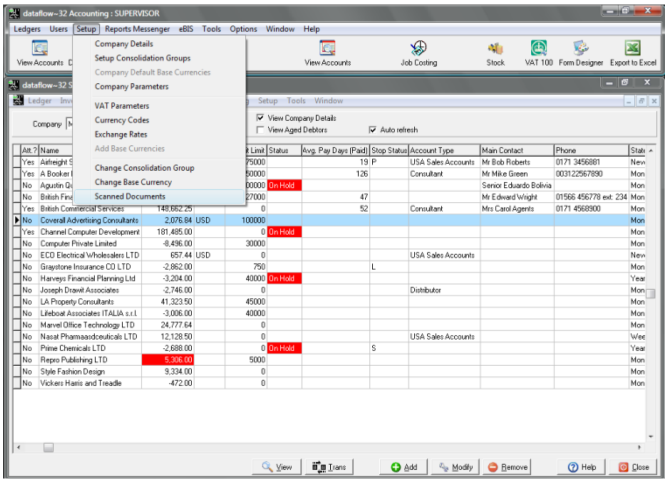
Scanned Documents

Introduction

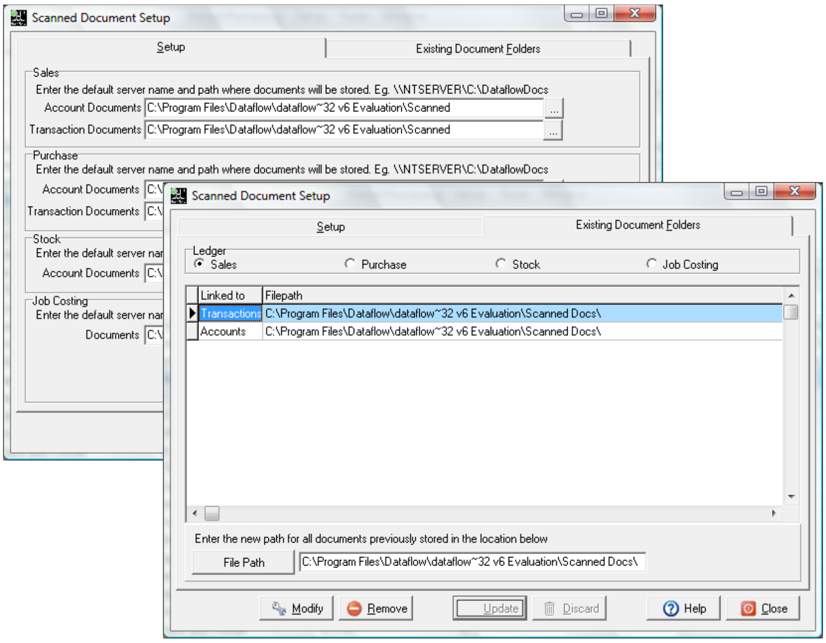
The Scanned Documents facility enables you to attach external networked documents such as PDF’s, Word Documents, Bitmaps etc. to Sales/ Purchase Accounts and transactions (Invoices, Cash and Credits), Job Costing/ Project Accounting Details, Stock Codes and SOP/ POP Order/Returns, Deliveries/ Receipts,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

Usage

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.

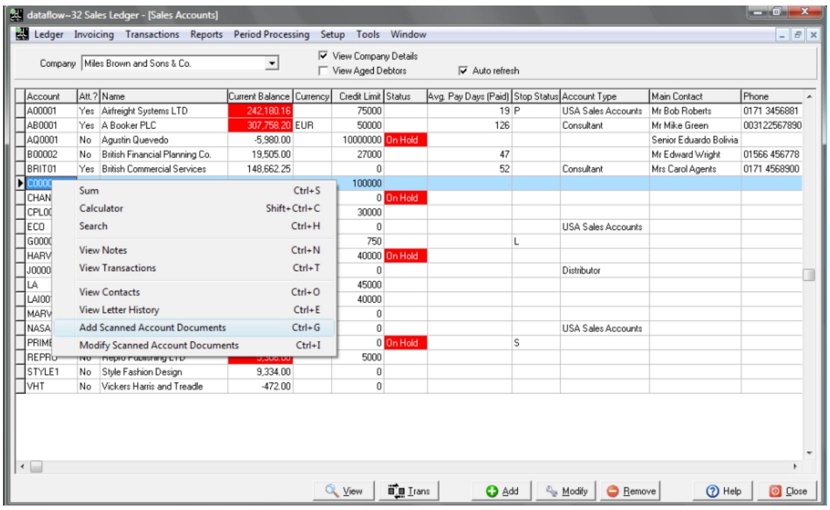


Once these locations have been established you can specify a 'default' path to those directories through the 'Setup' menu and selecting the option 'Scanned Documents' as detailed in the screen shot below;

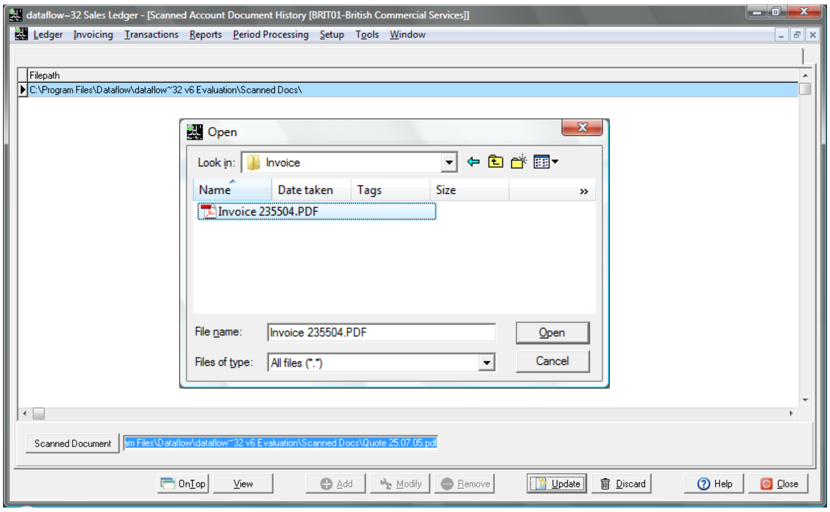


Having established the source document locations detailed above you can now start using the facility.

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.

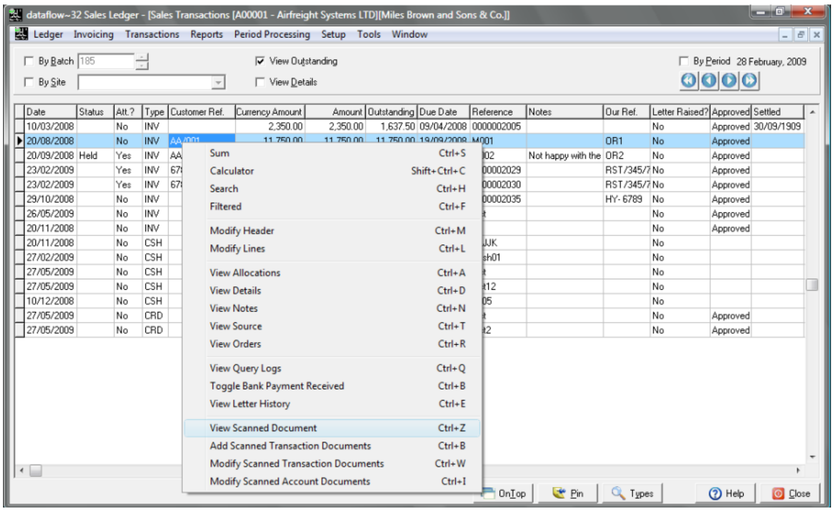


The *Add Scanned Account documents* option takes you into a secondary window with the 'Open ' file browse sub window popping up automatically allowing you to directly browse for the file you wish to attach as detailed in the screenshot below. *(You also have the ability to modify existing attachments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

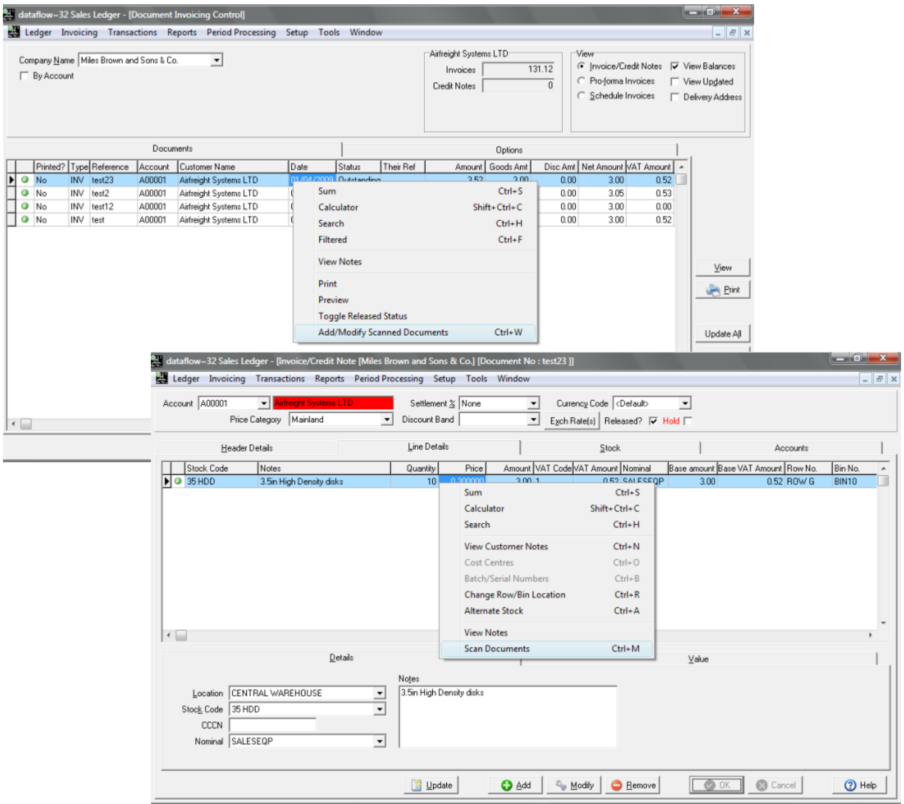


These options are;

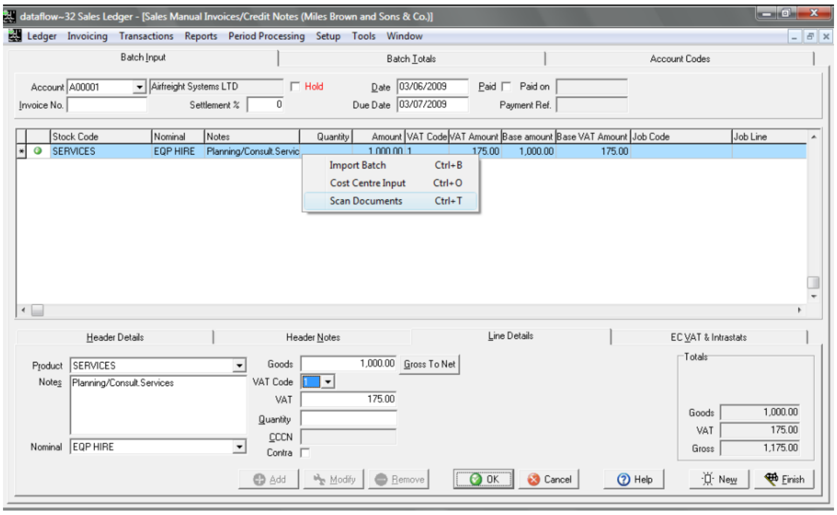
'View Scanned Document'	*This option enables you to view documents saved against the account.*
'Add Scanned Transaction Documents'	*This option enables you to save a document against the individual transaction.*
'Modify Scanned Transaction Documents'	*This option enables you to modify a previously saved 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 access throughout the system. These windows include;

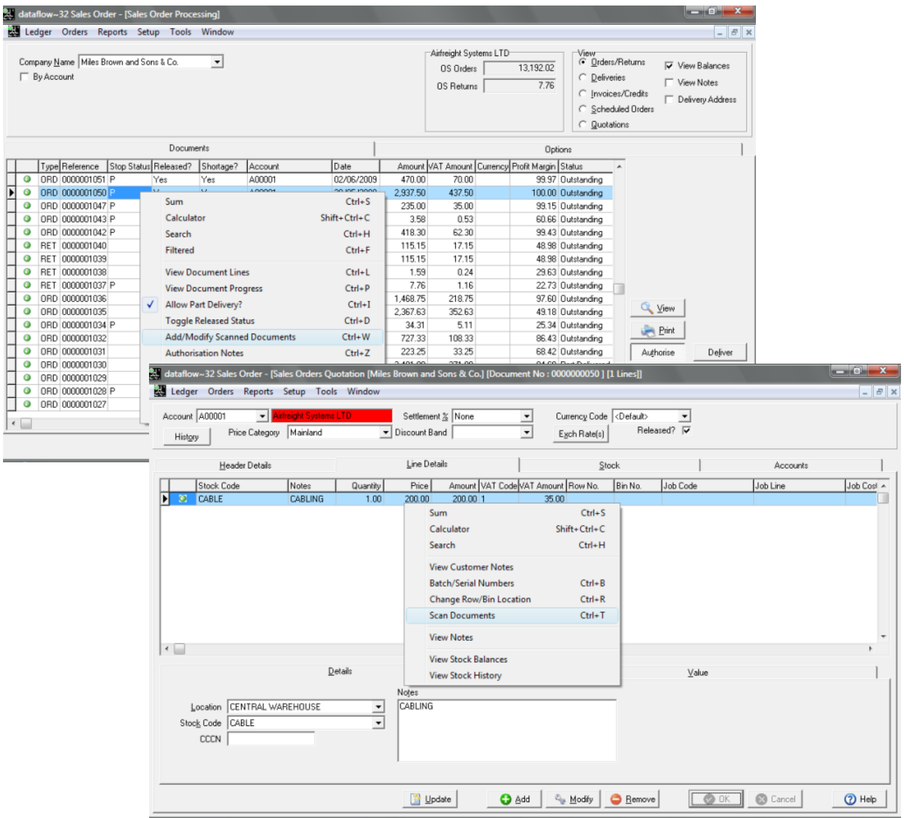
Sales Document invoicing control main screen and transaction input screen



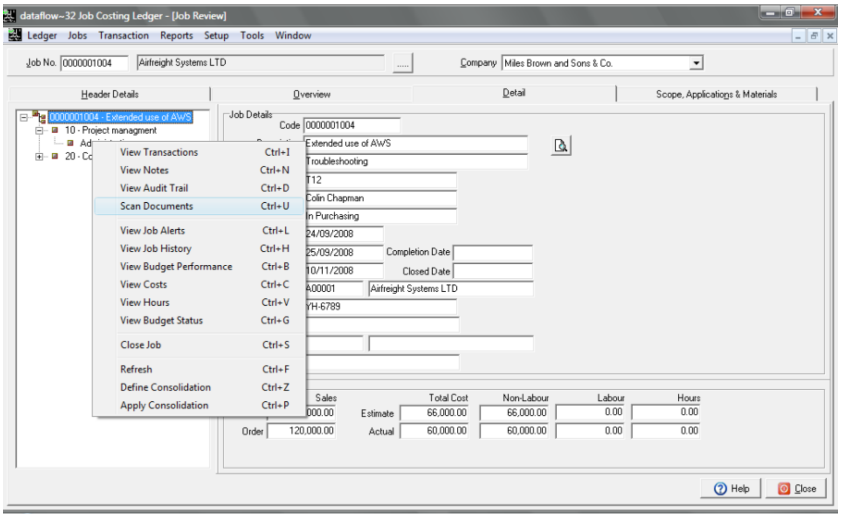
Sales/ Purchase Ledger Manually Raised Invoices & Credits screen;



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.