

# THE DOCUMENT MANAGER

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## OVERVIEW

The document manager is used to store communications you have concerning a staff member, client, supplier or product. There are six types of default communication types available with a seventh option that allows you to link to any type of electronic document on your computer that has software installed to read it.

### Communication Types

<b>A: All</b>	Displays all communications that have been entered for this record.
<b>N: Note</b>	Displays all of the notes that have been entered for this record.
<b>P: Phone</b>	Displays all of the phone calls that have been manually entered for this record.
<b>L: Letter</b>	Displays all of the letters that have been entered for this record. You can set up letter templates for letters that are sent out frequently.
<b>E: Email</b>	Displays all of the emails that have been sent for this record.
<b>C: SMS</b>	Displays all of the SMS messages that have been sent for this record from within Hairlink <sup>SQL</sup> .
<b>Z: Other</b>	Allows you to add other types of documents that are stored on your computer. The only prerequisite for viewing these documents is that you have an application installed on your computer that can open them.

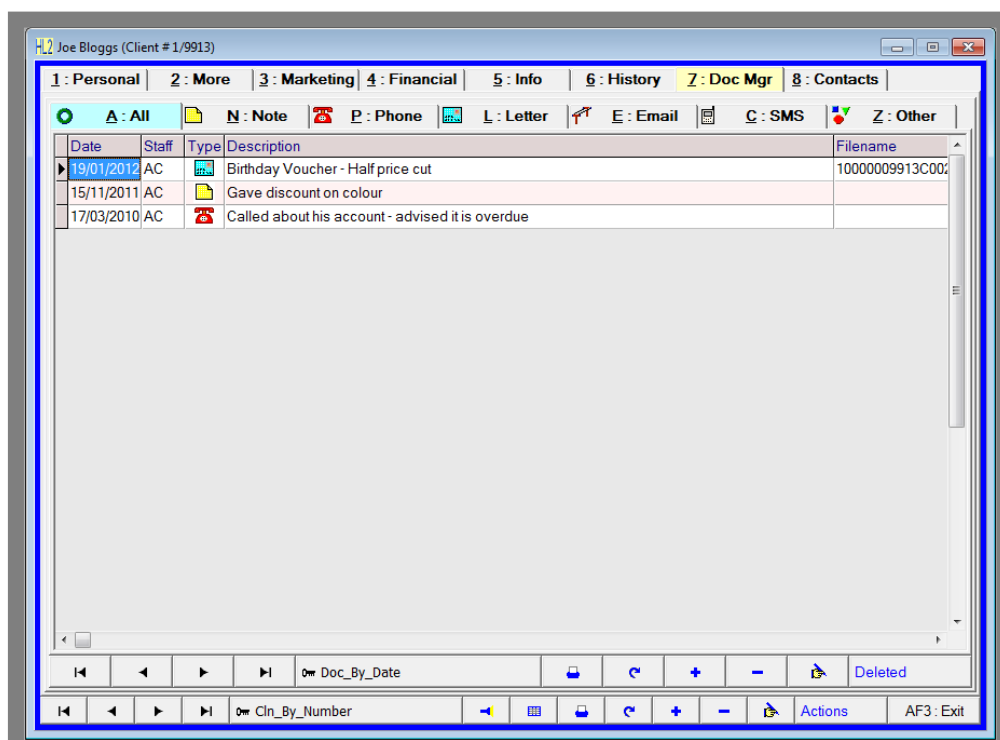


Fig. 14 - 1

# HOW TO ADD NEW DOCUMENTS

## Adding a Note / SMS or Phone Message

The process for adding a note, SMS or phone message is the same in all document manager sections in Hairlink<sup>SQL</sup>.

1. Click on the **'Staff'**, **'Client'**, **'Supplier'** or **'Product'** button.
2. Search for the record that you wish to add communications to.
3. From the record you have just opened, click on the **'Doc Mgr'** tab.
4. Click on either the **'Note'**, **'Phone'**, or **'SMS'** tab depending on the type of communication you are adding.
5. Click on the plus button on the document manager tool bar. Don't click on the plus button on the very bottom toolbar, this is for adding a new client.
6. A phone, note or SMS form will open up.
7. Enter your staff ID in the **'Select Your ID'** field.
8. Enter in the contents of your message and when finished click on the **'Save'** button. If you have created an SMS message and have purchased the SMS module, a text message will be sent to the client.

The screenshot shows a software window titled "Bloggs Joe (Client # 1/6780)". At the top, there are tabs labeled "1 : Personal", "2 : More", "3 : Marketing", "4 : Financial", "5 : Info", "6 : History", "7 : Doc Mgr", and "8 : Contacts". The "7 : Doc Mgr" tab is active. Below the tabs, there are two dropdown menus: "Type of Communication" set to "Phone" and "Date" set to "17/03/2010". Below these is another dropdown menu labeled "Select Your ID" with the value "AP". A large text area is labeled "Enter Note / Message" and contains the text "Called about his account - advised it is overdue". At the bottom of the form area, there are two buttons: "Save" with a green checkmark icon and "Cancel" with a red X icon. At the very bottom of the window, there is a toolbar with various navigation icons, a field labeled "Cln\_By\_Number", and buttons for "Actions" and "AF3 : Exit".

Fig. 14 - 2

## Adding a New Letter

1. Click on the **'Staff'**, **'Client'**, **'Supplier'** or **'Product'** button.
2. Search for the record that you wish to add communications to.
3. From the record you have just opened, click on the **'Doc Mgr'** tab.
4. Click on the **'Letters'** tab.
5. Click on the **'+'** button on the document manager tool bar. Don't click on the plus button on the very bottom toolbar, this is for adding a new client.

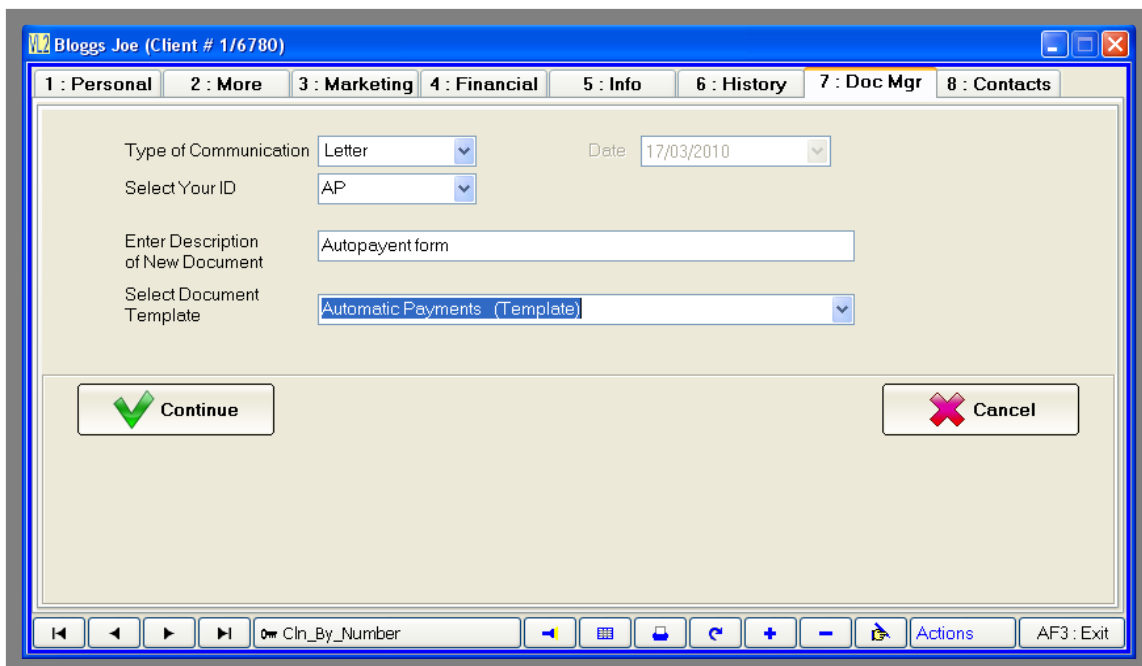


Fig. 14 - 3

6. Enter your staff ID in the **'Select Your ID'** field.
7. Enter a description of the letter.
8. Select the template you wish to use for this document. If you wish to start from a blank document choose **'Word Document (Not Mailmerged, Blank)'** or **'Mailmerged Document (Blank)'** for the template.
9. Click on **'Continue'** and the word processor will open the document.
10. You can now edit the document. Once you are finished click on the **'Save'** button (the save button is a disk icon which is found in the top left corner of the word processor).

## How to Create Letter Templates

Hairlink<sup>SQL</sup> allows you to create templates for documents that are used frequently in the system. You can also add mail merge variables to these documents for the quick and easy creation of letters.

1. Click on the **'Options'** menu and then on **'Pick Lists Setup'**.
2. Depending on where you want to add the letter template click on the client, staff, product, or supplier option.
3. Double click on **'Letter Templates'**.
4. A new form will open listing all the templates currently in your system.
5. To add a new form, click on the plus button in the bottom left hand corner.
6. Enter a template name and click **'OK'**.
7. The word processor will now open for you to create the letter.



**TIP:** You can add mailmerge variables to the letter by clicking on the **'Insert Merge Field'** button. This is useful for generic letters where you wish to show client or product specific details. For example, a letter can have mail merge variables of the first and last name of the client. When the letter is merged and printed the client's name from the client record you are looking at will be merged into the letter in place of the mail merge variables.

8. Once you are happy with your template you can save the letter and exit from the template editor and pick lists setup.
9. Your template should now be available in the document manager.

## Sending a New Email

1. Click on the **'Staff'**, **'Client'**, **'Supplier'** or **'Product'** button.
2. Search for the record that you wish to add communications to.
3. From the record you have just opened, click on the **'Doc Mgr'** tab.
4. Click on the **'Email'** tab.
5. Click on the **'+'** button on the document manager tool bar. Don't click on the plus button on the very bottom toolbar, this is for adding a new client.

The screenshot shows a software window titled "Bloggs Joe (Client # 1/6780)". At the top, there are tabs labeled "1 : Personal", "2 : More", "3 : Marketing", "4 : Financial", "5 : Info", "6 : History", "7 : Doc Mgr", and "8 : Contacts". The "7 : Doc Mgr" tab is active. Below the tabs is a form for sending an email. The form contains the following fields and controls:

- "Type of Communication": A dropdown menu set to "Email".
- "Date": A date picker set to "17/03/2010".
- "Select Your ID": A dropdown menu set to "AP".
- "Enter Subject of New E-mail": A text input field containing "Drenches in Stock".
- "Select E-mail Type": A dropdown menu set to "Enhanced (HTML)".

At the bottom of the form area, there are two buttons: "Continue" (with a green checkmark icon) and "Cancel" (with a red X icon). Below the form area is a toolbar with various icons, including a plus sign, and the text "Actions" and "AF3 : Exit".

Fig. 14 - 4

6. Enter your staff ID in the **'Select Your ID'** field.
7. Enter the subject of the email.
8. Select the type email you wish to send. You can choose either **'Enhanced (HTML)'** or **'Plain'**. An enhanced HTML email allows you to create a formatted email with pictures, logos etc..., a plain email allows you to create a simple text email.
9. Click on **'Continue'** and the email word processor will open.
10. You can now edit the document.
11. Once you are finished click on the **'Send'** button.

## How to Link Other Types of Files to Document Manager

Hairlink<sup>SQL</sup> also allows you to link to most types of documents that are already saved on your computer and you can open them directly from Hairlink<sup>SQL</sup> as long as you already have software installed that can open these documents.

For example, you may have a letter a client has emailed to you as an attachment that you want to keep on file. This letter can be saved in the Document Manager, and can be in any format that can be opened directly from Windows Explorer. Double-clicking on the document once it is in document manager will open the program associated with that particular file to view it. (eg Word for doc files, Excel for .xls files). You can save these electronic documents against “Client”, “Product”, “Supplier” and “Staff” records.

1. Click on the ‘**Staff**’, ‘**Client**’, ‘**Supplier**’ or ‘**Product**’ button.
2. Search for the record that you wish to add communications to.
3. From the record you have just opened, click on the ‘**Doc Mgr**’ tab.
4. Click on the ‘**Other**’ tab.
5. Click on the ‘**+**’ button on the document manager tool bar. Don’t click on the plus button on the very bottom toolbar, this is for adding a new client.
6. A new form will open.
7. Enter your staff ID in the ‘**Select Your ID**’ field.
8. Enter a description of the document and click the ‘**Continue**’ button.
9. A windows ‘**Open File**’ form will now appear. Browse through your documents and select the file you wish to link to Hairlink<sup>SQL</sup>.
10. The document should now be linked to Hairlink<sup>SQL</sup> and when you double click it, it should open with the appropriate program that is already installed on your computer.



**NOTE:** These files are not backed up by the Hairlink backup utility. You must backup these files yourself.

## How to View Existing Communications

1. Click on the **'Staff'**, **'Client'**, **'Supplier'** or **'Product'** button.
2. Search for the record that you wish to add communications to.
3. From the record you have just opened, click on the **'Doc Mgr'** tab.
4. Select the type of document you would like to view for the staff, client, supplier or product.
5. To view any of the communications listed simply double click on one of them.

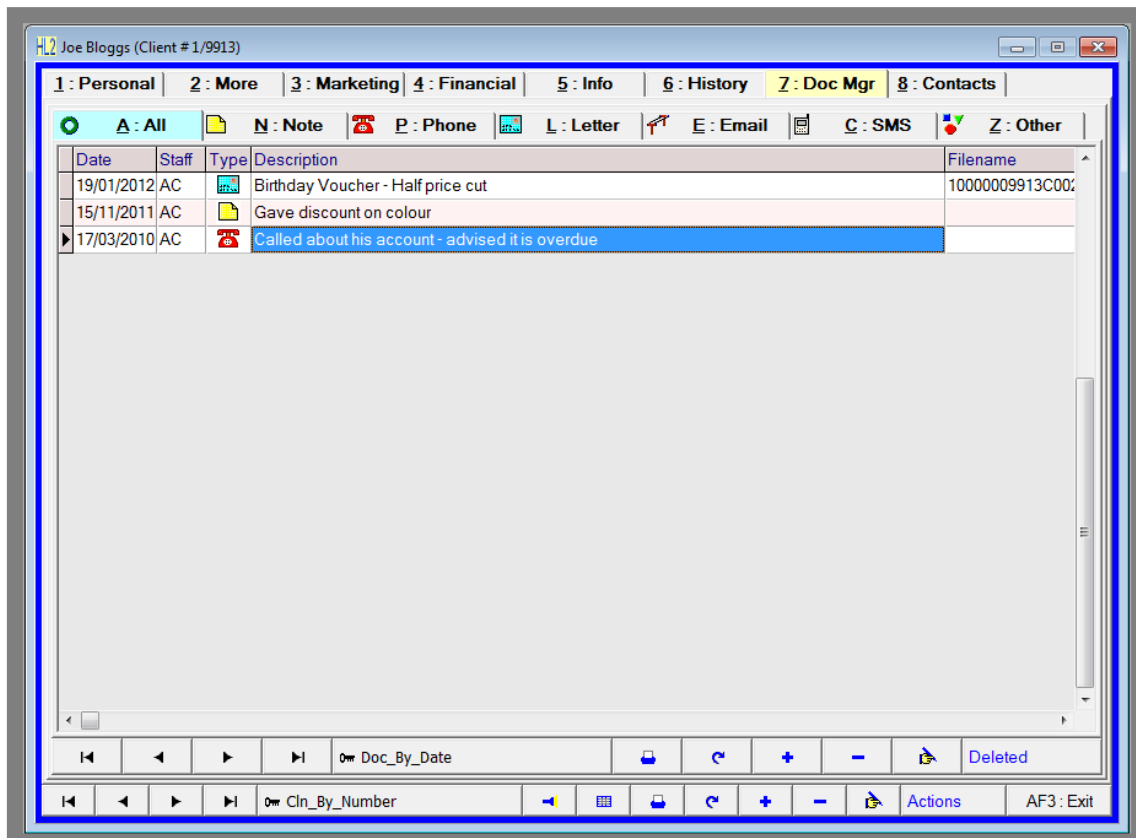


Fig. 14 - 5