriptions of their purposes, an approach that some customers found inadequate. In response, I was directed to begin explicitly describing the benefits of new features and how users could start using them right away (Figure 1).

- **The Challenge:** New feature descriptions had to include enough information to help the reader begin using the feature, but not so much information that the length of the document was needlessly increased. I had to keep in mind that this was release documentation, not a user guide.
- **My Solution:** I wanted to guide users to what I thought of as the “doorstep.” That is, I wanted to include just enough information so that the reader knew where the feature was located and which buttons or menu options invoked the feature. Some assumptions about the user’s level of knowledge were necessary. In the example in Figure 1, I assumed most users knew how to view the details of an activity and where the Participants section was located, because viewing activity details is a basic feature of the application. Working under that assumption, I omitted that information and focused on the new menu itself. I included the screenshot to help orient the user.

Figure 2 – Summarized list of new features.

Enhancement Highlights

This section briefly lists the major enhancements in this release of SmartOffice. This section is not a complete listing of all modules and enhancements. For complete information about these and other changes, refer to [Detailed Listing of Changes](#) beginning on page 7.

Core System

A major improvement in the core system is the introduction of **home page themes** — collections of home page features that users can select to instantly fill their SmartOffice home pages with reports, news and other data critical to their businesses. For details about home page themes, see page 7.

Other core system highlights in this release include:

- Office Favorites
- List grouping enhancements
- SmartPad quick search
- Contact deletion with holdings

A detailed list of all Core System changes begins on page 7.

SmartCalendar

- Activity report improvements and printing options
- Option to restrict activity creation to self
- Faster method for adding participants to an activity
- Marker indicating current time in calendar views
- Reschedule Activity button on Activity Search Results list
- Ability to change activity type colors from calendar views
- Activity reassignment improvements
- New Status drop-down list for task lists

A detailed list of all SmartCalendar changes begins on page 24.

SmartOffice release documentation usually began with a list of new features that tended to be too long, often containing as much detail as the main body of the document. I wanted to create a much more concise enhancement highlights section.

- **The Challenge:** This section had to offer the reader an at-a-glance overview of new features without overwhelming them with detail. It also had to guide readers to additional details.
- **My Solution:** I pared down the new feature descriptions to read more like the headlines found on a news Web site or in an RSS feed (Figure 2). This approach

allowed the user to scan the list of enhancements and gain an understanding of the new features quickly. The page references at the end of the bulleted lists gave readers clear entry points into the main body of the document, where the new features were described in more detail.

Figure 3 – Addressing potentially confusing changes in terminology.

PDF Reports

Note: The terminology used for referring to PDF reports has changed in SmartOffice v7.

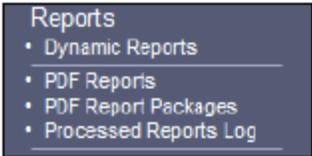
The terms “packaging reports” and “non-packaging reports” are no longer used to refer to reports that do/do not prompt the user to select options when they are run. These changes were made to prevent confusion with the new PDF report packages feature in SmartOffice v7.

In addition, individual PDF reports that the user can run to display results immediately for multiple contacts are now called “on-demand reports.” This change was made to distinguish this method of running reports from the report package method now available in SmartOffice v7.

Enhancements

- **PDF report packages:** The user can now process and access PDF reports more efficiently by adding multiple reports from different report categories to a report package. A report package can be run overnight, or the user can create a small report package (with up to five reports) to be posted to the Job Queue and processed within a few minutes.

To view and create report packages to be run overnight, select **PDF Report Packages** from the expanded **Reports** menu.



From the Report Packages list, click the New ‘Package’ record button to create a package.



Follow the instructions in the dialog boxes to finish creating the package.

One of SmartOffice 7’s new features was called “PDF Report Packages,” which unfortunately sounded very similar to an unrelated feature known as “packaging reports” in the previous version of the application.

- **The Challenge:** Users had to be clearly informed about the change in terminology to avoid confusion between the similarly named features.
- **My Solution:** I approached the product manager with the idea of placing a note at the beginning of the PDF Reports section explaining the terminology issue. After obtaining the product manager's agreement, I wrote the note and inserted it in a box with a bold "Note" lead-in (Figure 3). I then followed the note immediately with a description of the new PDF Report Packages feature. In doing so, my goal was to reinforce the information in the note and to immediately associate the "package" terminology with the new feature in a concrete way.