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CRM. (Powered by SmartOffice)
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Ebix CRM Partners - Delivering the Power of Integration

All you need to know to successfully use SuiteCRM as an End-User, Developer or Administrator, plus Community Guidelines and Technical Blog.
Administrator Guide :: SuiteCRM Documentation Demo

Administrator Guide :: SuiteCRM Documentation

A leading international supplier of On-Demand software and E-commerce services to the insurance, financial and healthcare industries, Ebix, Inc., (NASDAQ: EBIX) provides end-to-end solutions ranging from infrastructure exchanges, carrier systems, agency systems and risk compliance solutions to custom software development for all entities involved in the insurance

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industry.

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Ebix Exchange channel - Life & annuity solutions

Index page showing administration, system, user and app configuration for Dynamics 365 Marketing. admin Administrator Guide (Dynamics 365 Marketing) | Microsoft Docs

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The user now has a free Marketing license and should be visible in the user-admin interface in a few minutes. Assign the appropriate security roles to grant the new user access to the required Marketing features, as described in the next section. The app doesn't allow access to any user who does not have at least one relevant security role.

Manage user accounts, user licenses, and security roles ...

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Policy / Super Admin. Overview; Features; Options; Compare; ...

Super Admin - Ebix Australia - On-demand Insurance Solutions

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Insurance Software Solution | Insurance Software ... - Ebix

WinBEAT Database Services. Allows merging of one or more Underwriters, Account Managers, Subintermediaries, Client Groups or Policy Classes. The

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Database Services programs have been written to allow you to 'clean-up' your database by deleting old and unused Underwriters, Policy Classes, Sub Intermediaries, Account Managers and Client Groups and merging them into other Underwriters, Policy ...

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There is a helpful user guide which is available for free download here. A range of training videos which can be accessed via the SmartOffice program are also available. The link, titled 'Help/Training' can be found in the top right hand corner of the SmartOffice window, or access the Training Centre here.

User Guide and Other References - Ebix Australia - On ...

SmartOffice is a CRM developed by Ebix specifically to meet the marketing and sales needs of insurance professionals. It is easily integrated with any Ebix

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broking system thanks to EIS (Enterprise Integration Service). ... User Guide and Other References SmartOffice offers a range of user support. ... With Administrator rights, you can set and ...

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