PracticeWorks Software

Automation Expert: Linking Documents to Transactions

This one-page job aid is designed for all team members and provides instruction about how to use the AutoLink feature in PracticeWorks practice management software. This job aid includes steps to use the Automation Expert to AutoLink a document to a transaction.

1. **Select the event.**
   a. From the **Experts** menu, select **Automation Expert** > **Events** > **Tx code posting events…**
   b. Select a transaction code, and then click **OK.**
   c. Click **Add.**

2. **Select the response.**
   a. Select **Create document**, and then click **OK.**
   b. Select **Create a specific document.**
   c. Select the document you want to link, and then click **OK.**
   d. Click **OK.**
   e. Select a print option.
   f. Select whether or not the response is optional.

3. **Define the criteria.**
   a. If **Response criteria** are not required, proceed to step **d.**
   b. If **Response criteria** are required, select appropriate **Response criteria.**
   c. Select all criteria that apply, and then click **OK.**
   d. Click **OK.**
   e. Click **Yes.**
   f. Click **OK.**
   g. Click **Cancel.**

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