

## Attaching Documents to a Contact Report

Once you create and save a new contact report, the attachment section appears at the bottom of the screen. HOWEVER you will not have the option of attaching a document here. You must exit this screen and then re-open the contact report to have the capability of attaching documents. (This is a current limitation in Advance and will be fixed with a future system upgrade.)

The screenshot displays the 'Contact Report' interface for Wile E. Coyote, Ph.D. #965440. The report was created on Sep 19, 2013, via a 'Phone Call' with the purpose of 'Info Gathering'. The author is Ms. Jeanne M. Cassady, and the report is associated with the College of Engineering (COE). The description provides details of a phone call discussing anvil research. The 'Attachments' section at the bottom shows a table with columns for 'View', 'Doc Type', and 'Description', but it is currently empty. A context menu is visible over the 'Attachments' table with options: 'Sort', 'Export Form', and 'Print Form'.

View	Doc Type	Description

Next step to attach a document would be:

1. Open up the Entity Overview screen for this entity (easily done here by clicking on the blue entity name hyperlink at the top of the contact report).
2. Scroll down in the Entity Overview to the Contact Report list for Entity
3. Click on the ellipsis (...) icon to open the contact report that you would like to update.

Entity Overview

Wile E. Coyote, Ph.D. #965440  
 Rec Type Faculty  
 Degree

Relationship Mgr: Overall Stage:

Contact Information  
 Home (Preferred)  
 131313 Warner Street  
 Burbank, CA 91518

Google Map

Assigned To	Office	Assignment Type	Active

Prospect Summary (0)

Contact Report List For Entity (1/1)

Report #	Contact	Purpose	Date	Author
235406	Phone Call	Info Gathering	09/19/2013	Ms. Jeanne M. Cassa...



This will now allow you to click on Actions, then “New Doc” to attach the document.

The screenshot shows a web application interface for a 'Contact Report'. The top navigation bar includes 'Home', 'Addresses', 'Contact Report', 'Entity Overview', and 'Contact Report'. The main content area displays the details for 'Wile E. Coyote, Ph.D. #965440', including 'Contact Type' (Phone Call), 'Contact Purpose' (Info Gathering), and 'Author' (Ms. Jeanne M. Cassady). The 'Description' field contains text about a phone call to discuss COE research. Below the form is an 'Attachments (0)' table with a 'New Doc' option highlighted in the 'Actions' menu.

Browse to the document that you would like to attach

The 'New Attachment' dialog box has a title bar with 'New Attachment' and a 'Close' button. Below the title bar, there is a text input field and a 'Browse...' button. The instructions state: 'Place a file on the Attachments list by entering the filename, including path, or pressing the Browse button to locate the file.' Below the input field, there is an 'Attach File' button. The instructions also state: 'Click on Attach File to add the file to the Attachments List.' and 'Choose close to take no action.'

Once attached, the document will appear in the attachment section.

<b>Who?*</b> <b>What?*</b> <b>Where?*</b> <b>When?*</b>	Called Wile E to discuss the latest and greatest Anvil research information. He is highly interested in the physics of throwing anvils off of steep cliffs.
<b>MG Qualified?</b>	QU <input type="button" value="v"/> Qualified my unit
<b>Proposal ID</b>	<input type="text"/> <input type="button" value="v"/>
<b>Prospect ID</b>	<input type="text"/> <input type="button" value="v"/>
<b>Ask Amount</b>	<input type="text"/>
<b>Name*</b>	<input type="text" value="Wile E. Coyote, Ph.D."/>
<b>Initiated By</b>	<input type="text"/> <input type="button" value="v"/>
	<b>Result of Ask</b> <input type="text"/> <input type="button" value="v"/>
	<b>Sort Name*</b> <input type="text" value="COYOTE,WILE,E"/>
	<b>Report ID</b> 235406

Attachments (1/1)			
View	Doc Type	Description	Modified
	DOCX	1a test doc.docx	09/19/2013