

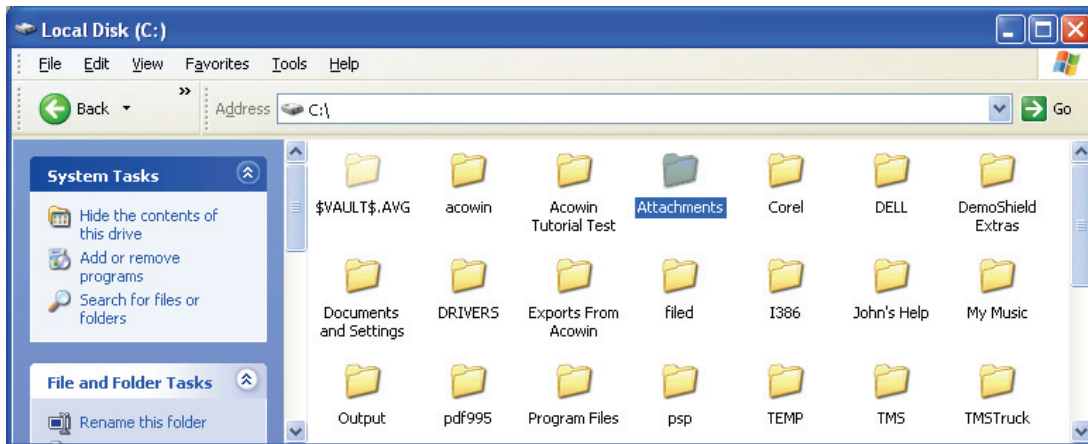
Introduction to Attachments

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.

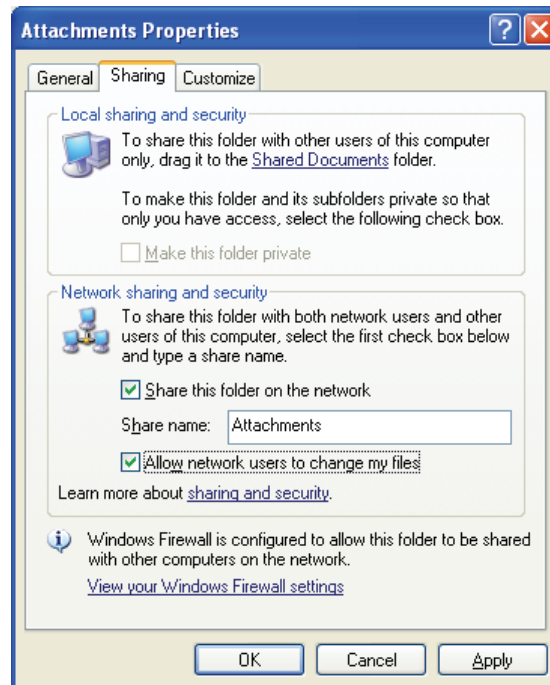
Creating the Attachment Drive

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.



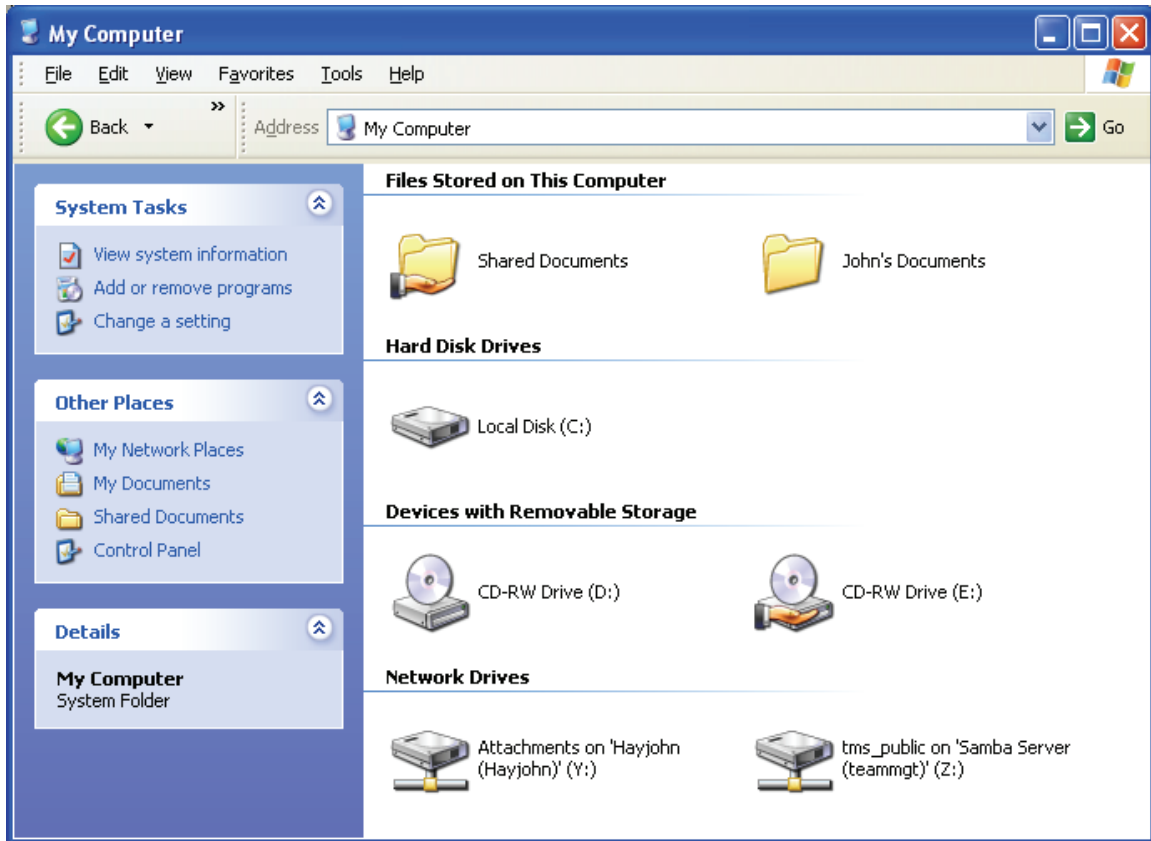
The Attachments folder must be **shared** to allow network access. To activate sharing, *right-click* on the Attachments folder, then choose Sharing and Security. Select the option to share the folder on your network, and be sure to also allow network users to **change** the contents of the folder. In 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.



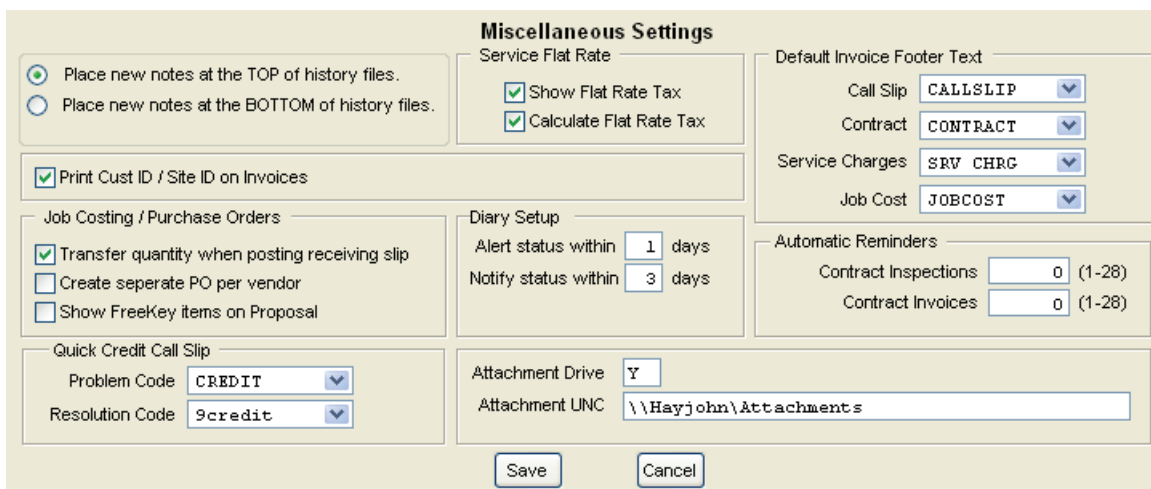
With the Attachments folder shared, your final task is to create a **mapped network drive** on the server. **Every** Acowin computer needs such a mapped network drive, including the server and **all** workstations. On the Acowin server computer, open the My Documents icon, then pull down the Tools menu 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.



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: \\server\share, 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.

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

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.

Attachments

Ref Type

Ref # Description

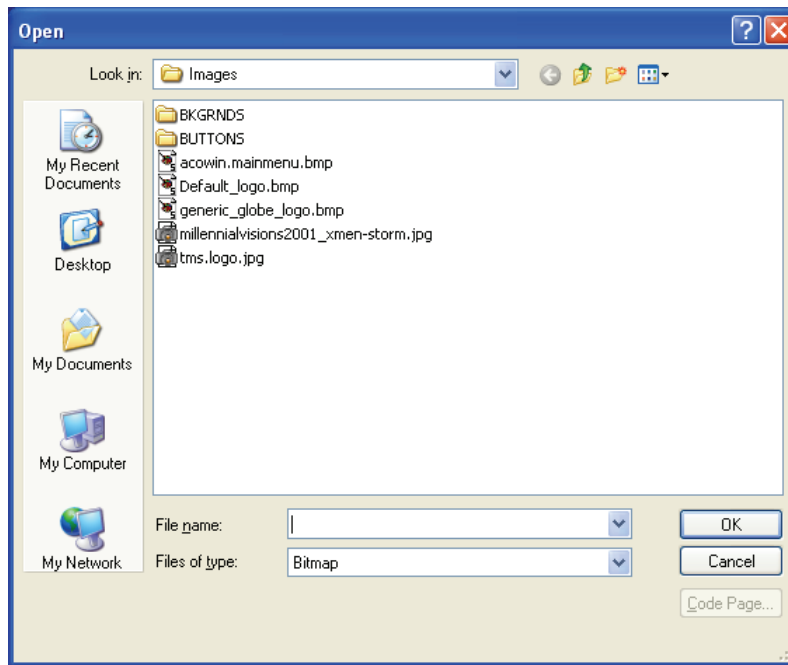
Description	Attached	User	File Name
▶ Hello from TMS!	04/07/06	JOHN	workfile.doc
Inventory Import File	04/07/06	JOHN	GOODINVENTORYFILE2.TXT
Graphic Image	04/07/06	JOHN	1.JPG

Close Show

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.



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.

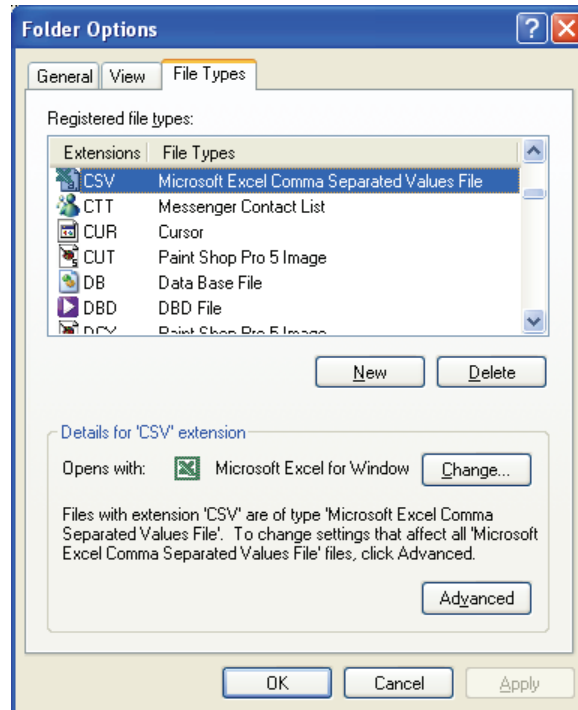


If you want to remove a file from the list of Attachments, select the file and click the **Delete File** button.

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.



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.

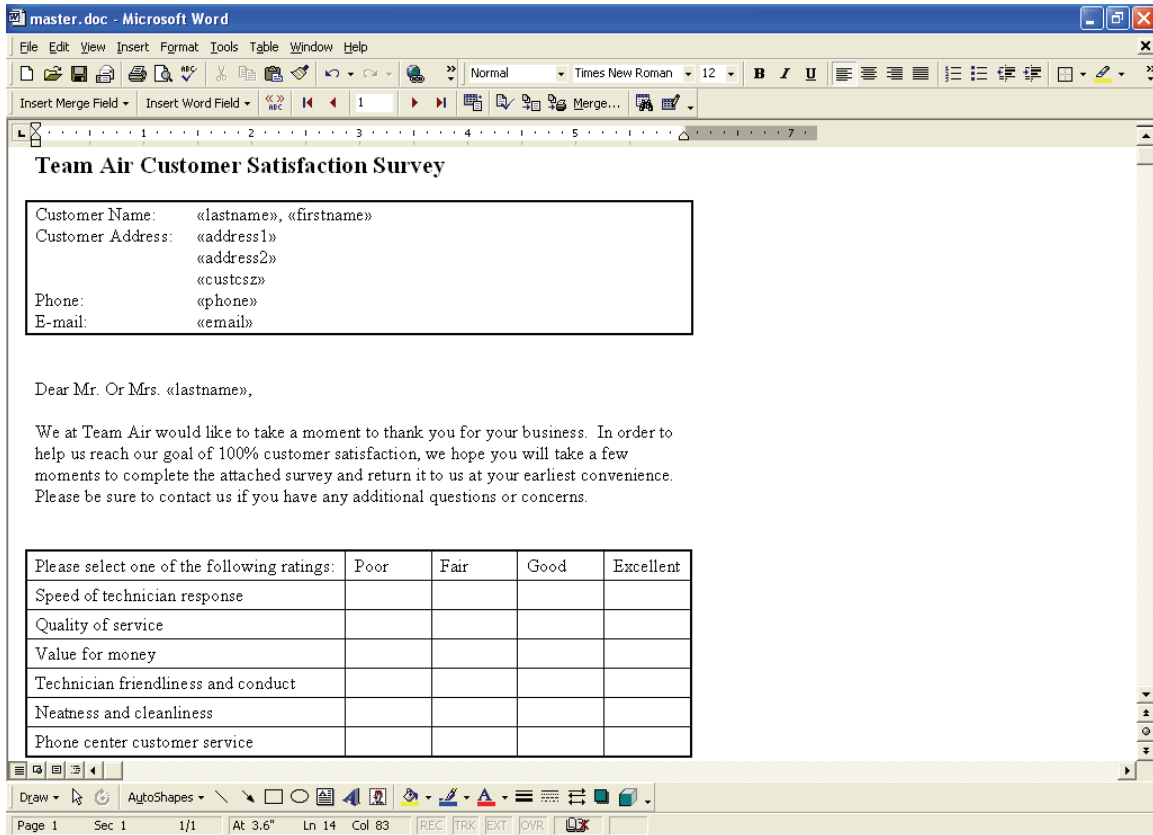
Masters Setup

Select Type: Customer Select SubType: Generic

Description	Attached	User
▶ Hello Letter	04/07/06	JOHN
Customer Satisfaction Survey	04/10/06	JOHN

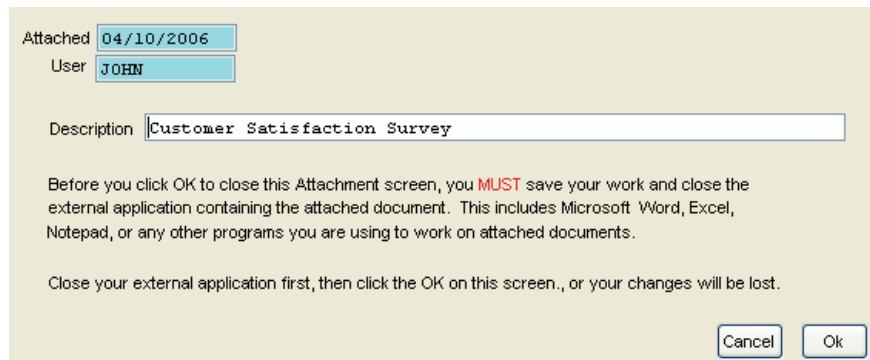
Close Show Show Active Open File Add File Delete File

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:



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.



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.

Generate Document

Ref Type	Customer		
Ref #	01001	Description	Miller, Stephanie

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 document and click next

Attached: 05/30/2006
User: JOHN

Description: Customer Satisfaction Letter

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 Document

Ref Type
Ref # Description

Select the Master document and click next

	Description	Sub Type	
<input checked="" type="checkbox"/>	Hello Letter	Generic	<input type="button" value="▲"/>
<input type="checkbox"/>	Customer Satisfaction Survey	Generic	
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			<input type="button" value="▼"/>

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				