



Opmetrix Quicklinks Feature

Quick Reference Guide

Opmetrix Version 4.7 onwards

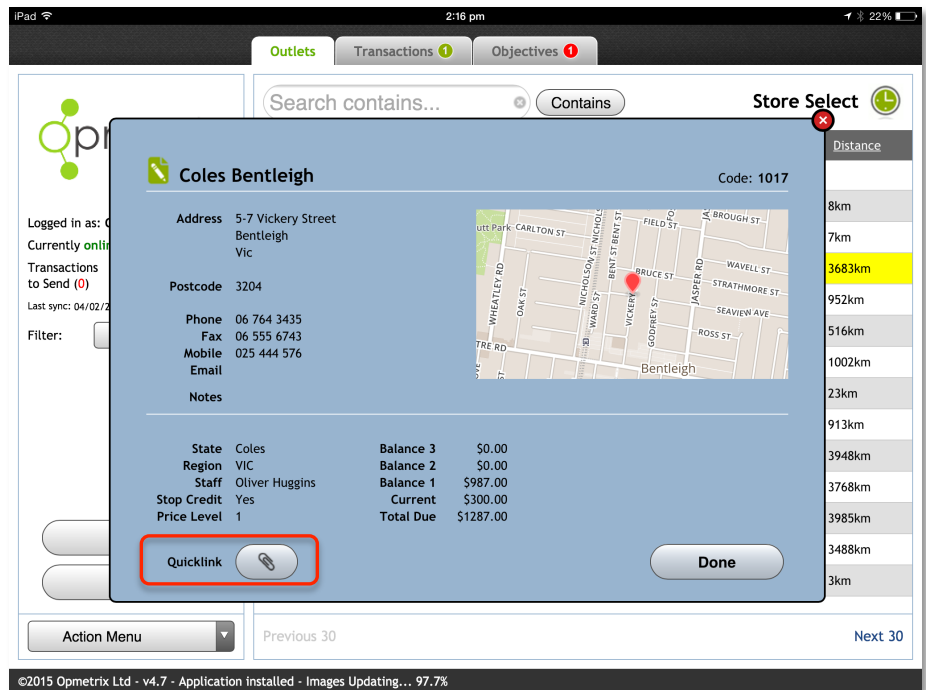
Introduction3

Product & Customer Quicklink Maintenance5

Company Quicklink Maintenance6

Using Quicklinks in the field.....7

Introduction



Quicklinks is a feature that allows Web URL links to be attached to products and customers.

Web links could point to customer websites, documents, PDF Flyers or even Excel spread sheets, making it a handy way for field users to quickly access relevant external information from within the Opmatrix App. *Some Quicklink suggestions:*

- Link a PDF product sheet to a product/SKU
- Link a customers website to a customer
- Link an Excel price list to a customer

There are three areas Quicklinks can be used

1. Customers

You can set a Quicklink for each customer

2. Products

You can set a Quicklink for each product

3. Company

One default company Quicklink can be set. The company Quicklink can be accessed anytime within the Opmetrix app and is often used to point to a folder containing multiple documents or further folders that are common to all users.

Using Quicklinks to access documents



Quicklinks link to website URLs, not directly to a document. Many online storage services such as DropBox, Box, SharePoint, and Google Drive allow documents to be accessed from these locations via URL. Therefore to utilise documents with Quicklinks you must have access to one of these storage services.

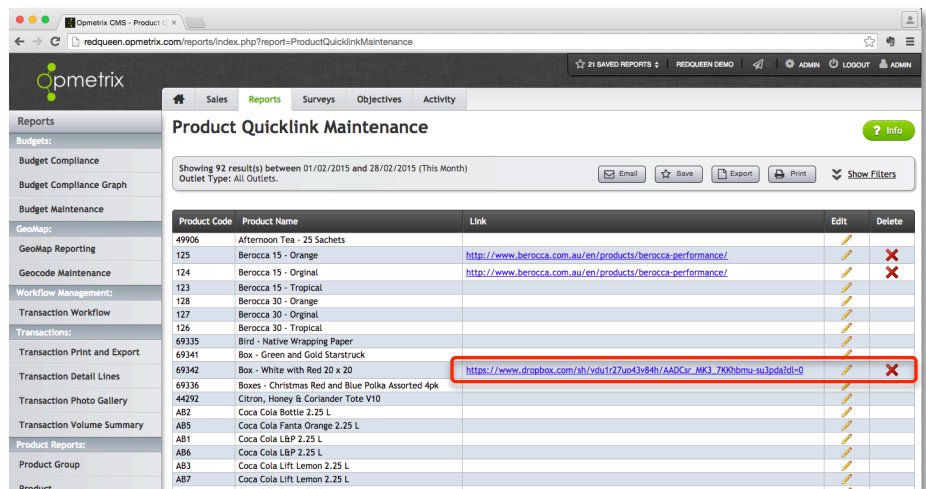
Many systems like DropBox offer a free service with plenty of capacity for the average company.

This document discusses the use of Quicklinks only. For information on file storage services you should access their own websites.

Product & Customer Quicklink Maintenance

Quicklink Maintenance is available in Opmetrix CMS on the **Report Tab** for users with **Admin, Executive or Supervisor** access.

There is an option for Product Quicklinks and Customer Quicklinks. Both maintenance screens operate in the same way.



The main screen functionality is as follows:

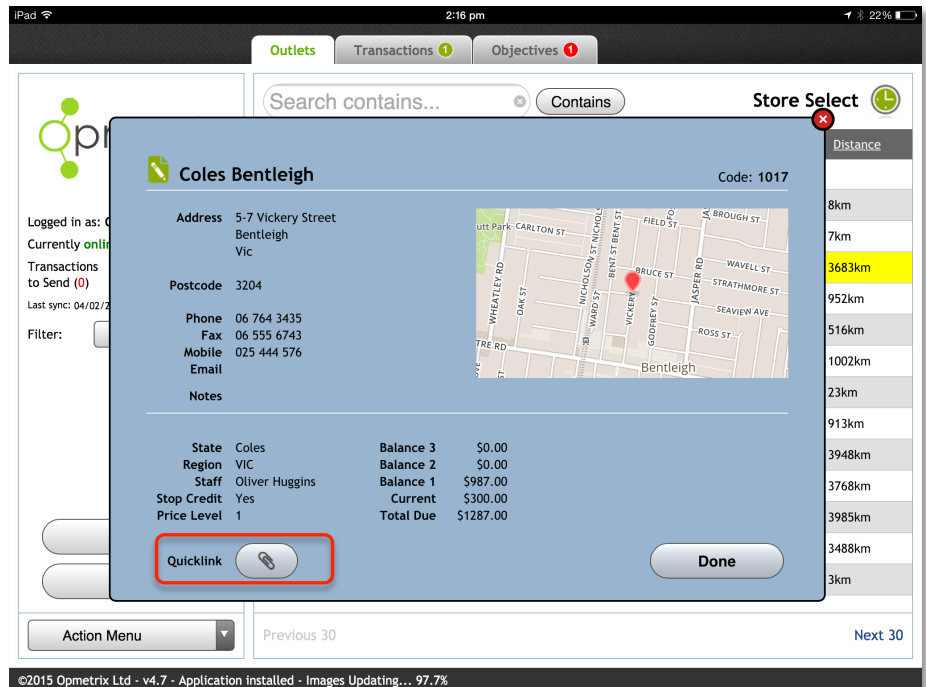
Edit	Opens the edit box and allows a Web URL to be linked
Delete	Removes an existing link for a product or customer
Show Filters	Filter the product or customer list to find the products or customers you wish to maintain

Company Quicklink Maintenance

One default company Quicklink can be set. The company Quicklink can be accessed anytime within the Opmetrix app and is often used to point to a folder containing multiple documents or further folders that are common to all users.

The company Quicklink is configured in the Opmetrix system settings. We recommend contacting our Opmetrix Helpdesk to have this setting updated for you when required.

Using Quicklinks in the field

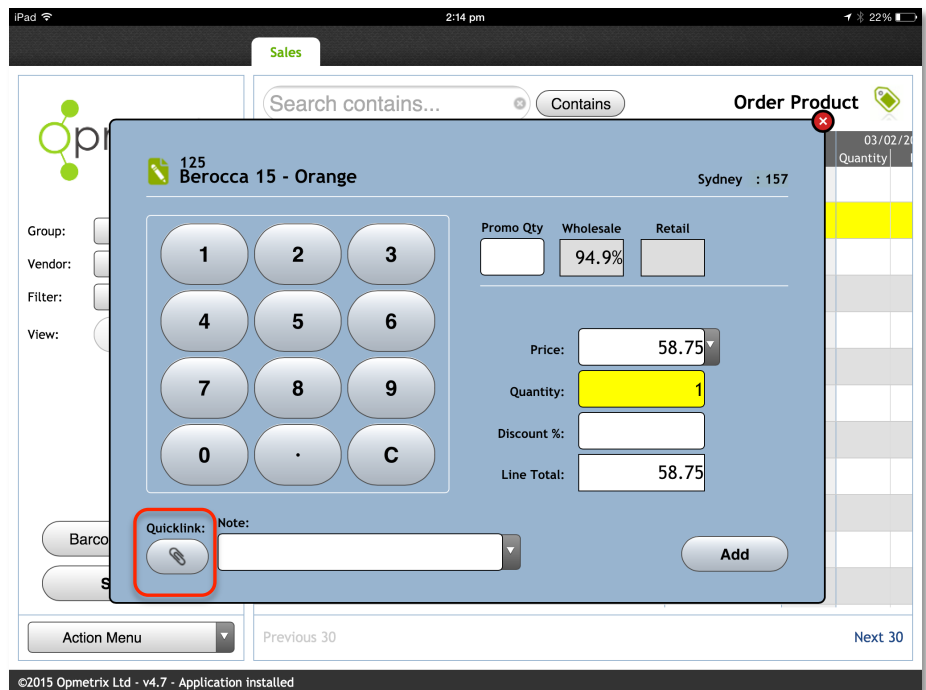


Customer Quicklink

if a customer has a Quicklink it will show as a “paperclip” button on the customer details screen. Selecting the button then accesses the link.

Links are opened in the default application that the device uses. For example a website link may open in Safari browser on an iPad or in Internet Explorer on a Windows 8 Tablet.

Specific document types such as PDF, Excel or Word documents may require an application to be installed on the device to view them. These commonly used documents all have free downloadable viewing apps that are readily available from the respective app stores.



Product Quicklink

If a product has a Quicklink it will show as a “paperclip” button on the product details screen. Selecting the button then accesses the link.

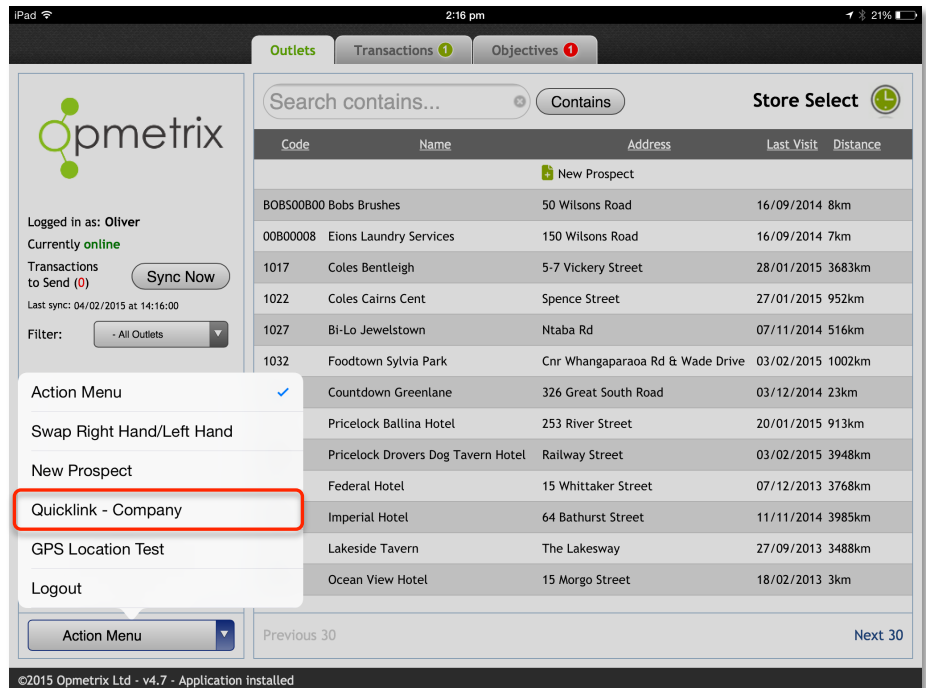
Links are opened in the default application that the device uses. For example a website link may open in Safari browser on an iPad or in Microsoft Explorer on a Windows 8 Tablet.

Specific document types such as PDF, Excel or Word documents may require an application to be installed on the device to view them. These commonly used documents all have free downloadable viewing apps that are readily available from the respective app stores.



Important Note

External documents are not stored offline therefore an active Internet connection will be required to access the external information.



Company Quicklink

The company Quicklink is available from any screen within the Opmetrix app by selecting the Action Menu.