

Installation Questionnaire

Customer Information

(Complete Each Field)

|  |  |
| --- | --- |
| Company Name |  |
|  |  |
| Company Address |  |
|  |  |
| Company Phone |  |
|  |  |
| Primary Contact Name |  |
|  |  |
| Primary Contact Cell Phone |  |
|  |  |
| Primary Contact Email |  |
|  |  |
| IT Company Name |  |
|  |  |
| IT Company Address |  |
|  |  |
| IT Company Phone |  |
|  |  |
| IT Primary Contact Name |  |
|  |  |
| IT Primary Contact Cell Phone |  |
|  |  |
| IT Primary Contact Email |  |

**All data collected in this process and information shared back to customer and or vendor is confidential and proprietary.**

**Treat your data as if your business depends on it – WE DO!**

**SERVER INFORMATION**

**(Complete With Your IT Professional)**

|  |  |
| --- | --- |
| SMTP Server Address (IP) or SMTP Host Name |  |
|  |  |
| SMTP user or email address  ([SmartAdvocate@hostserver.com](mailto:SmartAdvocate@hostserver.com)  Required prior to SmartAdvocate installation and to be provided by licensee) |  |
|  |  |
| SMTP Password |  |
|  |  |
| SMTP Server Port |  |
|  |  |
| Microsoft Word and Excel 2010 or better Installed on all Workstations  (Required prior to SmartAdvocate installation and to be provided by licensee) | YES or No |

Re: Use of Microsoft Office 365

SmartAdvocate is fully compatible with Office 365 and after the installation there will be additional reconfiguration to be performed if your office uses Office 365. There are several parameters in the System Parameters (Internal) administrative page with the Group Description “Email Settings.” These list the email account and credentials used to send email from SmartAdvocate. The “EmailServer for emails” parameter will definitely need to be updated to reflect the Office 365 SMTP server; the others (in particular the port) may also need to be changed as appropriate.

Additionally, Office 365 requires that the account SmartAdvocate uses has permission to Send As every user who is actually using the SmartAdvocate system. Therefore, you will need to go to the Office 365 Admin Center, and for each separate user (other than the one SmartAdvocate itself uses, listed in the parameters noted above), do the following:

Edit the user’s Mailbox Permissions. In the Mailbox Permissions, go to the list of accounts that “are permitted to Send As this user.” Add the account SmartAdvocate uses to this list. Save changes if prompted, and repeat for the next user. Every time a new user is added to the system, it will be necessary to add the SmartAdvocate account to the Send As permissions for the new user as detailed above.