

Fast·Class File

Client Data System

Volume 109: 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.
- The **Document/Image Description** window will open with the name of the selected contact automatically populated in the **Client Name** field.

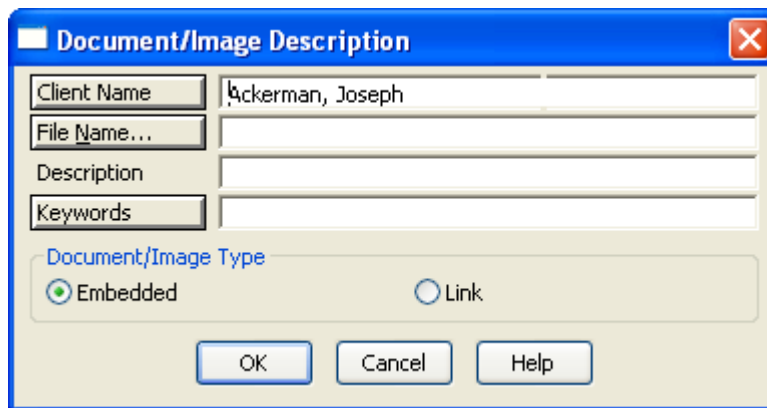


Figure 1: The Document/Image Description window

- Click on the **File Name** button to search for the file to be attached to the SmartPad.
- 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.
- When you have selected the file, click the **Select** button.
- The path to the file will be populated in the **File Name** field and the **Description** field of the **Document/Image Description** window.

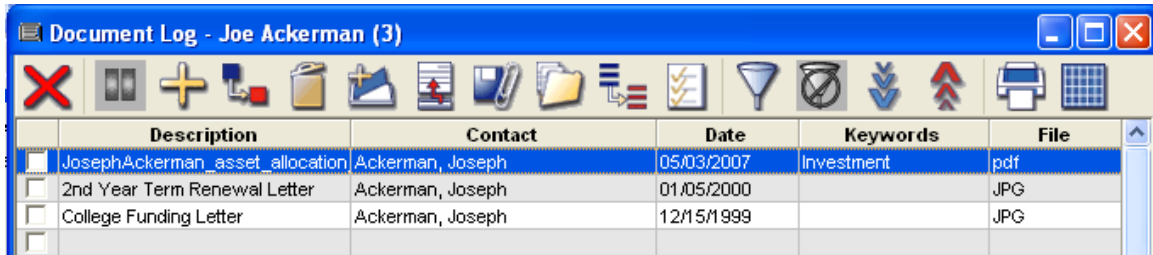
*Note: Changes can be made to the entry in the **Description** field. Information entered in the **Description** field will appear in the **Notes** column of the SmartPad entry. No changes can be made to the entry in the **File Name** field.*

- If needed, add a keyword for the file in the **Keyword** field.
- In the **Document/Image Type** section of the **Document/Image 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 **Document/Image Description** window, click **OK**.
- A new entry will be added to the contact SmartPad reflecting the attached file. 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.

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



	Description	Contact	Date	Keywords	File
<input type="checkbox"/>	JosephAckerman_asset_allocation	Ackerman, Joseph	05/03/2007	Investment	pdf
<input type="checkbox"/>	2nd Year Term Renewal Letter	Ackerman, Joseph	01/05/2000		JPG
<input type="checkbox"/>	College Funding Letter	Ackerman, Joseph	12/15/1999		JPG
<input type="checkbox"/>					

Figure 2: The Document/Image Log