

SUPPORT DOCUMENT

Document Attachments



palladium
Accounting

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Overview

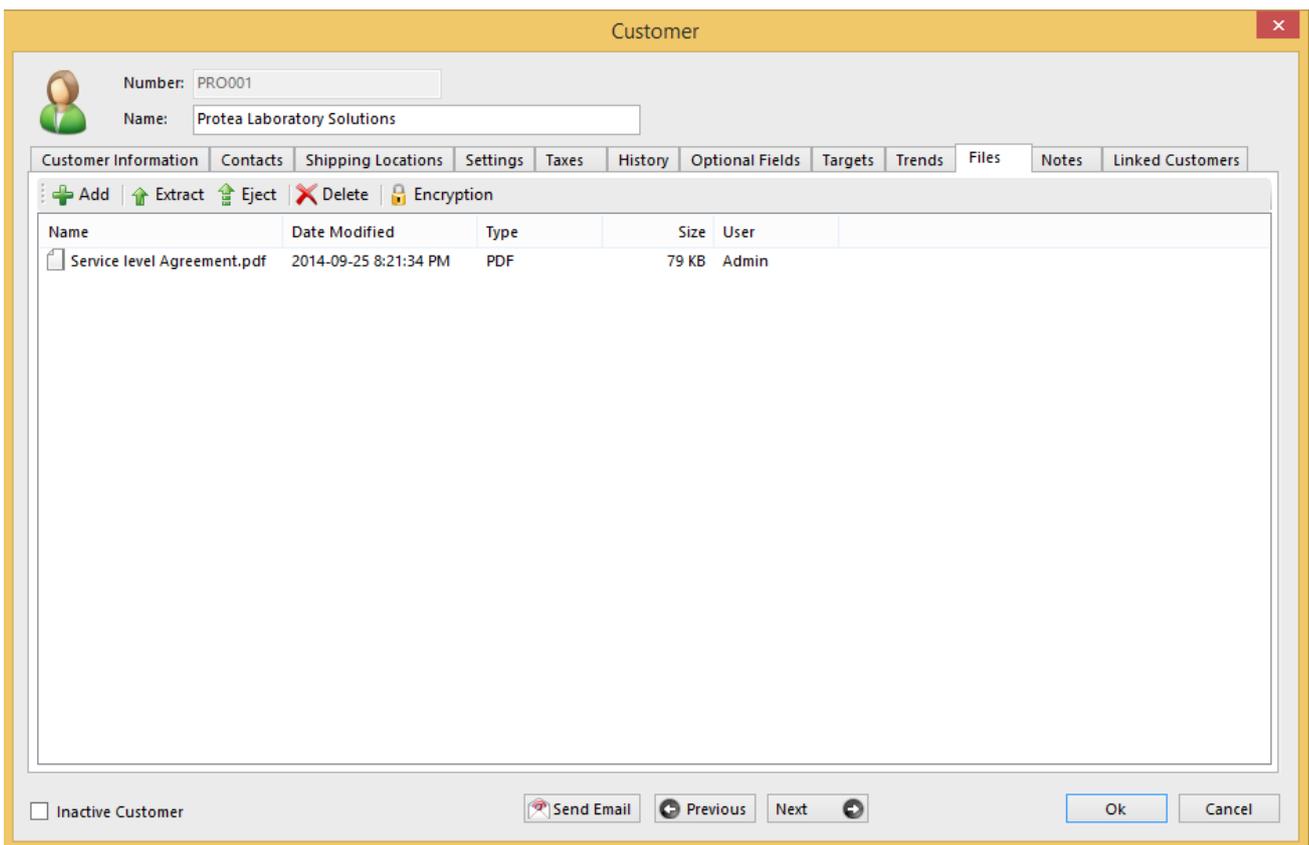
You can attach documents in Palladium in 2 different ways each with their own purpose. These include:

- i. Attaching at Masterfile Level such as Projects, Customers, Vendors and Inventory Masterfile, the latter offering the ability to mail the attachment on the fly with related sales documents
- ii. At transactional level

Masterfile Level

Customer, Vendor, Projects and General Ledger Accounts

This feature is mainly used to attach documents which are relevant to a particular Customer or Vendor at Masterfile level. These documents may include SLA's (Service Level Agreements), Contracts, Spreadsheets, or any other documents that you may wish to refer to in the future. To use this function you simply need to select the files tab in the specific Masterfile then click add to browse to where the document is saved. Attaching this document will add it to the Palladium Database so it is recommended keeping the file sizes to a minimum.

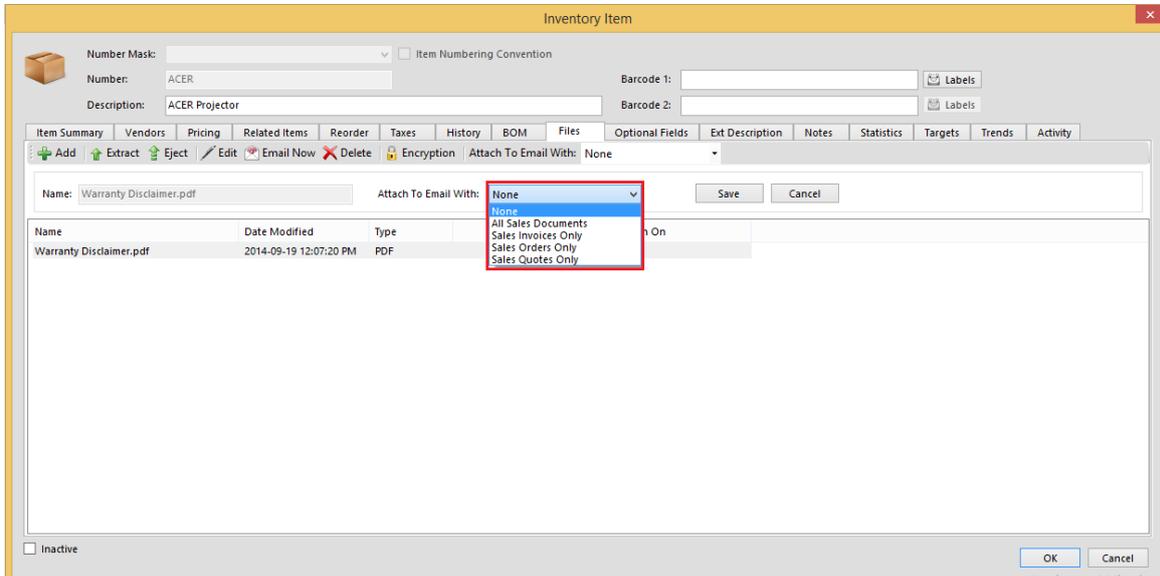


Inventory Masterfile Level

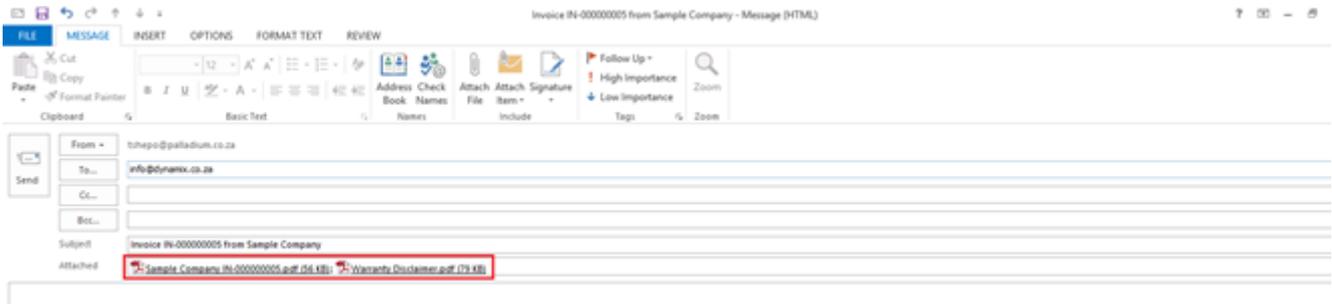
We have detailed this feature separately because in addition to attaching documents for reference purposes, (such as warranties, installation instructions or general information), Palladium gives you the ability to attach these files on-the-fly with any emailed Sales Documents (such as Quotes, Sales Orders or Invoices) that contain this item.

Document Attachments

To set this up you would need to add the document to the Files tab in the inventory masterfile section, and define with which Sales document you would like the document to be sent.



Then when e-mailing the sales document the attached document will populate with the e-mail as illustrated below/



Attaching at Transactional level

This feature allows you to attach related documents at document transactional level (or on all processing documents). You would generally attach a document here for any documents that relate to the transaction itself. This could be a proof of payment for a receipt, or a customer order or delivery note attached to an invoice.

You also have the ability to e-mail document attachments directly from the related processing screen by highlighting the attachments and then clicking on the Email button.

