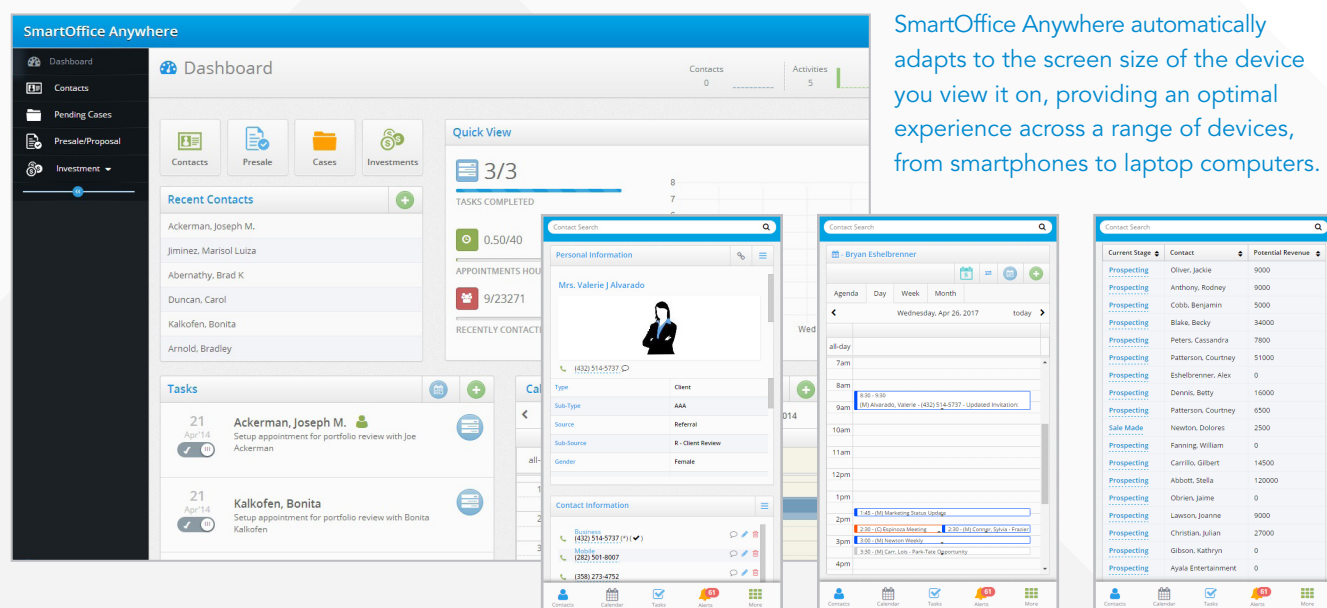# SmartOffice Anywhere

Take your client data wherever your business takes you

In today's technology-fueled economy, the data you collect about your clients is the lifeblood of your business. If you can't access that data the moment you need it, you can miss out on opportunities to increase your productivity, provide exceptional service to your clients and generate new business.

That's why mobile technology solutions built for professionals like you are so critical. Mobile solutions have changed the way businesses manage and interact with their clients. The best of those solutions are always on and always at hand, delivering the information you need, when you need it.

SmartOffice Anywhere automatically adapts to the screen size of the device you view it on, providing an optimal experience across a range of devices, from smartphones to laptop computers.

Your Client Data Anywhere

SmartOffice Anywhere is a fast, user-friendly, mobile-optimized portal into your client database. Powered by SmartOffice, the premier customer relationship management (CRM) solution from Ebix, this solution is based on a mature, proven platform built specifically for the financial services industry.

SmartOffice Anywhere is available wherever you have access to an Internet connection, and it works on the device you have with you—regardless of screen size—with support for the vast majority of today's smartphones, tablets and laptop computers.

With SmartOffice Anywhere, it has never been easier to collect, manage and leverage your valuable data to enhance client interactions in the field. Suppose you're visiting a client and you want to jot down a few notes about items you want to follow-up on. With a few taps on your smartphone, you can open that client's contact record and enter those notes. Because the notes are saved instantly to your SmartOffice database, your assistant back at the office can access them immediately and act on them. Later, when you switch to your laptop, you can open SmartOffice Anywhere and access the same up-to-date data, reformatted to take advantage of the larger screen.

The Tools You Need to Succeed

The ease with which you can transition from one device to another and one location to another helps you save time and effort while you carry out the tasks that are so important to keeping your business running smoothly. SmartOffice Anywhere delivers convenient access to the tools you need most, including:

- **Contact management:** Search, view and update client contact information (phone numbers, e-mail addresses, etc.), personal information and notes.
- **Calendar management:** Schedule calendar activities and mark daily tasks done.
- **Productivity metrics:** Gain insights into your productivity and accomplish common tasks from a central dashboard.

The list of things you can do with SmartOffice Anywhere is constantly expanding. Ebix is committed to adding new features and improving existing features to serve the diverse needs of growing businesses.

Contact Detail Screen

SmartPad

Investment Positions

Unlock the Power of Mobile

SmartOffice Anywhere helps you maximize the potential of your client data by making it instantly available to you no matter where you are or what device you're using. It's an ideal solution for connecting with clients and colleagues while you're on the road, making the most efficient use of your time and staying competitive in an increasingly mobile world.

SmartOffice Anywhere Compatibility	
Operating Systems	**Browsers**
Windows	Chrome
Mac OS	Firefox
iOS	Safari
Android	