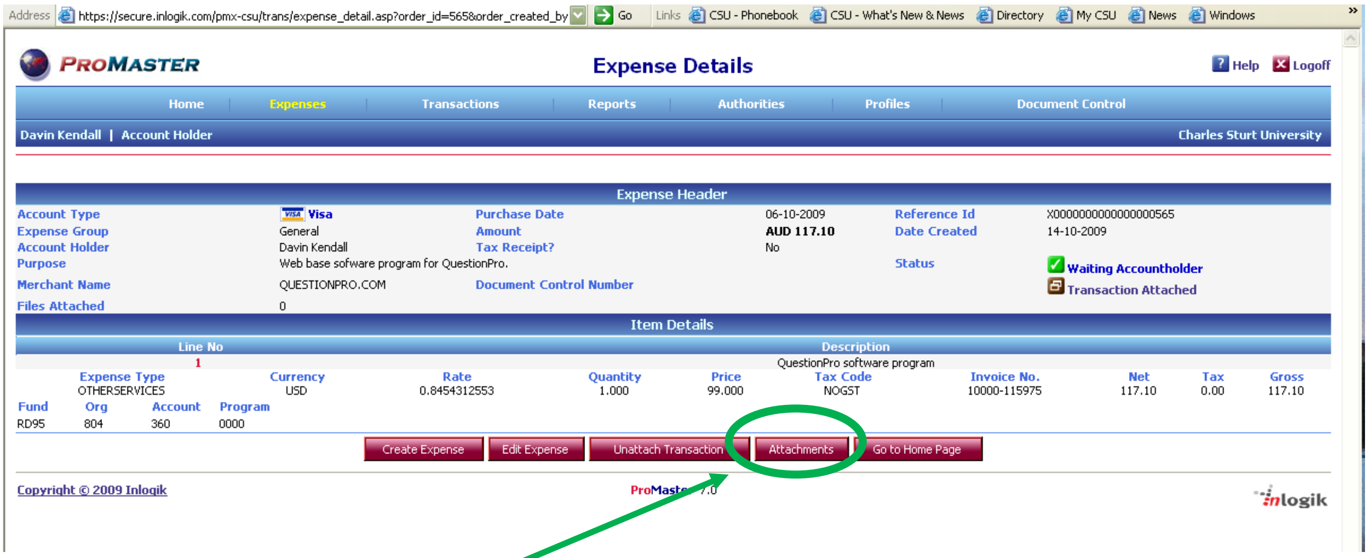
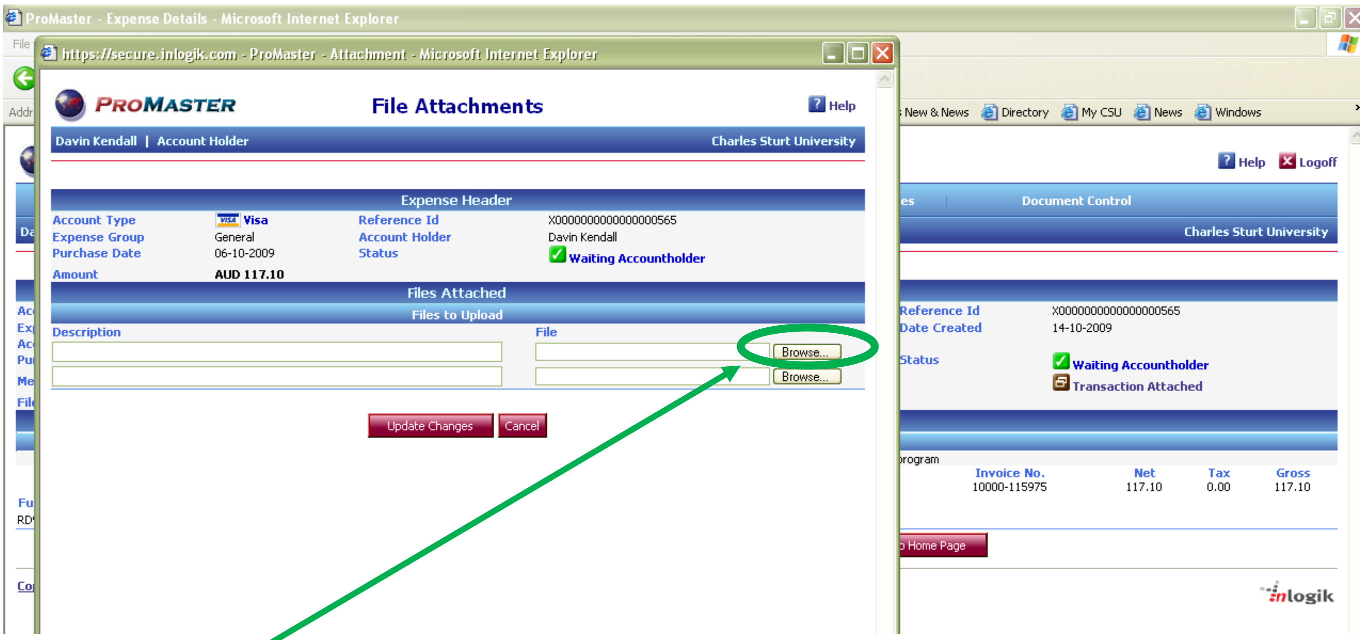
Attaching scanned documents in Promaster

It is recommended that a folder be set up on the S drive for you to store your scanned transaction documentation. This will make it easy to pick up the scanned file as an attachment.

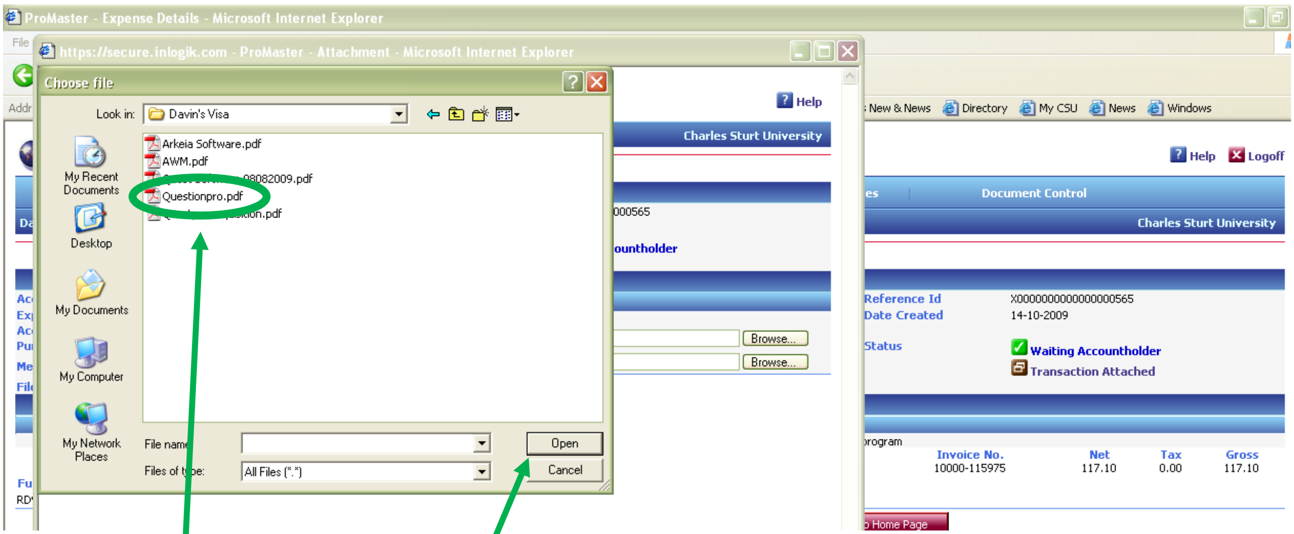
As you process your transaction and save it brings up the following screen.



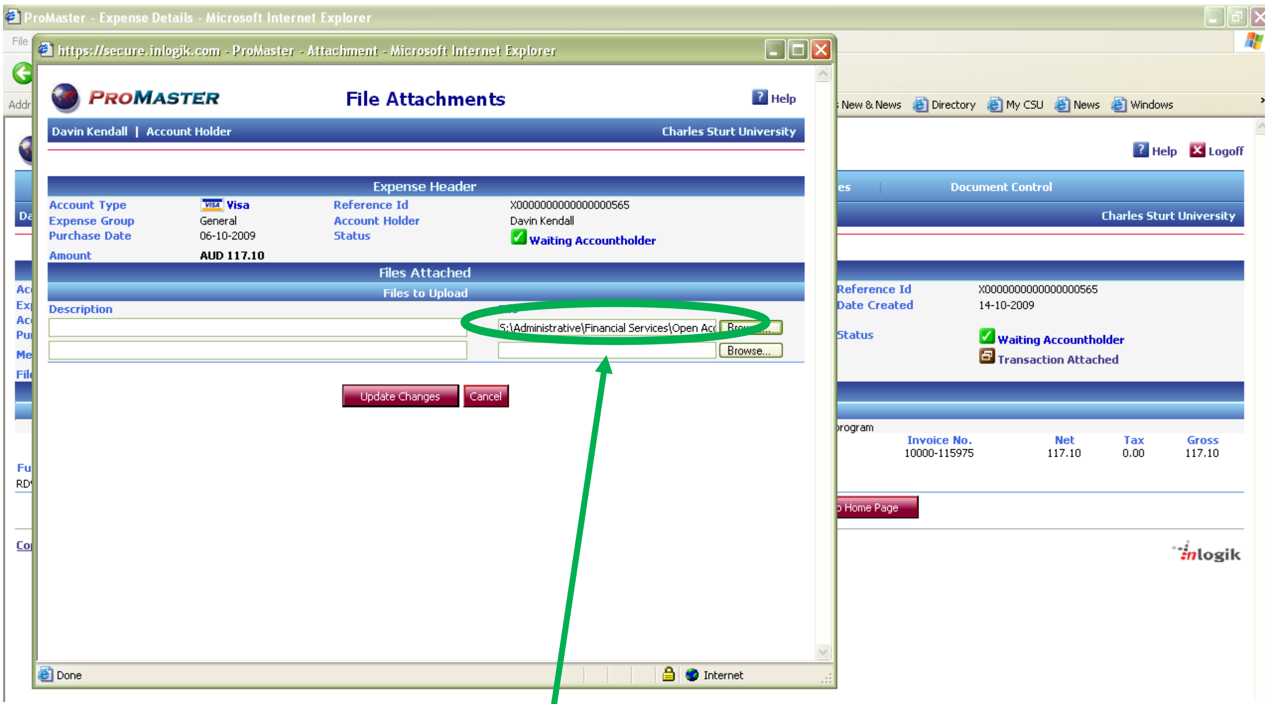
From here you can click on “Attachments” and it brings up the following screen.



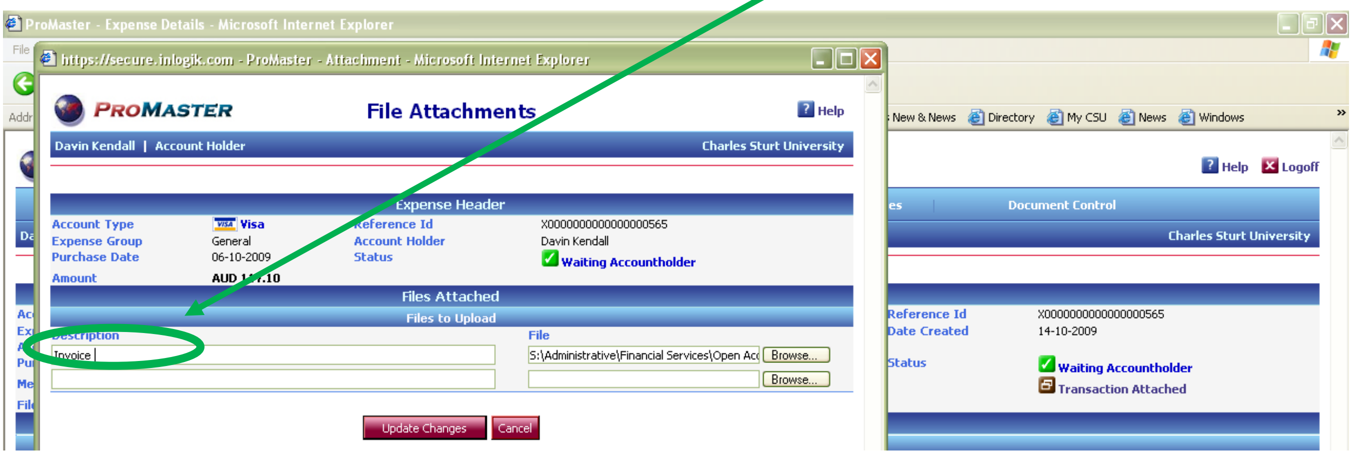
Click on “Browse” and locate your scanned documents.



Select your file and then click open

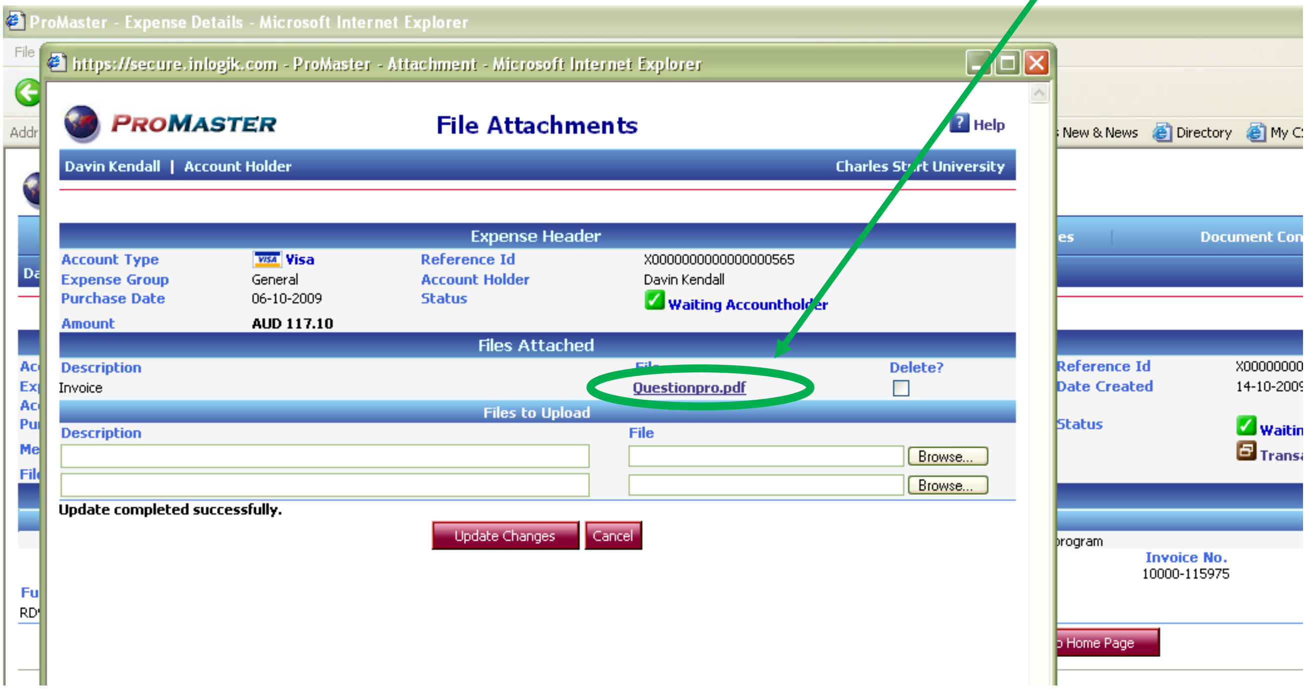


This will bring the file name into Promaster. Type in a description of the attachment Eg. Tax invoice & Requisition



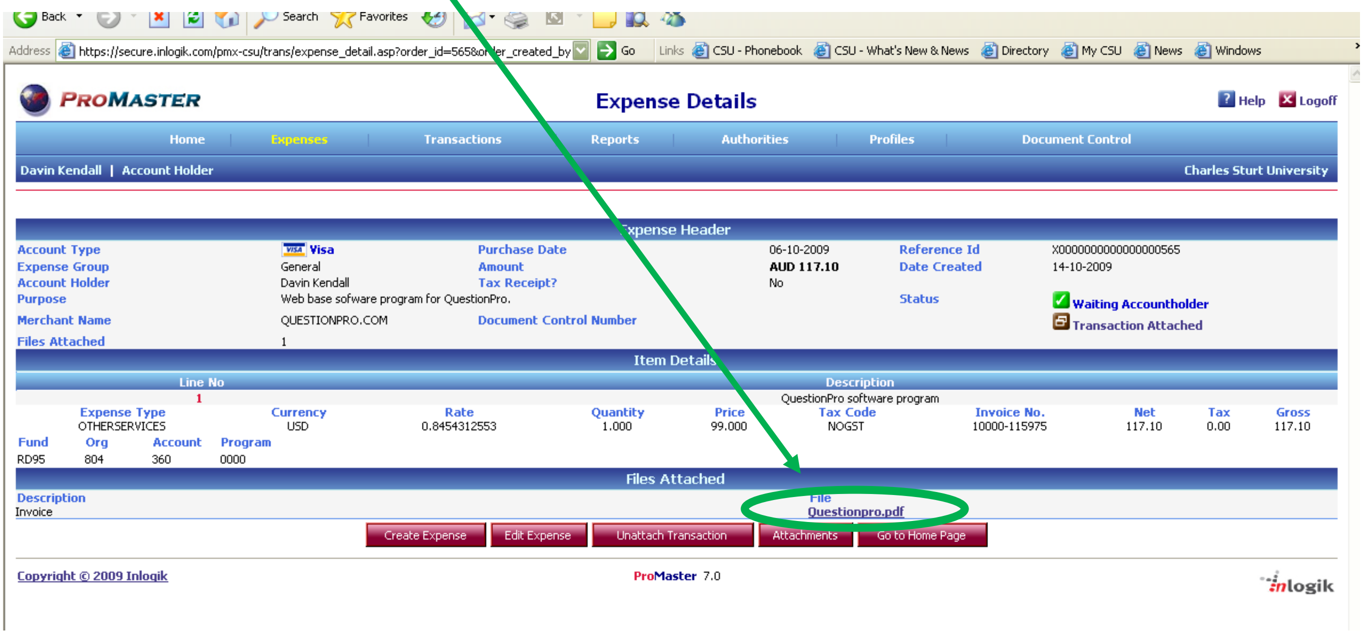
If you have another file to attach repeat the above steps.

Once you have attached your file/s, click on “Update Changes”. You will see the file attached.



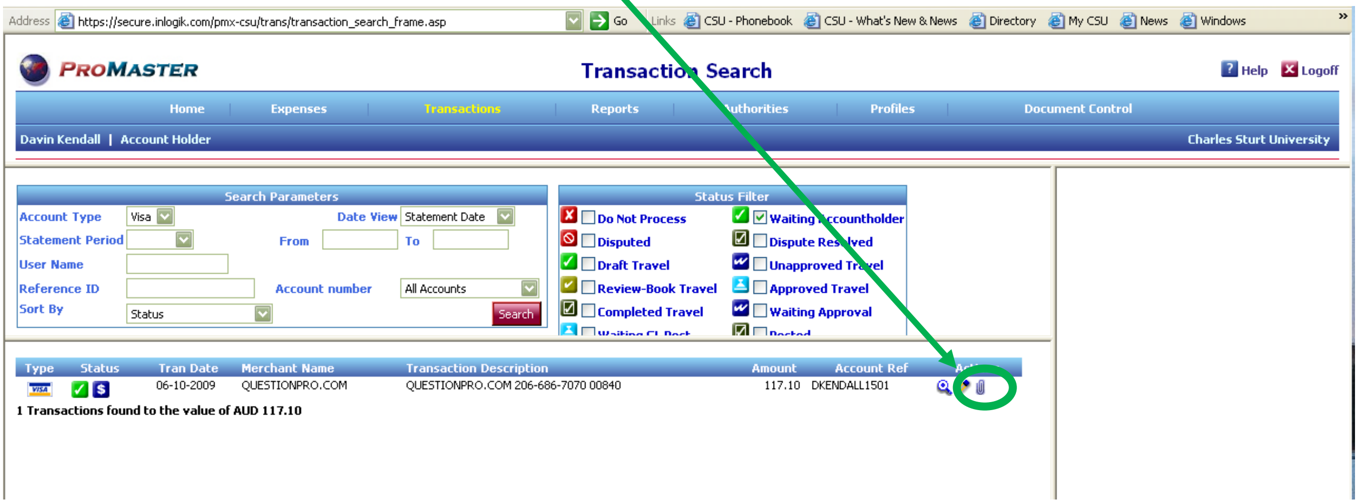
Once you have attached all your scanned files, click on Cancel to return to the transaction screen.

You will see the file attached.

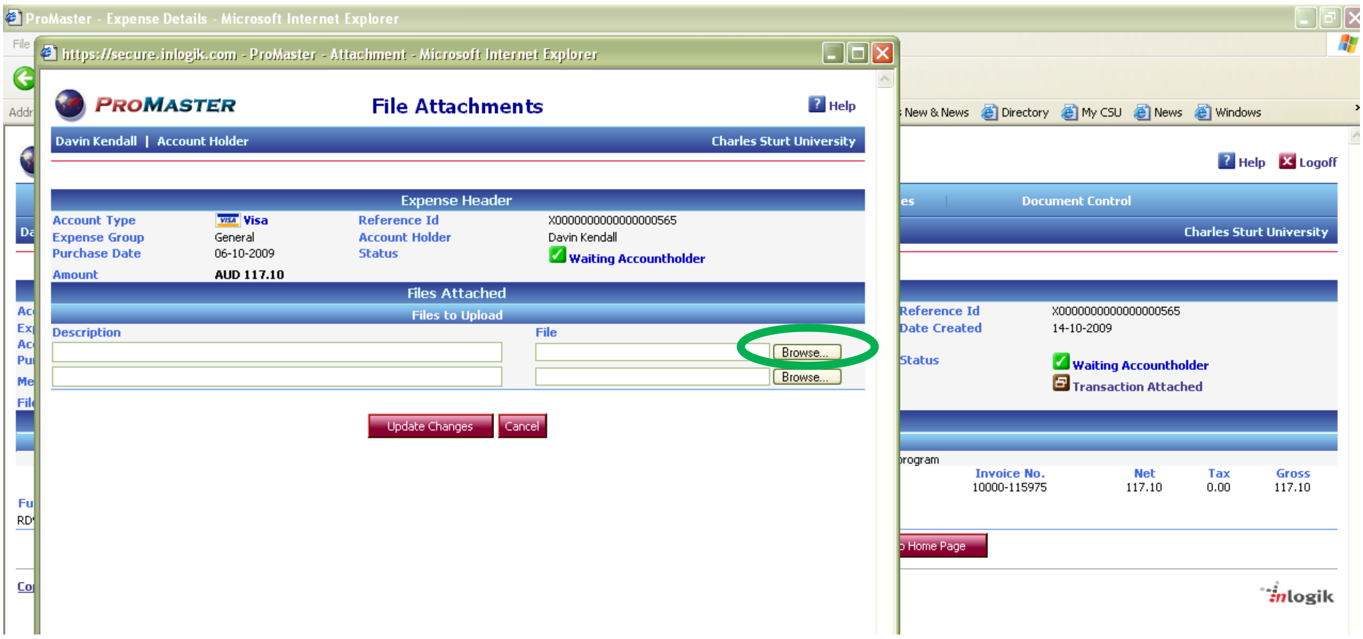


Another way of attaching documents - when a transaction has already been processed by you.

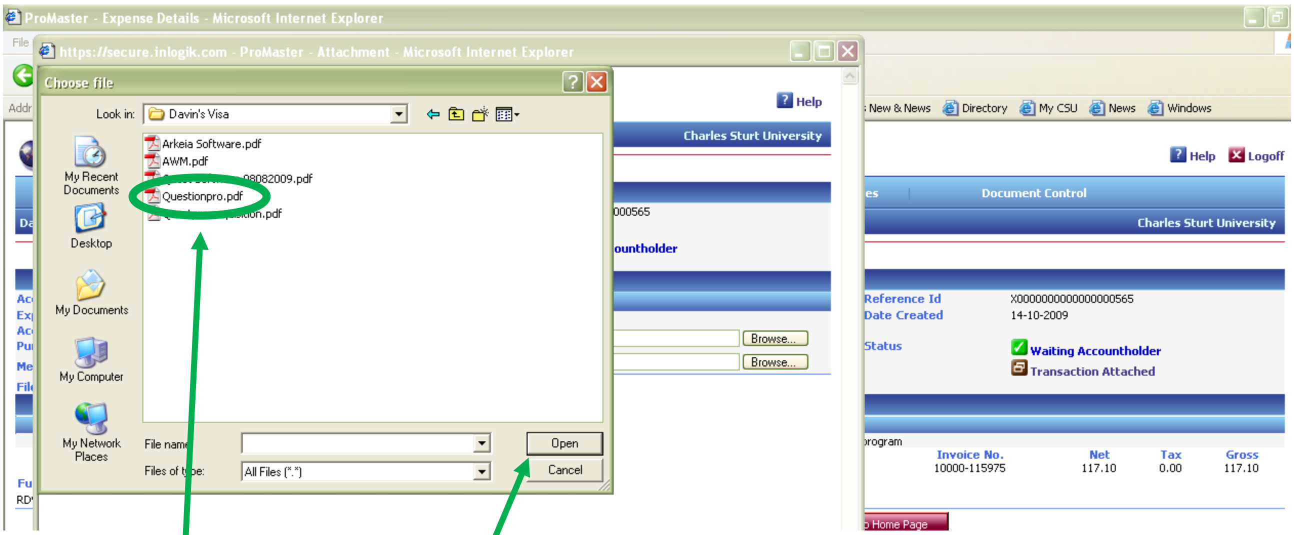
From your transaction screen, select the for the transaction you want to attach the file to.



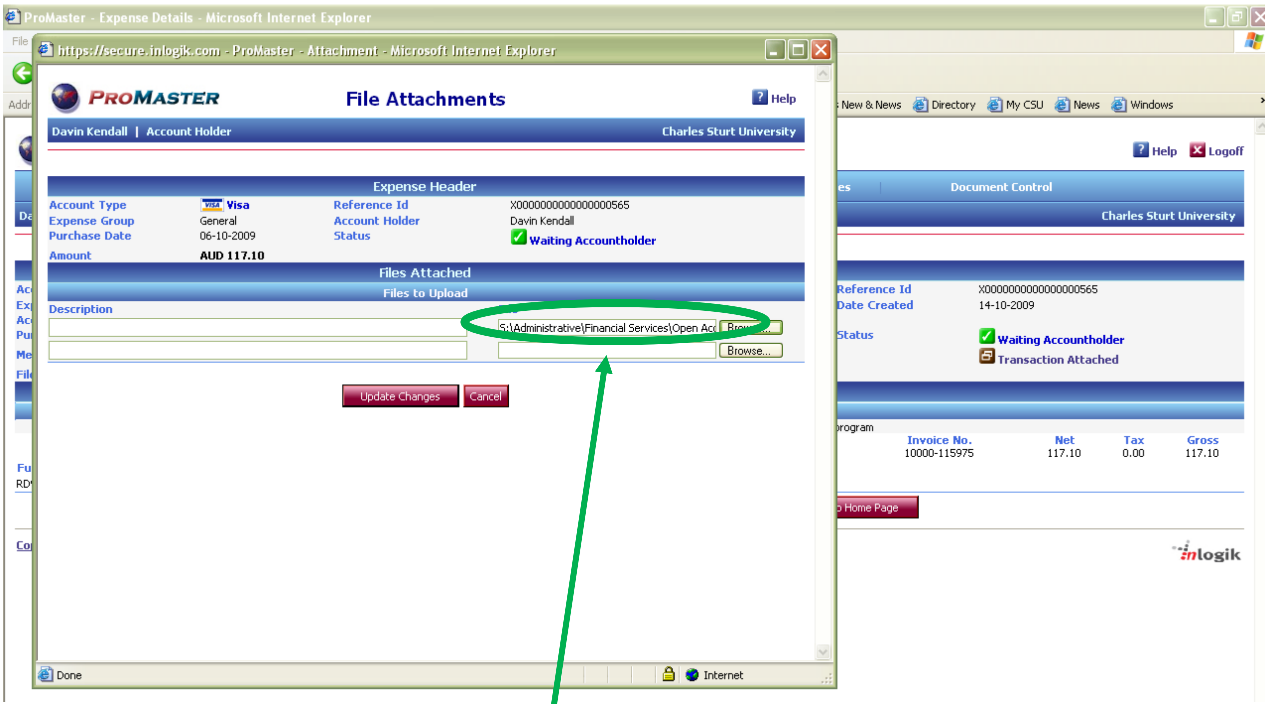
This brings up the following screen.



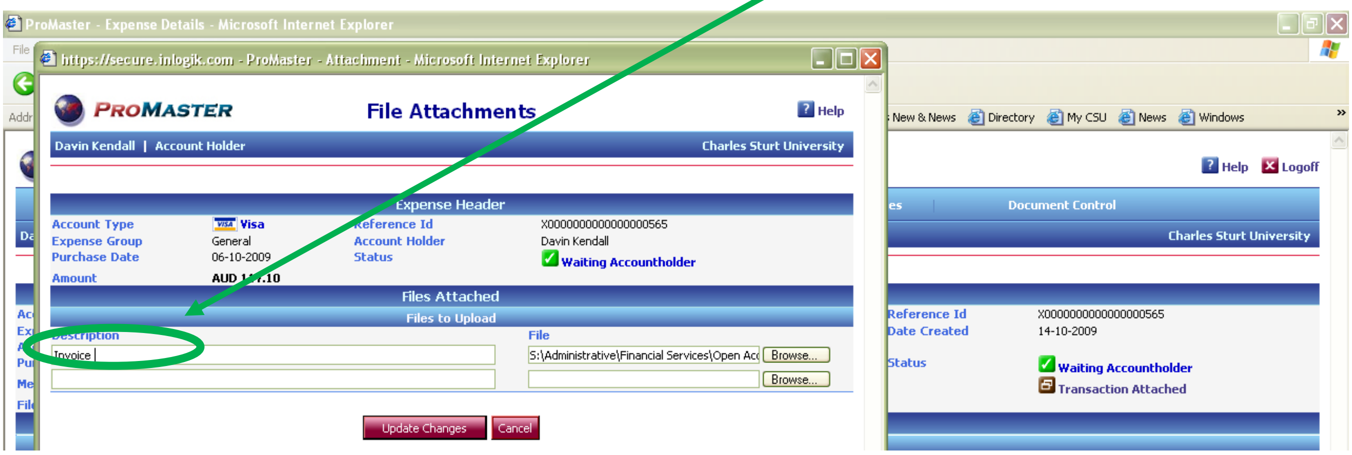
Click on "Browse" and locate your scanned documents.



Select your file and then click open

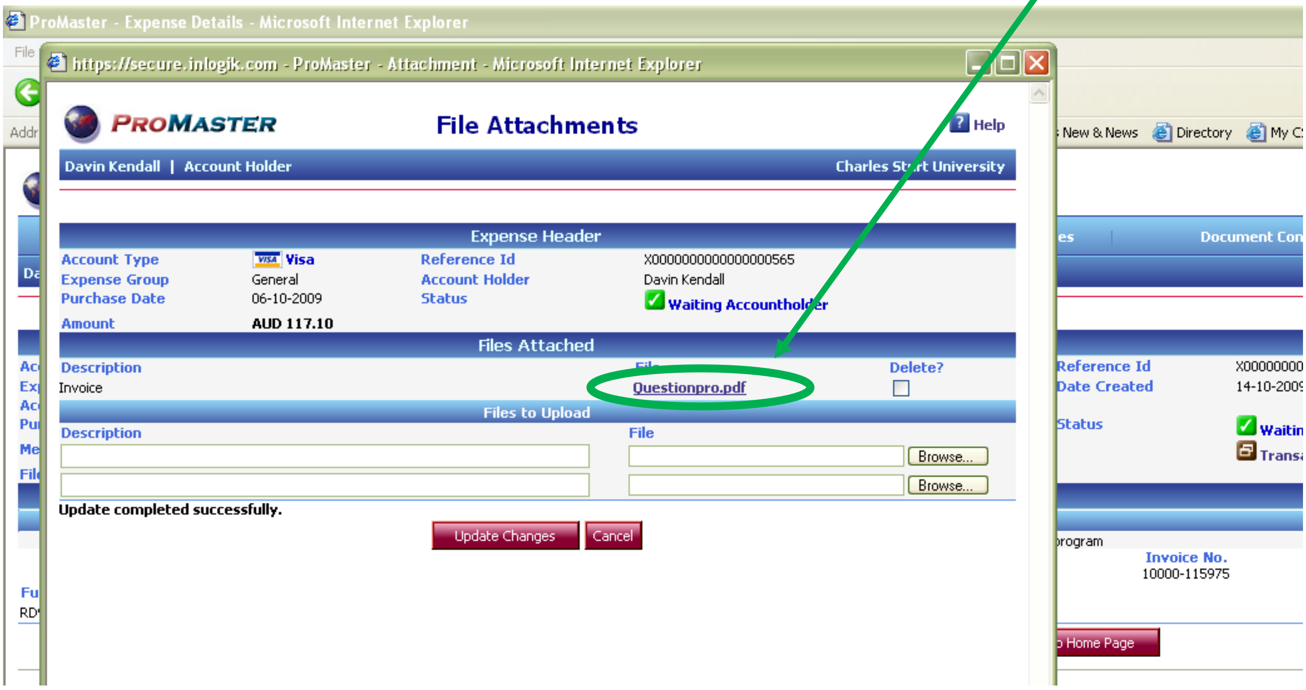


This will bring the file name into Promaster. Type in a description of the attachment Eg. Tax invoice & Requisition



If you have another file to attach repeat the above steps.

Once you have attached your file/s, click on "Update Changes". You will see the file attached.



Now you can click on Cancel to return to the transaction screen.

You will see the file attached.