SERVICELINK DIRECT – ATTACHMENTS

OVERVIEW

The Attachments facility allows links to be set up between ServiceLink job records , customer records , contract records and product records and other data within the users computer network. This allows documents associated with a job , or a contract to be readily viewed from within ServiceLink.

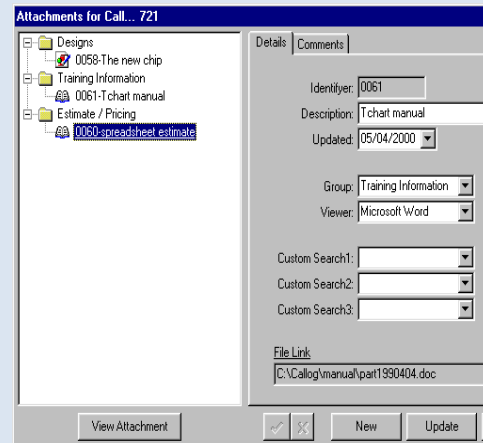This function is similar to having an attachment to an e-mail.

SCOPE

Links can be established between any mix of

1. Jobs
2. Products
3. Contracts
4. Customers
5. Assets

And

1. Word Processing documents
2. Spreadsheets
3. Scanned Images
4. Videos
5. Pictures

ACCESS

The method of operation of attachments is straightforward. To access attachments for a call, the "attachments" button is used . This then displays the list of attachments, click on the choice and the attachment is displayed , as illustrated on this page.

USES

Examples of attachments include easy access to

1. The job estimate held in a spreadsheet
2. A WP document such as the quote for the job
3. A WP document with the contract details
4. Health & Safety information for a particular product
5. Scanned correspondence from a customer
6. A map of how to get to a site
7. A photograph of the site or installation.