

SmartAdvocate®

Tip of the Week

Are you taking full advantage of the SmartAdvocate ‘Right Click’ functionality? The right click feature, available on most of the pages, grids or list of cases from search results, is a great short cut to additional functionality, saving you time as you navigate the system. The right click feature can usually be used instead of clicking on the ‘Action’ icon typically found in the far-right column. (To activate the feature, you would right click a contact name or on an empty space of the listed items usually displayed in a grid).

Right clicking on a contact name displayed on the Summary Screen of the case, for example, will display a dialogue box with additional contact information about that individual or entity, including address, phone numbers, email address, etc.

Furthermore, an email address displayed in this fashion, provides a hyperlink to activate the email screen.

Quite often, activating the 'Top Search' will result in a long list of cases that satisfy your search criterion. Searching by a popular last name, for example, may display many cases in your list. Right clicking on the case will display a list of fifteen functions that become available without you having to open the case to reach those functions. These include shortcuts to add an appointment, generate a barcode, add a note, generate a document, attach document(s), send an email, go directly to the calendar, add a telephone message, among others. Just bear in mind that you 'right click' on an 'empty' spot on the grid, not on the contact that is displayed (unless, of course, you only want to display the contact information for that individual).