

Storing Files Relating to a Person

A JOBZ! user asks:

"I have an ongoing need that I'm curious if JOBZ has this ability. On occasion, we receive a price list, equipment list or company catalog from a prospect or vendor. I'd like to connect this info (pdf/jpeg) to their contact record in JOBZ, does this feature exist?"

Try this: Create a New Memo to a person, either from their ADDRESS Input screen Memos tab, or by creating a New Memo from the NEW pull-down and specifying them as the contact. Either of these methods will link the Memo to that person. If you begin the New Memo process from within a job, it will also be linked to that job. Any Memos that are linked to the person will be listed by Subject on the Memos tab of the ADDRESS input screen.

Note the Graphic tab on the Memo input screen. Simply drag a jpeg, png or PDF into the field on that tab. It will be stored there (actually, it will be stored on the server without taking up space in the database itself).

It can be viewed there, or if you right-click, you can then Export the file to a location of your choosing.

Go To

= 1 / 56 =

<< < > >>

Organize

New

Actions

Output

Find...

HELP

Memo

7307

Sp ✓

Date

8/1/16

From

Jim Taylor

Southern California

Follow Up

Representing

Carpe Data

To

To Same Contact

Same Job

Same Job #

Book

Company

11 by Seventeen

Phone

408-666-7356

Name

Mr. Al Gorithm

Fax

Email TO:

support@carpedata.com

Address

5563 Calle Ocho

Email CC:

City/ST/Zip

Carpinteria CA 93013

36805

Re

Storing Files Relating to a Person

Word Count

203

Job#

Sal.

Dear

Signoff

Always At Your Service,

Title

Developer of JOBZ!

Dear Al,

Dear Mr. Gorithm,

PS:

Text

Preview

Private

Plan

Xmittal

Templates

Invoice

Graphic

Right Click or Drag to Insert Graphic. Choose a Document from the Output Menu that is "Illustrated."

Half Fold

Tri Fold

Z Fold

Parallel Fold

Single Open Gate Fold

Double Gate Fold

Roll Fold (4 Panel)

Accordion Fold (4 Panel)

Half Then Half Fold

Half then Tri Fold

Cut

Copy

Paste

Insert Picture...

Insert File...

Export Field Contents...

Uniform Text

Also note that text entered on the Private tab will be displayed off to the right of the Text field and will not print out on any of the documents.