### **Introduction to Attachments**

This document contains instructions for setting up and using the Attachments feature. You can now attach files of many different types to a variety of locations within Acowin. Attachments can include word processing documents, spreadsheets, graphic images (including scans and digital photographs), and Adobe Acrobat PDF files. Acowin can also work with Microsoft Word to produce "merge" documents, which instantly draw information from Acowin to fill in customer names, addresses, phone numbers, and other fields on standard Master Documents you have prepared in advance.

## Creating the Attachment Drive

To use the Attachments feature of Acowin, you must prepare a special shared Attachments folder. This folder could be on any storage device that can be accessed from your Acowin server, including one of the server's internal hard disks, a hard disk on a different network computer, or an external mass storage device. Be sure to allow plenty of space for the Attachments folder - if you attach a lot of graphic images and large word-processing documents, the Attachments folder could become quite large. Also, you should make some arrangements to have the Attachments folder backed up periodically. You could add it to the list of folders backed up by an automatic unattended tape backup, or you could periodically copy the Attachments folder onto a tape, memory stick, CD, or data DVD. **Note:** the Acowin Backup utility does **not** back up the Attachments folder! It only backs up the Acowin data.

To create the Attachments folder, open the My Computer icon on whichever computer you have chosen to contain your attachments. Navigate to the folder where you want to keep the attachments, then pull down the File menu and choose New >> Folder. Name the new folder **Attachments**. In the example pictured below, the Attachments folder has been added to drive C: of the Acowin server computer.

🐲 Local Disk (C:)								
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G Back - Address	Sec:↓						▶ →	Go
System Tasks 🛞	-							^
ilde the contents of this drive	\$VAULT\$.AVG	acowin	Acowin Tutorial Test	Attachments	Corel	DELL	DemoShield Extras	=
Add or remove programs								
Search for files or folders	Documents and Settings	DRIVERS	Exports From Acowin	filed	I386	John's Help	My Music	
File and Folder Tasks 💲								
Rename this folder	Output	pdf995	Program Files	psp	TEMP	TMS	TMSTruck	~

The Attachments folder must be **shared** to allow network access. To activate sharing, *right-click* on the Attachments folder, then choose Sharing and Security. Select the option to share the folder on your network, and be sure to also allow network users to **change** the contents of the folder. In the "simple file sharing" mode of Windows XP, the ability to change the contents of the folder is granted with a simple check box, as pictured below. In the more complex Windows file sharing system, there will be a Permissions button that you can click to grant different levels of access to different groups of users. You would want to ensure that all groups of users have full read and write access to the Attachments folder.



With the Attachments folder shared, your final task is to create a **mapped network drive** on the server. **Every** Acowin computer needs such a mapped network drive, including the server and **all** workstations. On the Acowin server computer, open the My Documents icon, then pull down the Tools menu and choose Map Network Drive. You can select any drive letter you wish for the mapped drive, but you must choose the **same drive letter** on **all** computers. In other words, if the attachment drive is assigned letter "W" on your server, it must be assigned letter "W" on all of the workstations, too. Set the target folder of this mapped drive to the shared Attachments folder.

**Note:** Even if the Attachments folder is a local folder on the server's hard drive, you **must** create a mapped network drive that is connected to it. If the Attachments folder is on the server's hard drive, this will leave you with a mapped "network" drive that actually points to a folder right on the server's local hard drive. In the example below, the network drive mapped to the Attachments folder is drive letter Y, which you can see at the bottom of the screen, under

Network Drives. Drive letter "Y" would need to be mapped to the Attachments folder on all of the Acowin computers.



Once you have created the mapped network drive for the Attachments folder, go to **Setup / Settings / Miscellaneous** in the Acowin program.

<ul> <li>Place new notes at the TOP of history files.</li> <li>Place new notes at the BOTTOM of history files.</li> </ul>	Miscellaneous Settings Service Flat Rate ✓ Show Flat Rate Tax ✓ Calculate Flat Rate Tax	Default Invoice For Call Slip Contract	CALLSLIP V CONTRACT V
Print Cust ID / Site ID on Invoices   Job Costing / Purchase Orders   Image: Transfer quantity when posting receiving slip   Create seperate PO per vendor   Show FreeKey items on Proposal	Diary Setup Alert status within 1 days Notify status within 3 days	Service Charges Job Cost Automatic Reminde Contract Insp Contract I	SRV CHRG V JOBCOST V ers (1-28) nvoices 0 (1-28)
Quick Credit Call Slip Problem Code CREDIT 💌 Resolution Code 9credit 💌	Attachment Drive Y Attachment UNC \\Hayjohn\A Save Cancel	utachments	

On the Miscellaneous setup screen, you'll see a field called **Attachment Drive**. Enter the mapped network drive letter of the Attachments drive in this field. In our example above, this would be drive letter "Y". In the **Attachment UNC** field, enter the computer name and share name of the Attachments folder, in this format: <u>\\server\share</u>, where "server" is the name of the computer holding the Attachments drive, and "share" is the name the Attachments folder was shared under. This is the same path your mapped network drives are pointing to. Click Save to save your changes after you enter the Attachment Drive letter. The Attachments system is now set up and ready to use.

# **Specifying File Extensions**

Every Windows data file ends in a three-letter "extension", which is meant to indicate what type of file it is. For example, files that end with the extension ".jpg" are JPEG image files, while the extension ".doc" indicates a Microsoft Word document. Acowin allows you to provide a short description for each file extension, making it easy for you to tell what kinds of files are stored in the Acowin Attachments system.

To specify file extensions and descriptions, go to **Setup / Settings / Attachment Extensions.** You'll see that many of the most popular file types are already listed and described. For example, the extension "PDF" is already listed as "Adobe Portable Document Format." You can click the New button to add new file extensions and descriptions to this list. Click the Save button to save your work when done making additions or revisions.

Extensi	ion BMP	_	
Descripti	ion Bitmap	N	ew
	Extension	Description	
	BMP	Bitmap	
	CSV	Excel - Comma Delimited	
	DOC	Microsoft Word Document	
[	JPG	Joint Photographic experts Group	
[	PDF	Adobe - Portable Document Format	
	TXT	Text file	
	XLS	Microsoft Excel Document	
[			
			Delete
Close			Save

# **Attaching Files to Acowin Entries**

You can attach files to the following locations in Acowin:

Customers

- Sites
- Equipment
- Call Slips
- Contracts
- Project Management
- Purchase Orders
- Receiving Slips
- Vendors
- Vendor Bills
- Inventory

Each of these locations has an Attachments button, which contains the image of a folder, as pictured below.



When you click the Attachments button, you'll see a list of all the files that have already been attached to the selected record. Remember that Customers and Sites have different lists of Attachments, even though they're two sides of the same Customer/Site File. A Customer can have its own list of Attachments, and each of its work Sites can also have its own list of Attachments.

	Attachı	nents		
Ref Type Customer Ref # 01002	Description Lee	: Coast Ente	erprises	
Description	Attached	User	File Name	~
▶Hello from TMS!	04/07/06	JOHN	workfile.doc	
Inventory Import File	04/07/06	JOHN	GOODINVENTORYFILE2.TXT	
Graphic Image	04/07/06	JOHN	1.JPG	
-				
				~
Close Show Show	v Active 🛛 🔽	Op	en File Add File Delete	File

You can select one of the existing attached files and click the **Open File** button to view it. The application associated with the chosen file will launch automatically.

You can click the **Add File** button to select a new file and turn it into an Attachment. The standard Windows file selection window will appear, allowing you to locate the file you wish to attach. The file can be stored anywhere you

can access from your computer, including a CD, memory stick, or other removable media. Virtually any type of file can be made into an Acowin attachment.

Open								?×
Look jn:	🚞 Images		*	G	ø	P 🖪	•	
My Recent Documents Desktop My Documents	BKGRNDS BUTTONS Cookin.mainme Default_logo.br generic_globe_ millennialvisions tms.logo.jpg	nu.bmp np lago.bmp 2001_xmen-storm.jpg						
Wy Computer								
	File <u>n</u> ame:					*		ок
My Network	Files of type:	Bitmap				*		ancel
							Code	Page

After you locate and select the file you wish to attach, you'll be asked to provide a short description of the file. Click the OK button when done. The file will be added to the list of Attachments for the chosen Customer, Site, Contract, or Job.

Attached 04/10/2006 User JOHN	File Name DEFAULT_LOCO.BMP
Description Lee Coast	Enterprises Logo Image
	Click OK, or your attachment will not be saved.
	Cancel Ok

If you want to remove a file from the list of Attachments, select the file and click the **Delete File** button.

#### **Changing Associated Applications**

You can review or change the applications associated with each file type in Windows, by clicking **Start / Control Panel / Folder Options**, and choosing the **File Types** tab. The example below shows how files ending in ".csv" are associated with Microsoft Excel. You can change the associated applications from this screen, if you wish. Note that many applications will automatically offer to associate themselves with the types of file they can handle when you install

them. For example, if you install a graphics design program, it will probably offer to associate itself with all of the graphic file types it can handle.

Folder Option	S	?×
General View	File Types	
Registered file	types:	
Extensions	File Types	
CSV	Microsoft Excel Comma Separated Values File	
🔏 СТТ	Messenger Contact List	
🗖 CUR	Cursor	
💽 СОТ	Paint Shop Pro 5 Image	
🔊 DB	Data Base File	
DBD 🗋	DBD File	~
	Daint Chan Bro Filmaga	
	New Delet	•
← Details for 'C	SV' extension	_
Opens with:	Microsoft Excel for Window Change	
Files with ex Separated V Excel Comm	tension 'CSV' are of type 'Microsoft Excel Comma 'alues File'. To change settings that affect all 'Micro a Separated Values File' files, click Advanced.	osoft
	Advanced	Ð
	OK Cancel	pply

## **Creating Master Merge Documents**

Acowin has the ability to merge Customer, Site, Contract, or Job data with standard "form letters" created with Microsoft Word. To take advantage of this feature, you can create a set of **Master Documents**, which are like "templates" that include designated locations for customer names, addresses, phone numbers, Job numbers, or other important information. When you create a merge document, Acowin will automatically replace these "place holder" marks with the correct information. You **must** have Microsoft Word installed on your system to take advantage of this feature.

To create Master Documents, go to **Setup / Settings / Master Document Setup.** You'll see a list of all the Master Documents you've already created. The **Select Type** pull-down menu will allow you to review the four different types of Master Document: Customer, Site, Contract, and Job. These are totally separate document types, since each one has different fields available for use in creating the Master Documents. The example pictured below is a list of the Master Documents that are suitable for use with Customers.

		Mas	sters Setup				
Select Type	Customer	~	Select SubType	Generic		~	
		Description			Attached	User	^
Hello Letter					04/07/06	JOHN	
Customer Satisfa	action Survey				04/10/06	JOHN	
							_
							_
-							_
							_
							~
Close	Show	Show Active	<b>v</b>	Open File	Add File	Delete F	ile

To create a new Master Document, click the **Add File** button. This will launch Microsoft Word. You'll see that a special pull-down menu called **Insert Merge Field**. Clicking this pull-down menu gives you a list of the fields available from Acowin, and drops a "place holder" at the current position of your cursor. For example, selecting the Customer City, State, and Zip field inserts a merge field called ((custcsz)) in the Master Document, setting the space where the customer's city, state, and zip code will go, each time you create a merge document. You can use as many of these merge fields in your Master Document as you want, and you can use the same merge field several different times at different locations in the document. Here's an example of a Master Document for the Customer data, designed to serve as a customer satisfaction survey:

🖻 master.doc - Microsoft Word											_6	X
Eile Edit View Insert Format Iools Table Window	Help											×
🗅 🚅 🖬 🔒 🎒 🕼 🖤 🐰 🗈 🋍 💅 🗠	• 🖂 - 🍓	Norm.	al 🛛 🚽 Tim	es New Roman	- 12 - 1	B <i>I</i>	U	 38	f f	E 💮	• 🖉 •	. »
Insert Merge Field - Insert Word Field - 🙁 H 🔸	1	N 📑 🛛	V 🔤 🎭 Me	rge 🙀 🛒	-							
L	. 3 1	4	5 .			1 1 7		 	 			
Team Air Customer Satisfacti	on Surv	ov										
	on surv	c,										
Customer Name: «lastname», «firstna	me»				1							
Customer Address: «address1»												
«address2»												
Custosz»												
E-mail: «email»												
					1							
We at Team Air would like to take a mome help us reach our goal of 100% customer s moments to complete the attached survey a Please be sure to contact us if you have any	ent to thank atisfaction, ind return it 7 additional	you for yo we hope yo to us at yo questions	our business. ou will take our earliest c or concerns.	In order to a few onvenience.								
Please select one of the following ratings:	Poor	Fair	Good	Excellent								
Speed of technician response												
Quality of service												
Value for money												
Technician friendliness and conduct												<b>_</b>
Neatness and cleanliness												2
Phone center customer service												•
					-							•
Draw - 🗟 🌀 AutoShapes - 🔪 🎽 📿 🎒	4 🗷 🔌	• 🚄 • 🗛	• = = =	• 🗊 •								
Page 1 Sec 1 1/1 At 3.6" Ln 14	Col 83	REC TRK EX	t ovr 💵									

Notice how the merge fields have been used to set up the customer's name, address, phone number, and e-mail in the upper part of the page, plus the salutation to "Mr. Or Mrs. ((lastname))".

When you're finished with the Master Document, be sure to save it, by pulling down the File menu of Microsoft Word and choosing Save, or clicking the Save button on the Microsoft Word toolbar. You can then close or minimize Microsoft Word. You'll see a window from Acowin, requesting that you give the new Master Document a description, then click **OK** to save it.

Attached 04/10/2006 User JOHN
Description Customer Satisfaction Survey
Before you click OK to close this Attachment screen, you MUST save your work and close the external application containing the attached document. This includes Microsoft Word, Excel, Notepad, or any other programs you are using to work on attached documents.
Close your external application first, then click the OK on this screen., or your changes will be lost.
Cancel Ok

# **Creating Merge Documents**

Once you've created some Master Documents, you can produce merge documents by clicking the button that looks like the Microsoft Word symbol. This button is found right next to the Attachment button, in the Customer/Site File, Contract File, and Job File.



When you click the Merge button, you will be asked to give a Description to your new merge document, and then click Next.

		Genera	nte Docu	nent					
Ref Type Ref #	Customer 01001	Description	Miller,	Stephanie					
This fea informal Master toolbar t below t click Ne Docume instantly	This feature will allow you to use a Master Document, plus the selected Customer, Site, Contract, or Job information, to produce a new letter, renewal notice, proposal, or other document with Microsoft Word. The Master Documents are prepared in Setup/Settings/Master Document Setup, which launches Word with a special toolbar that lets you insert "merge fields" that will be replaced by Acowin data. Use the DESCRIPTION field below to describe the new document you are about to create, for example "New A/C System Proposal." Then click Next, and choose from the list of Master Documents you have prepared. After you choose a Master Document, Microsoft Word will be launched, and a new final document will be created, with all the merge fields instantly filled by data from the Customer, Site, Contract, or Job you have selected.								
Enter a	description for the new docu	ment and click	next		Attached User	05/30/2006 John			
Descrip	otion Customer Satisfa	ction Lett	er						
Cancel						Next			

You will see a list of Master Documents available for the type of merge you're performing. Remember there are different types of Merge Document for Customers, Sites, Call Slips, Contracts, and Jobs. Select a Master Document and click Next.

		Generate Do	cume	nt	
Ref Type	Customer				
Ref #	01001	Description Mill	er, St	ephanie	
Select the	e Master document and click ne	ext			
	Description	ı		Sub Type	^
Hello L	etter		(	Generic	
Custon	ner Satisfaction Survey			Generic	
					_
					_
					_
					_
Gunnel					
Cancel					Next

The system will launch Microsoft Word, then use the information from your selected Customer, Site, Contract, or Job to fill out all the fields in the Master Document you have chosen. The result will be a document personalized for the customer or project you're working with. The example below uses the "Customer Satisfaction Survey" that was used as an example for creating a Master Document, above. Note how all the merge fields have now been replaced by the information for the specific Customer that was selected for this merge document.

# Team Air Customer Satisfaction Survey

Customer Name:	Miller, Stephanie
Customer Address:	93710 Cypress Lake Drive
	Fort Myers, FL 33907
Phone:	(239)437-3030
E-mail:	smiller0999@aol.com

Dear Mr. Or Mrs. Miller,

We at Team Air would like to take a moment to thank you for your business. In order to help us reach our goal of 100% customer satisfaction, we hope you will take a few moments to complete the attached survey and return it to us at your earliest convenience. Please be sure to contact us if you have any additional questions or concerns.

Please select one of the following ratings:	Poor	Fair	Good	Excellent
Speed of technician response				
Quality of service				
Value for money				
Technician friendliness and conduct				
Neatness and cleanliness				
Phone center customer service				