

Attach Any File or URL to Any Entity in Microsoft Dynamics® SL

Change Orders to Projects, Order Forms to Orders, Pictures to Inventory Items
 Simultaneously Index a File to Multiple Entities
 Eliminate Paper File Searches for Backup Documents

QUICKATTACH

QuickAttach allows an unlimited number of files to be attached to any entity (e.g. customer, project, order, etc.) in Microsoft Dynamics SL (Solomon). Eliminate searching paper files for backup documents, procedures, contracts, permits, rate schedules, and other critical information.

Spreadsheets, documents, pictures, and scanned images can be indexed by any standard or custom Solomon key field and retrieved from any Solomon screen. Even Internet URLs can be indexed and associated with Solomon records.

Users open documents with their preferred viewer because QuickAttach uses the Windows File Type association from the individual workstation.

Associate a single file to multiple entities simultaneously. For example, a permit might be associated with both a project and a customer.

QuickAttach is easy to configure. Once configured, QuickAttach automatically determines the types of entities (project, customer, inventory item, etc.) with which an attachment may be associated. Index key values are automatically extracted from the currently displayed screen.

Simply select a document, enter a description, and choose the entities to which it will be associated. The document is immediately available in all screens associated with the entity.

	Description	Document Type	File Type	Attached By	Date Attached	Sequence Number	Doc. N
1	San Francisco Scaffold Permit - Expires 10/15/2006	PERMIT	.JPG	SYSADMIN	3/20/2006	200	000000
2	Change Order 1 Specifications	CHGORD	.doc	SYSADMIN	3/20/2006	500	000000
3	Archon Change Order Procedures	CHGORD	.pdf	SYSADMIN	3/20/2006	500	000000
4	Change Order 1 Verbal Authorization	CHGORD	.wav	SYSADMIN	3/20/2006	500	000000
5	Budget Worksheet - Change Order 1	CHGORD	.xls	SYSADMIN	3/20/2006	500	000000
6	Sample Document - Marketing Literature		.pdf	SYSADMIN	1/31/2006	1000	000000
7	Price List		.pdf	SYSADMIN	1/31/2006	1000	000000
8	CNN.COM		URL	SYSADMIN	1/31/2006	1000	000000
9							
10							
11							

Easily Access Documents

QuickAttach allows all types of documents and files to be attached to any

Level: Project Project: EN123000

Attachments Add Attachment

Description: San Francisco Scaffold Permit - Expires 10/15/2006

Document Type: PERMIT Permits and Related Documents

Sequence: 200

URL/File Name: C:\PROGRAM FILES\SOLOMON\VSBS\QAT\SFOSCAFFOLD.JPG Browse...

Associate With:

Customer: C300

Project: EN123000

Add Add Another Add and Close

Adding Document Attachments is Easy
 Select a file or URL, classify and describe the contents, and check the entities to which it should be associated.

QUICKATTACH

Configuring Document Attachment

Implementation of QuickAttach is a snap. Simply define the attachment types and associate attachment types with screens.

Attachment Types

Configure Attachment Types to specify available indexing entities.

Name	Type	Length
Project	Upper Case	16
Task	Upper Case	32

Attachment Type	Key 1 Source	Key 2 Source	Key 3 Source
CUSTOMER	ocustomer		
PROJECT	cproject		
TASK	cproject	cpjt_entity	

Screen Interface

Specify the Attachment Types associated with a screen and the source of the index values.

About Silver Brook Systems

Silver Brook Systems is a Microsoft Certified Partner with ISV and Business Solution competencies. Our goal is extend the capabilities of Microsoft Dynamics SL with applications providing superior functionality.

Silver Brook Systems is intimately familiar with Microsoft Dynamics SL (Solomon) and its vast potential. A long history of system design and software development and more than 10 years experience with development specifically for Solomon enables us to provide efficient solutions to enhance the value of Microsoft Dynamics SL.

SILVER BROOK SYSTEMS

Technical Specifications

Product Type

VB Tools Application
Customization Manager enabled

Technical Requirements

Standard Dynamics SL environment
Customization Manager

Supported Versions

Microsoft Dynamics SL 2011 FP1,
Microsoft Dynamics SL 2011

Available Versions*

Solomon 5.5 and later

*may not include all features listed in product data sheet

800-633-3013
www.silverbrook.com
Tel: 203-454-0237
Fax: 203-221-5810

Silver Brook Systems, Inc.
191 Post Road West
Westport, CT 06880

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