

dataflow

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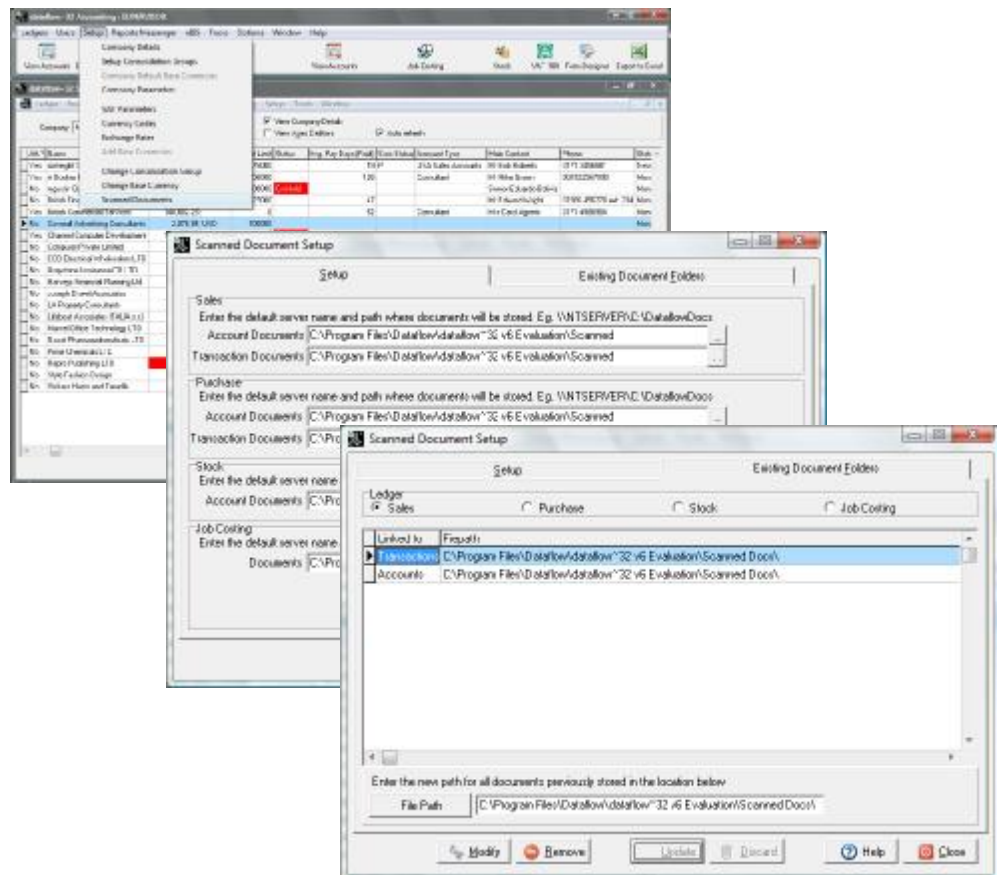
Document Storage

dataflow Document Storage

The Document Storage facility enables you to attach external networked documents such as PDFs, Word Documents, Bitmaps etc. to Sales/Purchase Accounts and transactions (Invoices, Cash and Credits), Job Costing/Project Accounting Details, Stock Codes and SOP/POP Order/Returns, Deliveries/Receipts, Invoices/Credits, Scheduled Orders and Quotations.

In order to use this facility effectively you will need to establish a shared network location with accessible directories to store all the relating Sales/Purchase Ledger, Stock Ledger and Job Costing documents you wish to use with this feature.

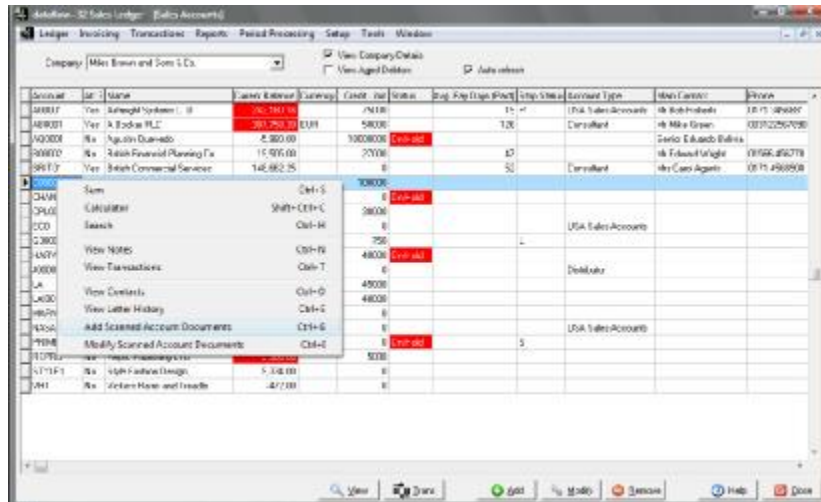
Once these locations have been established you can specify a 'default' path to those directories through the 'Setup' menu and selecting the option 'Scanned Documents' as detailed in the screen shot below.



Having established the source document locations detailed above you can now start using the facility.

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The 'Scanned document' options are accessed using a 'right click' control on most grids throughout *dataflow*, as shown in the screen shot below of the Sales Ledger View Accounts window.



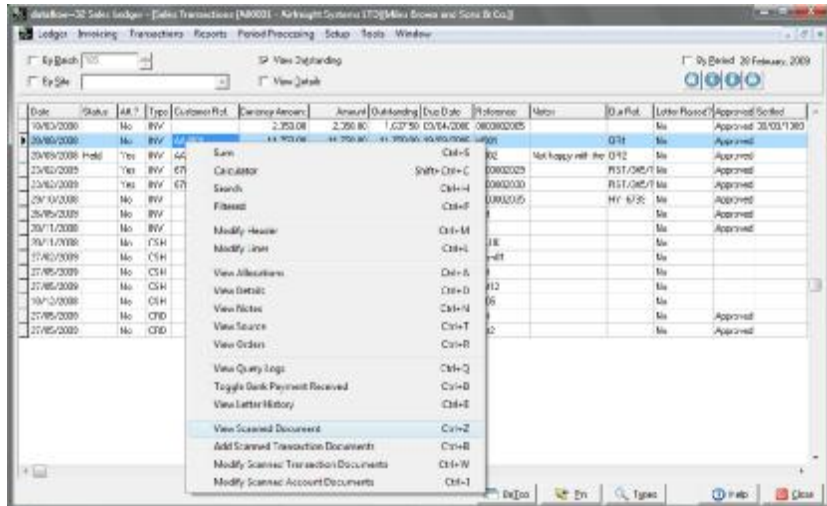
The 'Add Scanned Account documents' option takes you into a secondary window with the 'Open' file browse sub window popping up automatically, allowing you to directly browse for the file you wish to attach as detailed in the screenshot below. (You also have the ability to modify existing attachments through this window by clicking the 'Modify' button).



The 'Modify Scanned Account documents' option again takes you into an identical secondary window but without 'Open' file browse sub window popping up. (You also have the ability to add additional attachments through this window by clicking the 'Add' button).

Using 'right click' control when viewing Sales or Purchase Ledger transactions you will receive two more options in addition to those detailed above.

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These options are:

'View Scanned Document'

This option enables you to view documents saved against the account.

'Add Scanned Transaction Documents'

This option enables you to save a document against the individual transaction.

'Modify Scanned Transaction Documents'

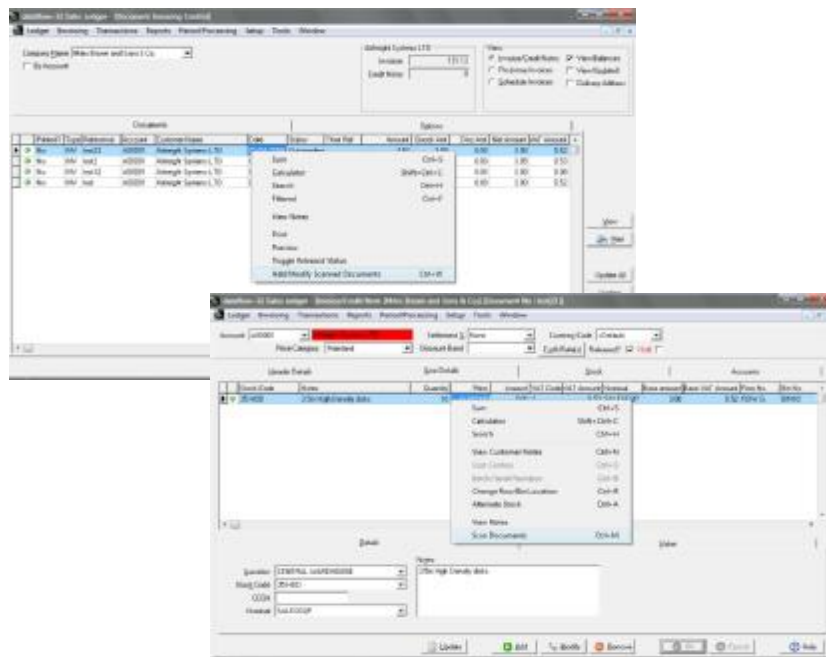
This option enables you to modify a previously saved transaction document.

'Modify Scanned Account Document'

This option enables you to modify a previously saved account document.

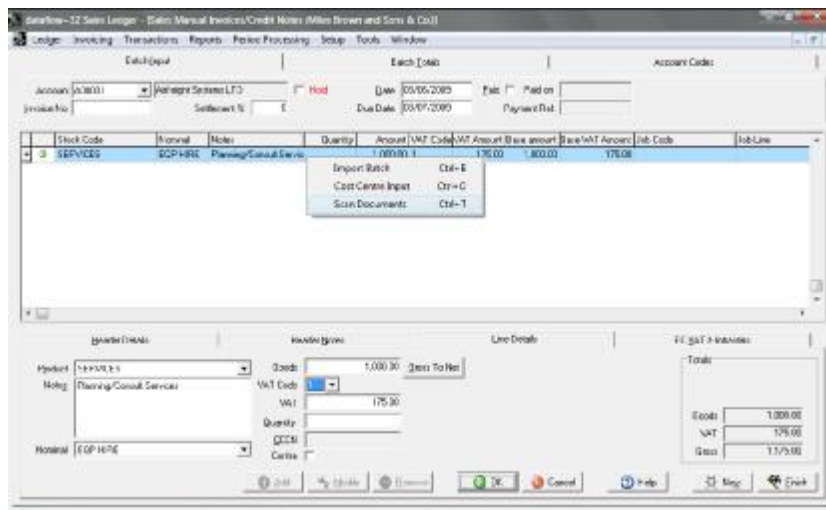
As mentioned previously the Scanned Documents 'right click' menu can be accessed throughout the system. These windows include:-

Sales Document invoicing control main screen and transaction input screen

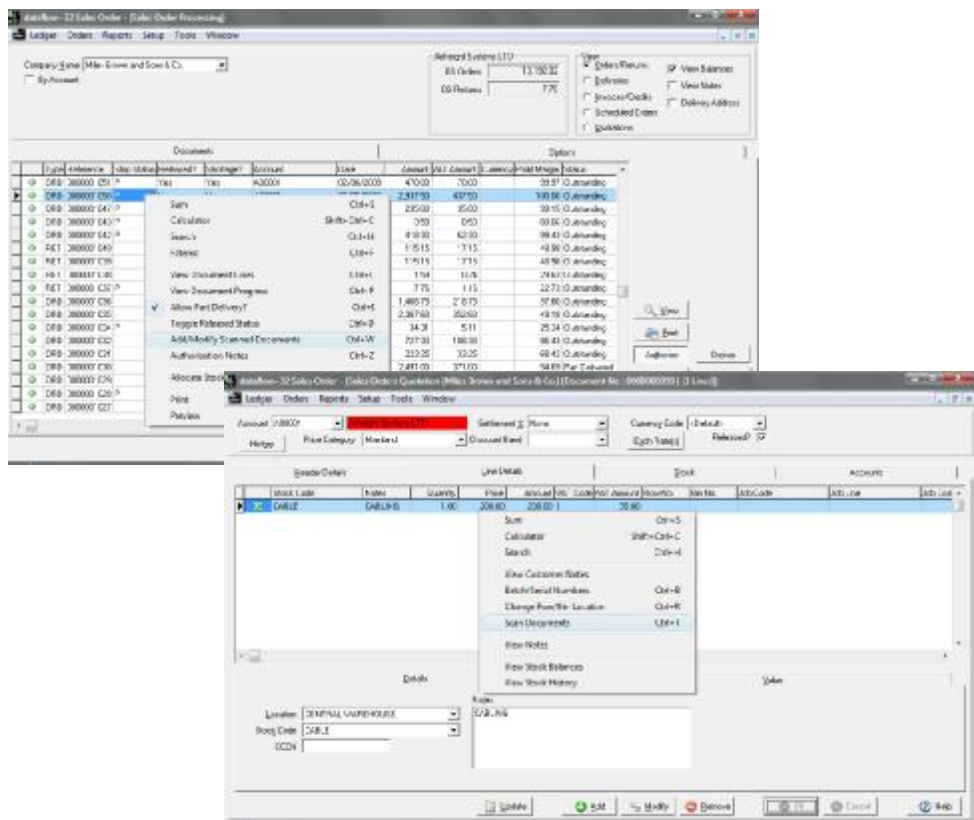


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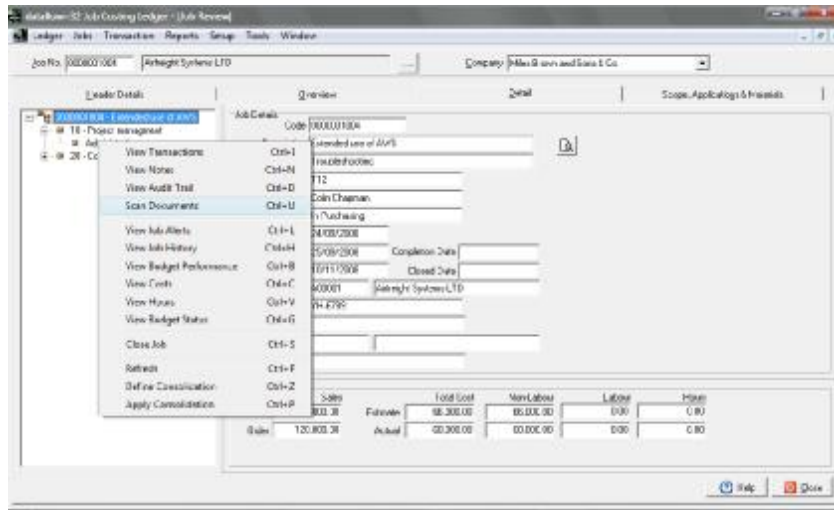
Sales/ Purchase Ledger Manually Raised Invoices & Credits screen



Sales/ Purchase Order Processing Ledger main screen and transaction input screen



Job Costing Review 'Detail' tab



Job Costing Control Enquiry and 'Outline & Cost' tab when 'Add', 'Modify' or Viewing a Job.

