Attached Documents

What is it...

- Allows you to attach any file to certain areas within Acclamare.
  - **Centralized access from your desk.**
  - **Reduce dependency on the dreaded 'file room'.**

- Add, View, and Delete attachments at ANY time.

- No restriction on the type of file. If Microsoft Windows can open it, then it can be attached.

- Choose existing file or scan on-the-fly.

Where can I use it...

- Initial Phase
  - **Customer Maintenance**
  - **Customer Payments**
  - **Customer Quotes**
  - **Item Maintenance**
  - **Vendor Maintenance**
  - **Vendor Invoice**

- Other areas of interest
  - **Sales Order**
  - **Shipping**
  - **PO Receiving**
  - **?????**

Possible uses...

- Vendor's invoice, packer, freight bill.
- Item drawings, revision history.
- Assembly instructions or video clip.
- Test reports and C of C's.
- Customer's PO (even email or fax).
- Image of customer's check.
- Customer sales tax certificate.
- Customer trade references.
- Pick ticket showing warehouse notations or customer signature.

- Whatever you need to retain or may need to refer to at a later date.

The tech side…

- The file you select to attach to stored in a folder used by Acclamare.
  - **Once the file has been attached, the original file can be moved or deleted without any impact on Acclamare.**

- Create a shared network folder.

- On workstation, select "File-> Machine Specific Options". The field "Document Folder" needs to be pointed to the shared folder.

The user side...

- Accessed from "File -> Attached Documents…" menu for the current record.

- New window appears allowing:
  - **View existing files.**
  - **Add new files (even edit data).**
  - **Delete files.**

- Add new files by:
  - **Standard Windows 'Open' interface.**
  - **Scan paper documents on-the-fly.**

Document scanners…

- Scanning is not controlled by Acclamare.

- Numerous scanners with their proprietary drivers and software available.

- Windows 7 has a built on scanner support and software (Windows Fax & Scan)

- Some scanner software provides customization features to make user experience a 'one button' process.

Document scanners…

- Scanner options run the gamut of price ranges.

- Attached Documents is 'per record' type of implementation. 'Desktop' scanners are more appropriate than 'high capacity/high speed' scanners.

- In this demonstration:
  - **Xerox Documate 152 (also branded as Visioneer Documare 152). $300-$360**
    - OneTouch software included.
    - PowerTools software included.

Tips...

- For a single record such as customer XYX, do not store files with the exact same name.

- Include the shared folder into your daily backup plan.