## Fast•Class File

Client Data System

## Volume 28: Attaching Files to the SmartPad

To attach a file to a contact SmartPad record:

• With a contact's SmartPad record open, click on the Attach File button.

	imartPad -	Ackerma	n, Joseph (50)	
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	Date	Time	Notes	Assigned
	07/17/2000	11:35AM	LTC-Care Giver-L4784-Approved Attach File	DEMO
	07/19/2000	10:04AM	Call was scheduled on 07/19/2000 at 02:06PM (Active) - Follow up on "" for [Ackerman, Joseph] on "Defender", \$ 0	DEMO

- The **Object Description** window will open with the name of the selected contact automatically populated in the **Client Name** field.
- Click on the **File Name** button to search for the file to be attached to the SmartPad.

🔲 Object Descrij	ption	<
Client Name	Ackerman, Joseph	
File <u>N</u> ame		
Description 🗟		
Keywords		r.
- Object Type -		
Embedded	🔿 Link	
[	OK Cancel Help	

- Use the **Look in** drop-down to find the directory where the file is stored on your computer or network.
- Select **All Files(\*.\*)** in the **Files of Type** drop-down to view all files in the selected directory.
- When the desired file is visible, left click on the file to select it. The name of the file will be populated in the **File Name** field.

Open	? ×
Look in: 🔁 Reports 💽 🖛 🛍 📸	
jackerman asset allocation feb92004.pdf	2
	_
File name: jackerman asset allocation feb92004.pdf	en
Files of type: All Files(*.*)	ncel

- When you have selected the file, click the **Open** button.
- The path to the file will be populated in the **File Name** field and the **Description** field of the **Object Description** window.

🔲 Object Descri	ption	×					
Object Description Image: Client Name Ackerman, Joseph   File Name C:\Reports\jackerman asset allocation feb92004.pdf   Description C:\Reports\jackerman asset allocation feb92004.pdf   Keywords Image: Client Type   Image: Image							
File <u>N</u> ame	Client Name Ackerman, Joseph   File Name C:\Reports\jackerman asset allocation feb92004.pdf   Description C:\Reports\jackerman asset allocation feb92004.pdf   Ceywords Diject Type						
Description	C:\Reports\jackerman asset allocation feb92004.pdf						
Keywords		-					
- Object Type -		-					
Embedded	🔿 Link						
[	OK Cancel Help						

Note: Changes can be made to the entry in the **Description** field. Information entered in the **Description** field will appear in the **Notes** column of the SmartPad entry. No changes can be made to the entry in the **File Name** field.

🔲 Object Descrip	otion					
Client Name	Ackerman, Joseph					
Object Description   Client Name Ackerman, Joseph   File Name C:\Reports\jackerman asset allocation feb92004.pdf   Description Joseph Ackerman asset allocation feb92004.pdf   Keywords Object Type   © Embedded C Link						
Description	Joseph Ackerman asset allocation feb92004.pdf					
Keywords						
Object Type -						
Embedded	🔿 Link					
	OK Cancel Help					



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• If needed, add a keyword for the file in the Keyword field.

Object Descri	Ackerman, Joseph						
File <u>N</u> ame	C:\Reports\jackerman asset allocation feb92004.pdf						
Description	Joseph Ackerman asset allocation feb92004.pdf						
Keywords	Investment						
- Object Type -							
Embedded	🔘 Link						

- In the **Object Type** section of the **Object Description** window, you can choose to embed the selected file or create a link in the Smartpad to the location of the file in your computer or network.
  - Embedded File If you choose to embed the file, a copy of the selected file will be added to your CDS database. Note that the size of the file will be added to your CDS database. If the file is 755kb, your database will grow 755kb.
  - Linked File If you choose to create a link to the selected file, the file will need to remain in its original location. If the file is deleted or moved, the link will be broken and no users will have access to the file in CDS.
- After making selections in the **Object Description** window, click **OK**.
- A new entry will be added to the contact SmartPad reflecting the attached file.

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Date Time Notes									
	02/10/2004	04:48PM	Joseph Ackerman asset allocation feb92004.pdf						
	02/09/2004	04:53PM	Call was scheduled on 02/10/2004 at 04:46PM (Active) - Touch base on the possible creation of a trust for the children						

When you attach a file to the SmartPad of a contact, an entry will also be made in the contact's Image Log. You can open the Image Log of a contact by clicking on the **Images** button on the toolbar of the contact record.

CI	ient	Data Sys	tem - DE	EMO:D	EMO												
File	Edit	Record	View T	ools	Reports	Toolba	r Windo	w He	elp								
1 ?	×		🕼 🖉	<b>;</b>	I 🖬 ć	1 🗄	@ ~	-	+	<b>→</b> +	•	Î	3	11 🗐	i	RCM 🧲	s.
	ionta	ict - Dr. J	oseph M	I. Ack	erman (	50)											Images
Sur	nmary	l.	ŤF	Perso	nal		Add'l. F	ersona	al	Ĩ	Key R	elation	าร		Be	enefits	

The Image Log window will show an entry for all files attached to the SmartPad.

I	mage Log - Joe #	Ackerman (3)		_0	×
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	Date	Description	Keywords	File Extension	•
	02/11/2004	Joseph Ackerman asset allocation	Investment	pdf	
	01/05/2000	2nd Year Term Renewal Letter		JPG	
	12/15/1999	College Funding Letter		JPG	-
•				•	Γ

Just as in the SmartPad, double-clicking the entry in the summary spreadsheet will open the image. New images can be added to the Image Log using the **Add** button.