

## Quick Reference Guide

- Home-** Welcome Page of Smart Trac
- My Files-** Files that are currently active, closed, or cancelled
- Search Property-** Properties that are in the public tax records
- Search Office or User-** Users who have access to Smart Trac
- Farming-** Search areas you are currently working
- Contacts-** Search or save client information
- Settings-** Update personal profile, add favorite service provider, update external accounts
- Help-** Get more information Smart Trac training, manuals, and support information
- Log Off-** Sign out of Smart Trac



The screenshot shows the Smart Trac home page interface. At the top is a navigation bar with links: Home | My Files | Search Property | Search Office/User | Farming | Contacts | Settings | Help | Log Off. Below the navigation bar, it displays 'Current File: 33333 POLY' and 'Create a New File ■ Close Files ■ To Do List'. A welcome message reads 'Welcome Jennifer Chan'. The main content area is divided into three sections: 'My Files' (a table with columns 'File Name' and 'Tracking'), 'Things To Do Today' (a message box stating 'You have no To Do items due today or past due.'), and 'My New Messages' (a message box stating 'You have no new messages.' with a 'Compose' button). Red arrows point from callout boxes below to these sections.

To Do Items that are currently due or past due.

Check email messages sent by someone using the system. Also, the system lets you compose and send emails to anyone.

Files you currently have in Smart Trac. You may add participants, add documents, order services, or To Do Templates, etc.