
Powerview Ideas

Posted by ksangha - 2008/02/21 20:59

Is there a way to post a picture to the powerview, so a person can see a pic of the client. If another attorney is meeting with a client at court, they can get an idea of who the client from Time Matters power view?

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Re:Powerview Ideas

Posted by kbross - 2008/02/21 21:13

Yes, this is fairly easy to do. There are, however, a number of methods to do so, so there is really no easy way to make a generic power view to show a picture. The easiest/most flexible way is to customize a field on the contact form that contains a path to the image file. Then the power view is customized to show the image that is referenced in the customized field.

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Re:Powerview Ideas

Posted by prussell - 2008/06/27 18:14

We use Outlook as our email client and TM connect to save email. We need a powerview that will show, in a Matter under the email tab, a listing of email on one side and when clicked, the detail for that particular email appears either below it or beside it. We'd like it to look similar to the way Outlook appears when the reading pane is used. Is this possible?

BTW, I loaded your email view power view this morning and it's great! Thanks for sharing it at no charge.

Patti Russell
Network Administrator
Gearhiser, Peters, Lockaby, Cavett & Elliott
Chattanooga, TN

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Re:Powerview Ideas

Posted by kbross - 2008/06/27 18:27

I think that would be possible as a power view on the Matter list (which would show all emails like the view you downloaded from my site) or on the email list (which would show individual emails, but the list could be filtered by matter).

The problem with what you describe is that there is no Power View available on the sublists, but you want to see it from the matter form. Does this make sense?

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Re:Powerview Ideas

Posted by prussell - 2008/06/27 20:21

Yes, that makes sense. If we were willing to pay for it, could you create one for us?

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Re:Powerview Ideas

Posted by kbross - 2008/06/28 18:53

Sure, feel free to contact me offlist to discuss the details. I can be reached at 973-492-5953 x200.

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Re:Powerview Ideas

Posted by Wendy - 2009/08/19 18:37

kbross wrote:

Yes, this is fairly easy to do. There are, however, a number of methods to do so, so there is really no easy way to make a generic power view to show a picture. The easiest/most flexible way is to customize a field on the contact form that contains a path to the image file. Then the power view is customized to show the image that is referenced in the customized field.

Ok - I've actually done this before but can't seem to duplicate the results. I have added the path to the picture in field MA3:MAT3_06_08 added {MA3:MAT3_06_08} on the Summary View for matters and still don't see the picture. What am I missing? :unsure:

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Re:Powerview Ideas

Posted by Wendy - 2009/08/19 18:38

kbross wrote:

Yes, this is fairly easy to do. There are, however, a number of methods to do so, so there is really no easy way to make a generic power view to show a picture. The easiest/most flexible way is to customize a field on the contact form that contains a path to the image file. Then the power view is customized to show the image that is referenced in the customized field.

Ok I've done this in the past and can't seem to make it work again. I add the path to a pic MA3:MAT3_06_08 then added to the summary view for matters {MA3:MAT3_06_08} but still no pic. What am I missing?

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