

# Facilities Available During the Work

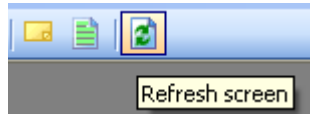
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*Describes several facilities available to the Smart Flow users during their work, such as the screen-refresh button, the copy-paste functionality, the dragging and dropping of objects and the document creation facilities*

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## The Screen-Refresh Button

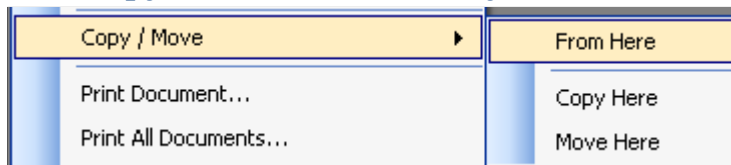


*Smart Flow* is a multi-user system. It is possible that the data displayed on the screen is not the most current. Any other user could have changed it, or could have appended or deleted some records.

In such a case it is not needed to close and reopen the currently active screen or the entire application, in order to refresh the data displayed on the screen. *Smart Flow* provides a screen-refresh button on the toolbar. The same functionality has the functional key *F5*, and the menu *Window / Refresh Active Screen* on the main screen.

When you press the screen-refresh button on the toolbar or the functional key *F5*, the data displayed on the currently active screen will be refreshed and will reflect the most current changes made to the *Smart Flow* database records.

## The Copy-Paste Functionality

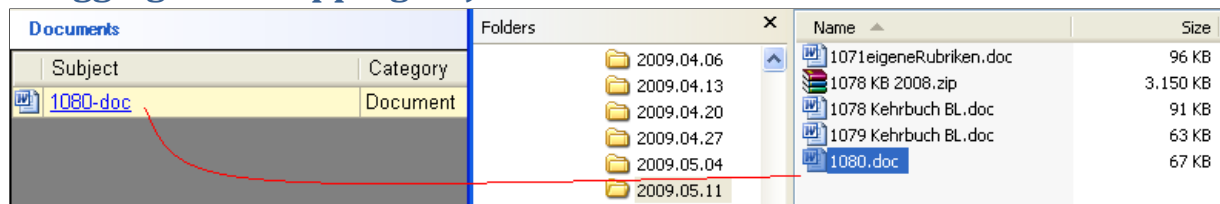


Almost any object of *Smart Flow* (work process, contact, appointment, document, etc.) could be copied or moved from one screen to another. To copy or move an object right click on the object and from the context menu select *Copy Move / From Here*. **The name of the copied object will be shown on the status bar of *Smart Flow* - look at the bottom right part of the *Smart Flow* main screen.**

To paste the copied object into another screen (or to create the needed relation between the copied object and the selected object on another screen), right click on the target panel or object and from the context menu select *Copy Move / Copy Here*. The object from the clipboard will be copied to the new location, or the needed relation between the copied object and the selected object on the target panel will be created.

To move the copied object to another screen (or to create the needed relation between the copied object and the selected object on another screen), right click on the target panel or object and from the context menu select *Copy Move / Move Here*. The object from the clipboard will be moved to the new location (if possible), or the needed relation between the copied object and the selected object on the target panel will be created.

## Dragging and Dropping Objects

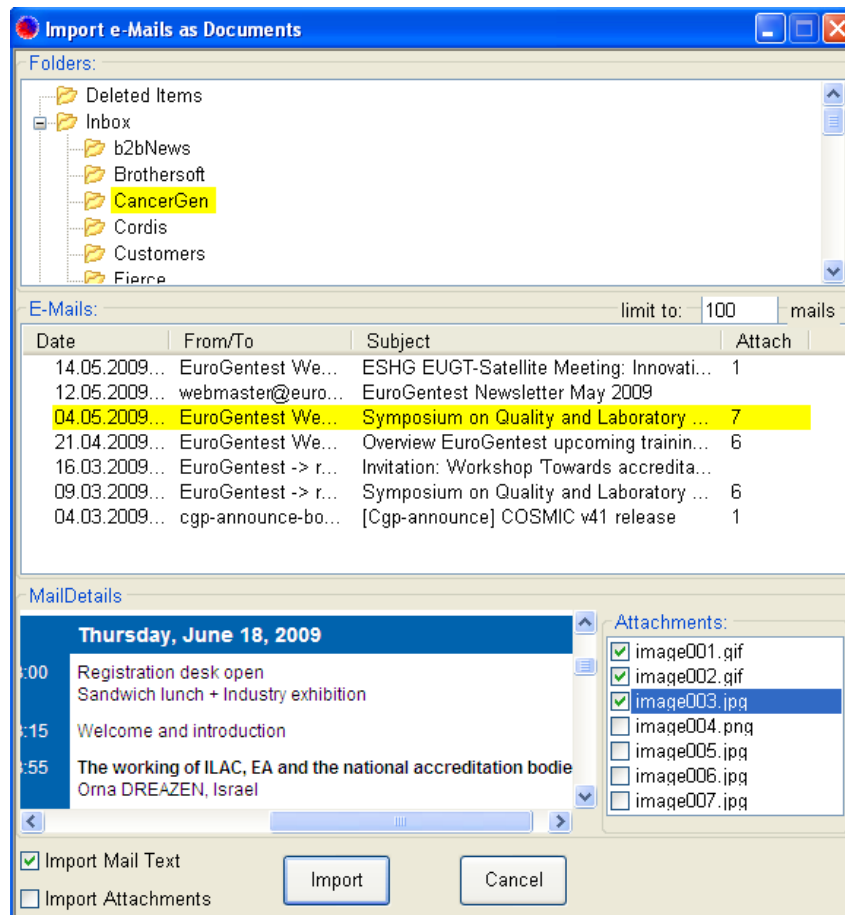


Although it is not quite clear at the first sight, it is possible to drag almost any object (work process, contact, appointment, document, etc.) from one screen and drop it into another screen or onto another object. This is similar to copying and pasting of objects and is a useful and convenient way to copy or move objects or to create the needed relations between the objects.

Pay attention also to the facility to drag file(s) from the *Windows Explorer* and drop them into the *Documents* panel. This action will import the dragged files as *Smart Flow* documents with the same subjects as the names of the dragged files. If the files are dragged as shortcuts, the corresponding *Smart Flow* documents will be created only as hyper-links to the actual files. If such "linked" files need to be accessed by multiple users, they need to be placed **in advance** on a shared file server.

## Importing e-Mails as Documents

You can import the text or attachments of an existing e-mail from *MS Outlook* into *Smart Flow* documents. To do this, right click on the *Documents* panel and select *Import e-Mails as Documents* from the context menu. The dialog *Import e-Mails as Documents* will show up.



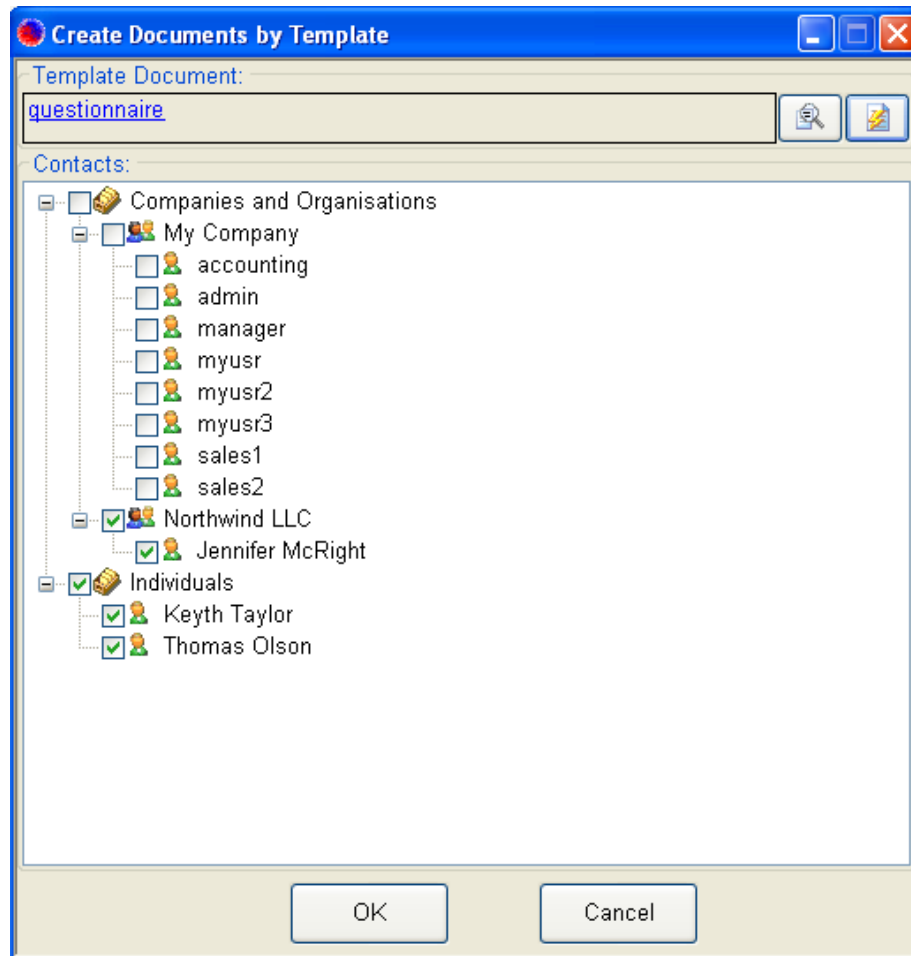
Select the needed e-mail folder and then from the list of e-mails select the e-mail you'd like to import. Mark the *Import Mail Text* check-box, if you'd like to import the e-mail text as a document. Mark the *Import Attachments* check box, if you'd like to import all existing file attachments as separate documents. Alternatively, unmark the *Import Attachments* check box and mark only the attachments you'd like to import. Finally press the button *Import*. The selected documents will be imported and added to the *Documents* panel.

Documents							
	Subject	Category	Contact	Mark	Out	Modified	Added
	<a href="#">Symposium on Quality and Laboratory Management - Deadline for registration June 1, 2009</a>	Mail/Fax		<input type="checkbox"/>	<input type="checkbox"/>	19.05.2009	19.05.2009
	<a href="#">image001.gif</a>	Mail/Fax		<input type="checkbox"/>	<input type="checkbox"/>	19.05.2009	19.05.2009
	<a href="#">image002.gif</a>	Mail/Fax		<input type="checkbox"/>	<input type="checkbox"/>	19.05.2009	19.05.2009
	<a href="#">image003.jpg</a>	Mail/Fax		<input type="checkbox"/>	<input type="checkbox"/>	19.05.2009	19.05.2009

## Creating Documents in a Batch

You can create multiple contact-related documents in a batch, by using a template. This simplifies and facilitates the way to create multiple documents for different contacts based on one template document.





To do this, press the *By Template* button located on the right of the *Documents* panel, or right click on the *Documents* panel and select *Create Documents by Template* from the context menu. The dialog *Create Documents by Template* will show up.



Select the template document by using the buttons on the right of the *Template Document* field. The first button allows you to select an existing document from a work process or category. The second button allows you to select a template document from the list of the available template documents.

Then, on the tree of available contacts mark the contacts, for which you'd like to create documents based on the selected template document. If you mark a contact containing other contacts, such as a contact corresponding to a company or organization, all subordinate contacts will be also marked. Finally press the button *OK*.

The documents corresponding to all marked contacts will be created, filled-in with the appropriate data and added to the *Documents* panel.

Documents							
	Subject	Category	Contact	Mark	Out	Modified	Added
	<a href="#">questionnaire - Northwind LLC</a>	Document	<a href="#">Northwind LLC</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20.05.2009	20.05.2009
	<a href="#">questionnaire - Jennifer McRight (Northwind LLC)</a>	Document	<a href="#">Jennifer McRight</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20.05.2009	20.05.2009
	<a href="#">questionnaire - Keyth Taylor</a>	Document	<a href="#">Keyth Taylor</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20.05.2009	20.05.2009
	<a href="#">questionnaire - Thomas Olson</a>	Document	<a href="#">Thomas Olson</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20.05.2009	20.05.2009