

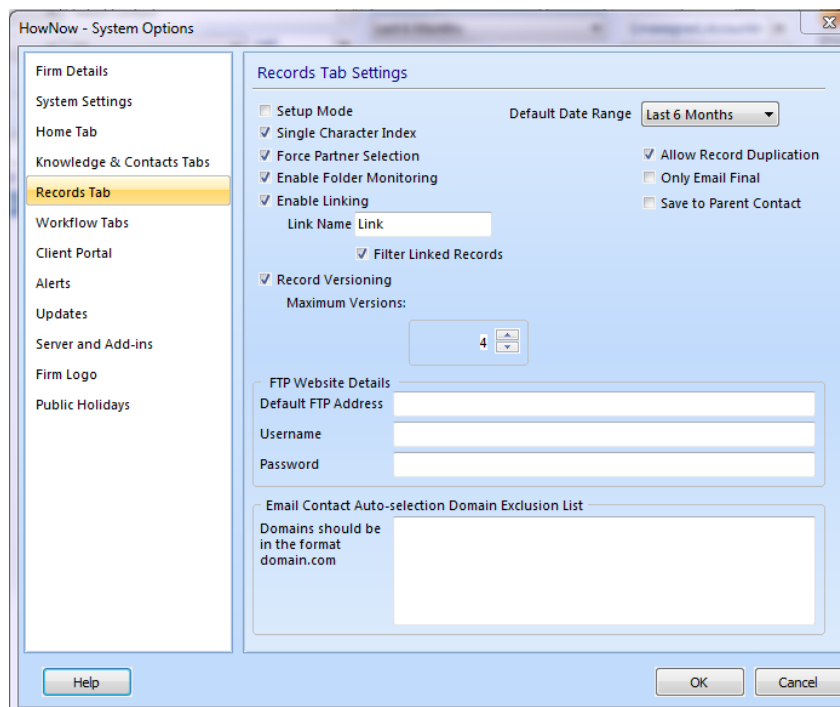
Fact Sheet - Record Linking

The Record linking system allows related records to be linked together via a link code

System Setting

The Linking function can be switched on by checking the Enable Linking checkbox in the Settings tab of System Options.

The default field name 'Link' can be changed if required by editing the Link Name field.

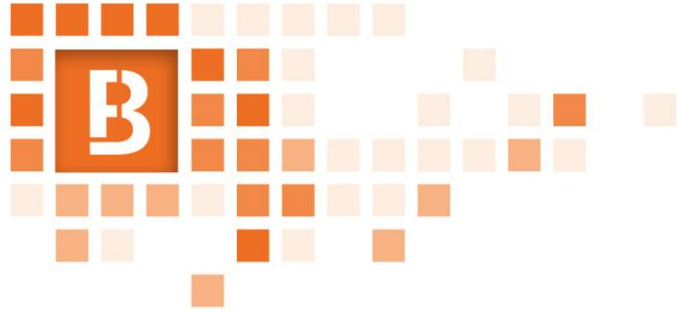


Filter Linked Records: Forces HowNow to apply all filters to linked records. The default (off) is to not filter linked records except for the contact filter.

Link Code Properties

A link code can be a string of up to 12 alphanumeric characters. Typically it would be a job number or a combination of the client code and a date. HowNow will automatically create a numeric code if none is supplied.





How it Works

Adding a Link Code to Records

Whenever a record is created, a link field allows a link code to be entered or, a browse button can be clicked to display a records search list to allow an associated record to be selected.

A selected range of records in the search results can be linked by right-clicking the selected records and choosing Link... The Record Links dialog will be displayed. If one or more of the selected records has a link code, this will appear in the link code field. Click OK to link the selected records.

Removing a Link Code from Records

Linking can be removed from a record either by right-clicking the selected record and choosing the Link... option and clearing the link code or by editing the profile of a linked record and clearing the link code.

Linking can also be removed from a range of records by selecting them and choosing the Link... option from the right-click menu. Clear the link code field and click OK. The link code will be removed from the selected records.

Filtering Features

Highlighting a record will display its related records in a box at the bottom of the search results list.

Filter on Linked Record Selected: The right click menu "Filter on this Link" can be applied.

MailScan Features

MailScan Feature: When adding documents into HowNow via our MailScan Module, the original document and the letter created automatically have the linking assigned to the documents based on the record number generated.

No...	Title	Status	Key...	Link	Job	Contact Co...	Contact	Modified
	ITA Statement of Account	Final		0010962		Client02	John Black Pty Ltd	18/11/2011
	ITA Statement of Account	Final		0010964		Client22	Johns & Black Pty Ltd	18/11/2011

"ITA Statement of Account" has 1 related record								
No...	Title	Status	Key...	Link	Job	Contact Co...	Contact	Modified
	Statement of Tax Account - ... Mail In			0010962		Client02	John Black Pty Ltd	18/11/2011

2 items found in 0.08 seconds

