

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.

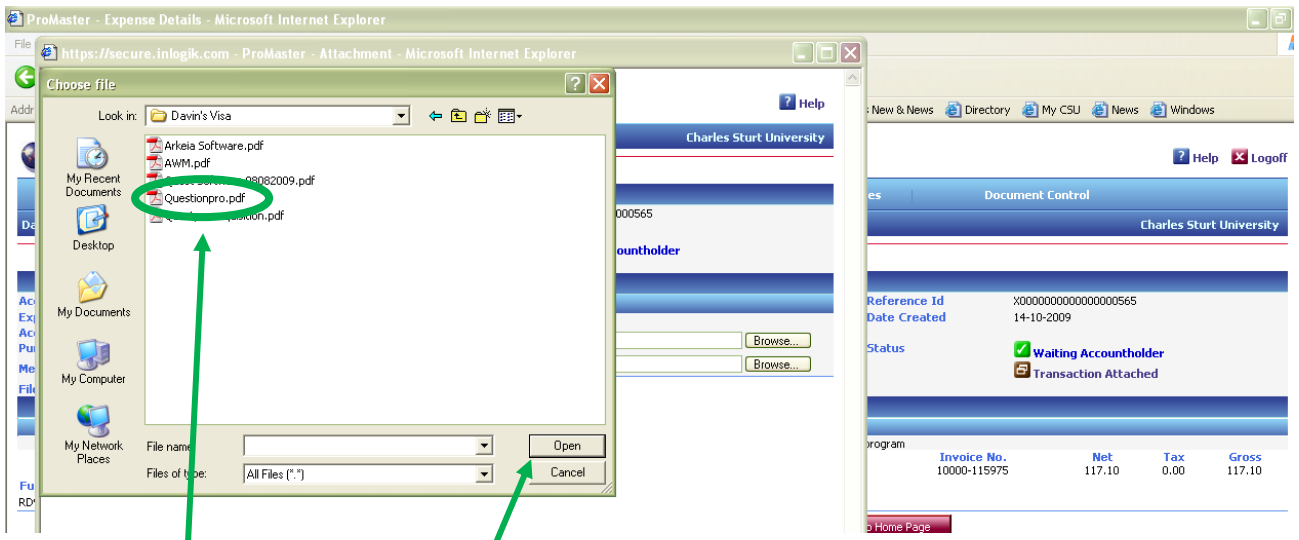
As you process your transaction and save it brings up the following screen.

The screenshot shows the 'Expense Details' page in the Promaster system. The page includes a navigation bar with 'Home', 'Expenses', 'Transactions', 'Reports', 'Authorities', 'Profiles', and 'Document Control'. Below this is a header for 'Expense Header' with fields for Account Type (Visa), Expense Group (General), Purchase Date (06-10-2009), Amount (AUD 117.10), Reference Id (X000000000000000565), Date Created (14-10-2009), Purpose (Web base software program for QuestionPro), Merchant Name (QUESTIONPRO.COM), and Document Control Number. A table titled 'Item Details' shows one line item with a description 'QuestionPro software program', quantity 1.000, and price 99.000. At the bottom, there are buttons for 'Create Expense', 'Edit Expense', 'Unattach Transaction', 'Attachments', and 'Go to Home Page'. The 'Attachments' button is circled in green, and a green arrow points from it towards the next screenshot.

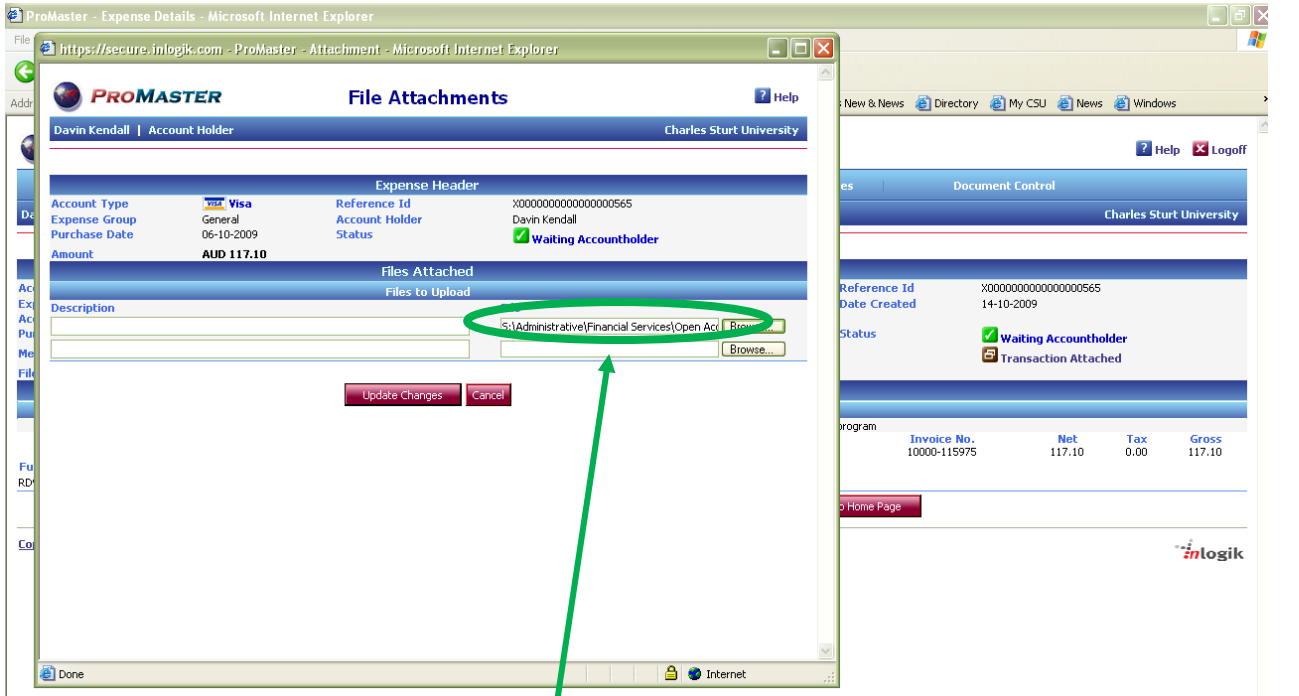
From here you can click on "Attachments" and it brings up the following screen.

The screenshot shows the 'File Attachments' page in the Promaster system. It displays the same 'Expense Header' information as the previous screen. Below this, there is a section for 'Files Attached' with a table for 'Files to Upload' containing columns for 'Description' and 'File'. Two 'Browse...' buttons are present in the 'File' column. The top 'Browse...' button is circled in green, and a green arrow points from it towards the next step.

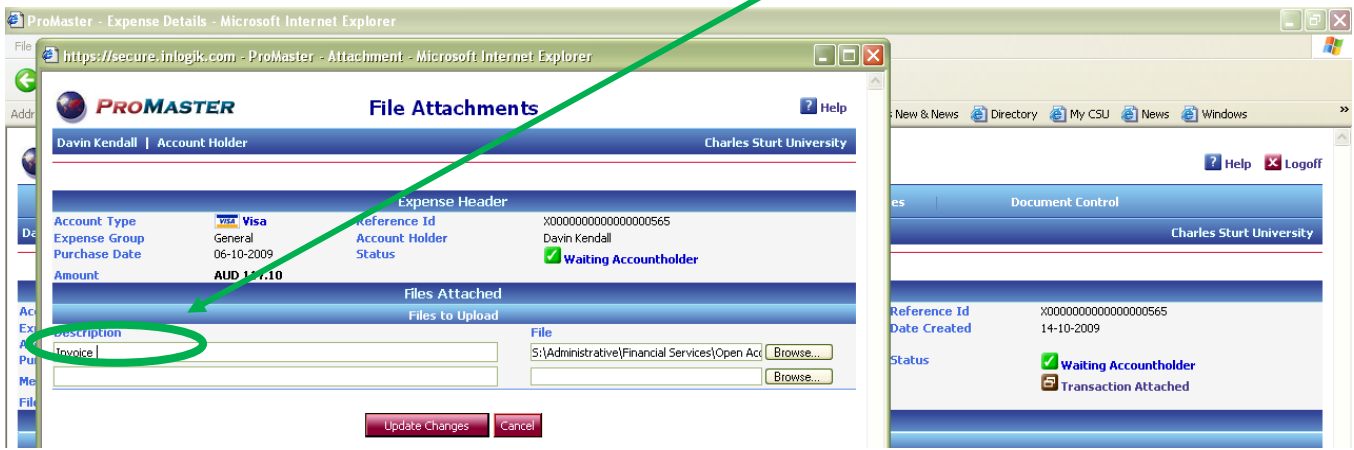
Click on "Browse" and locate your scanned documents.



Select your file and then click open

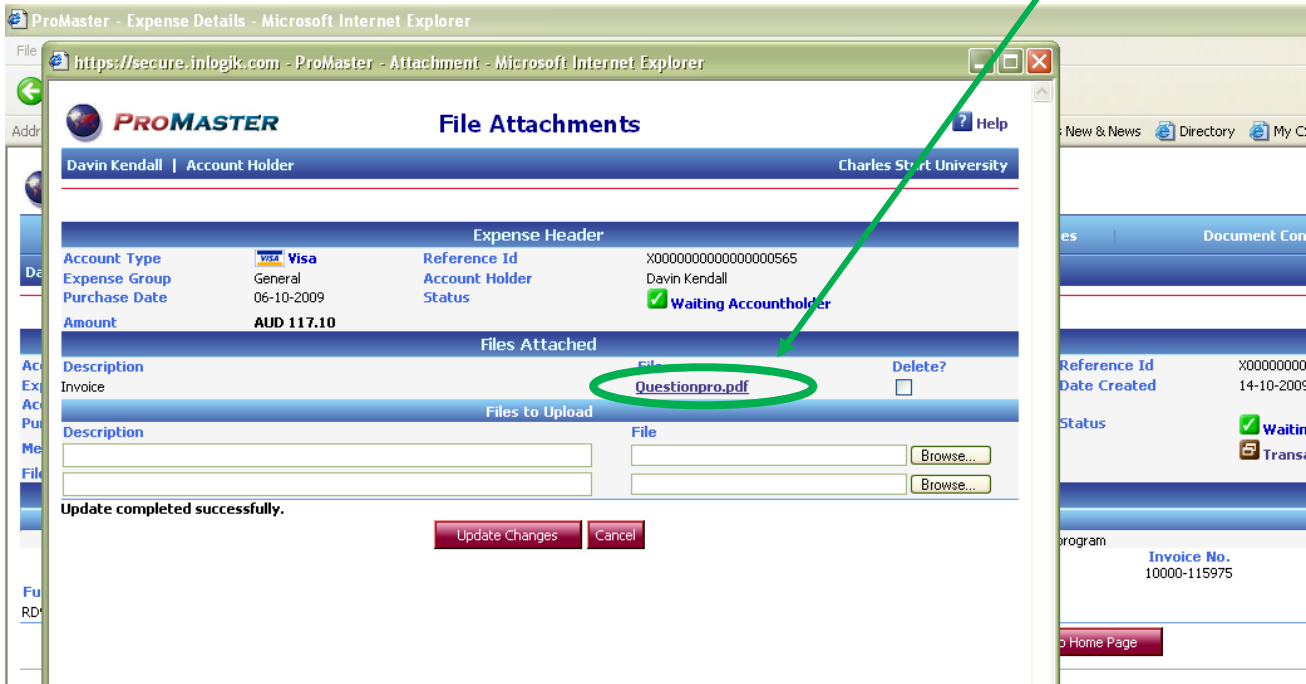


This will bring the file name into Promaster. Type in a description of the attachment Eg. Tax invoice & Requisition



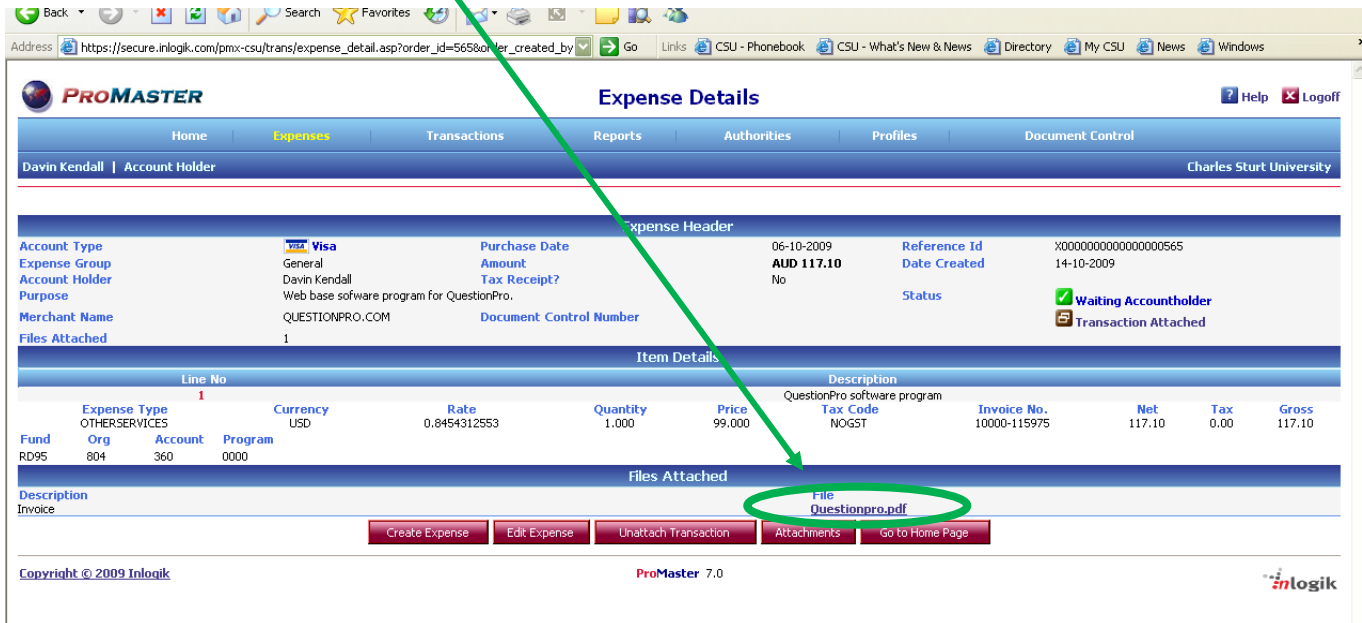
If you have another file to attach repeat the above steps.

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




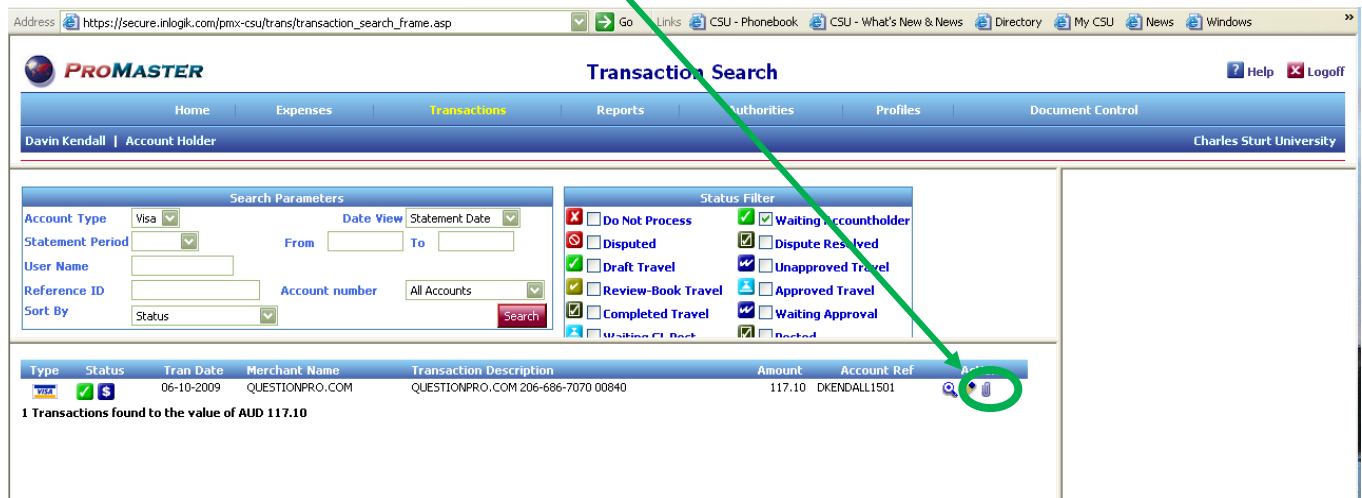
Once you have attached all your scanned files, click on Cancel to return to the transaction screen.

You will see the file attached.

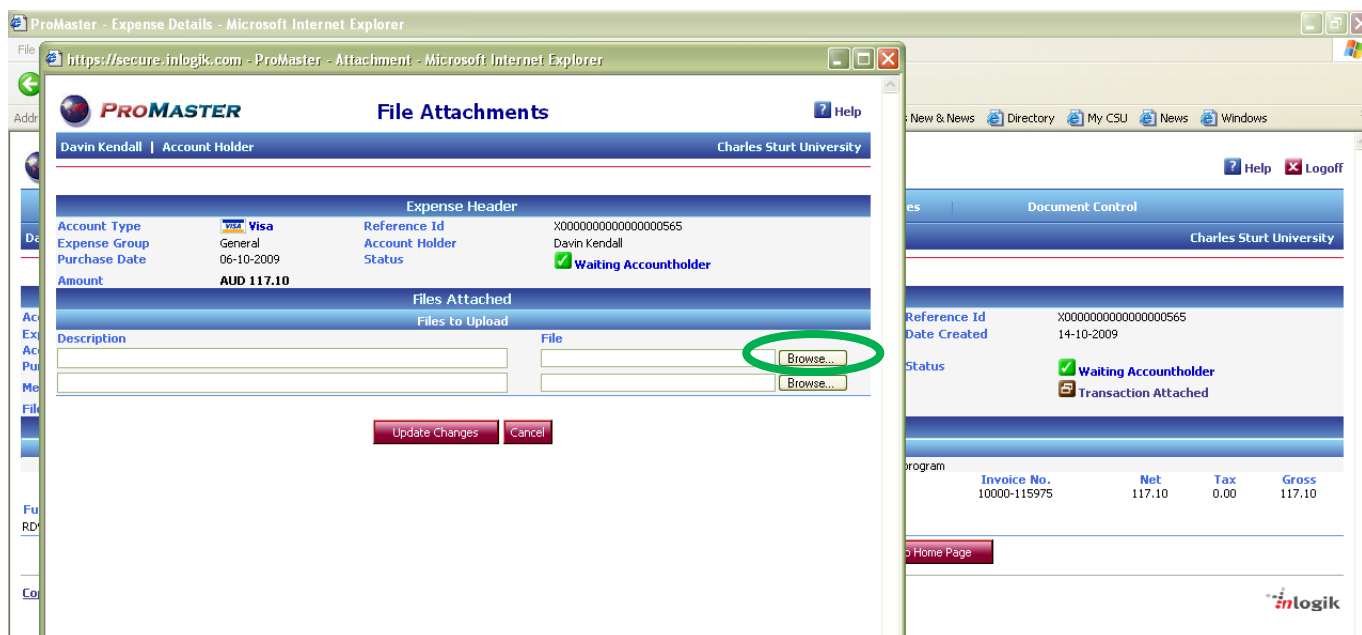


Another way of attaching documents - when a transaction has already been processed by you.

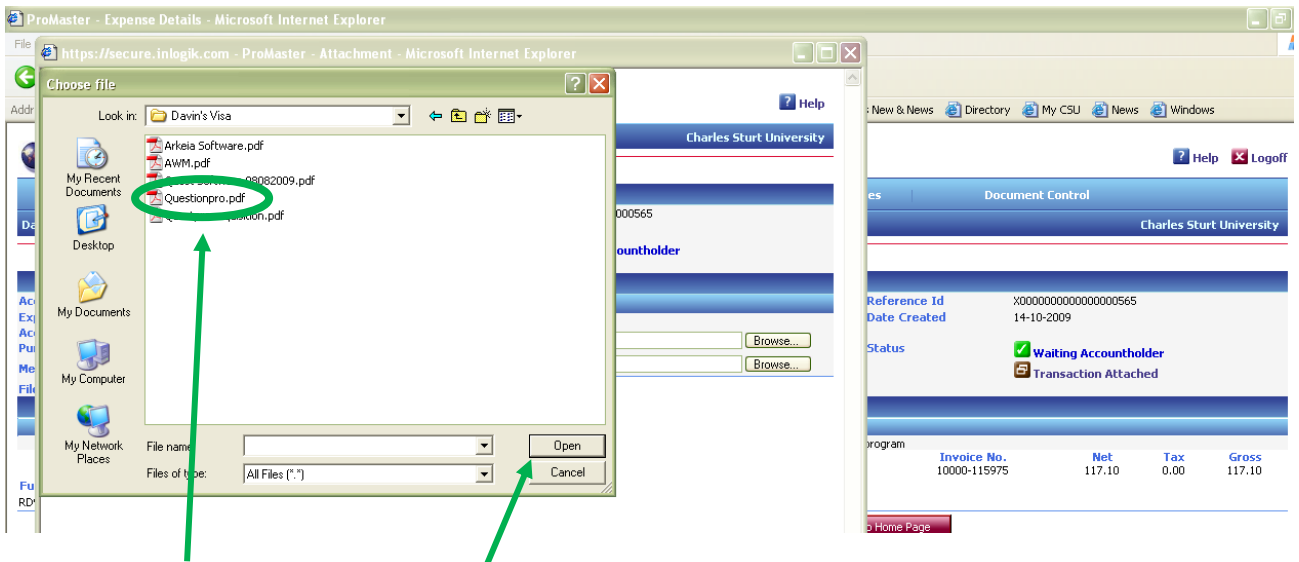
From your transaction screen, select the  for the transaction you want to attach the file to.



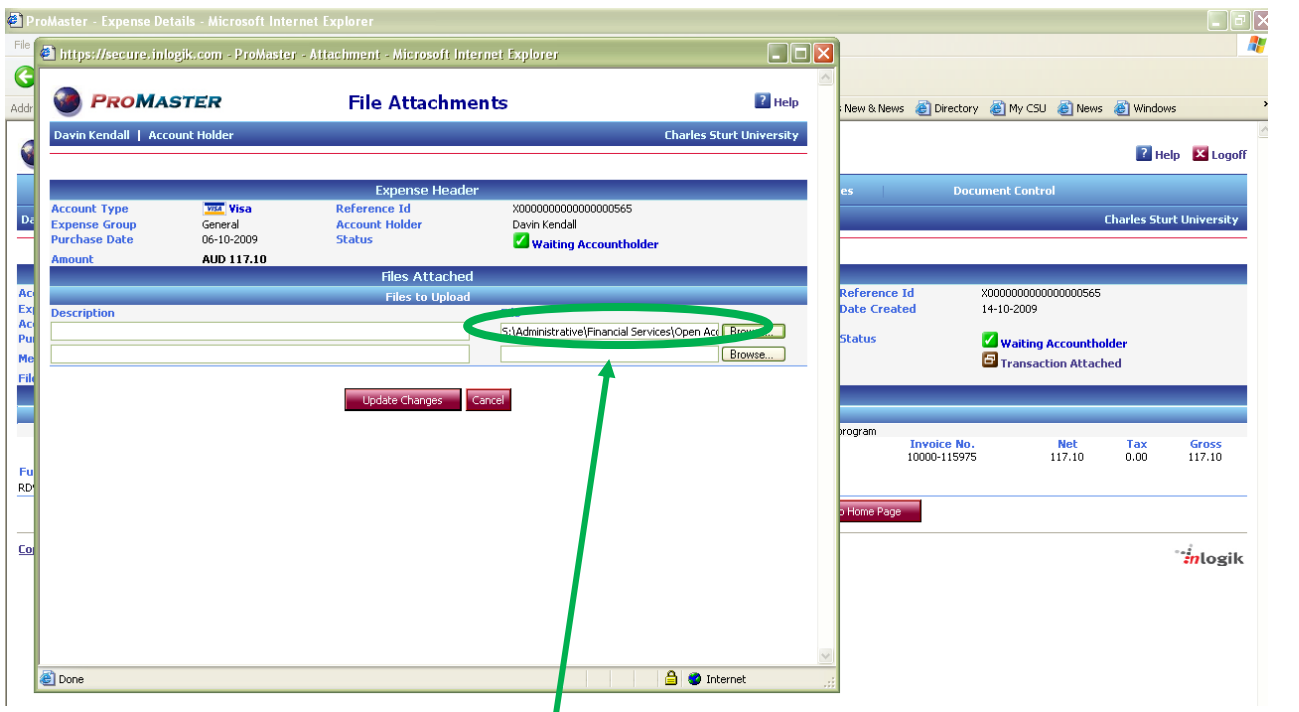
This brings up the following screen.



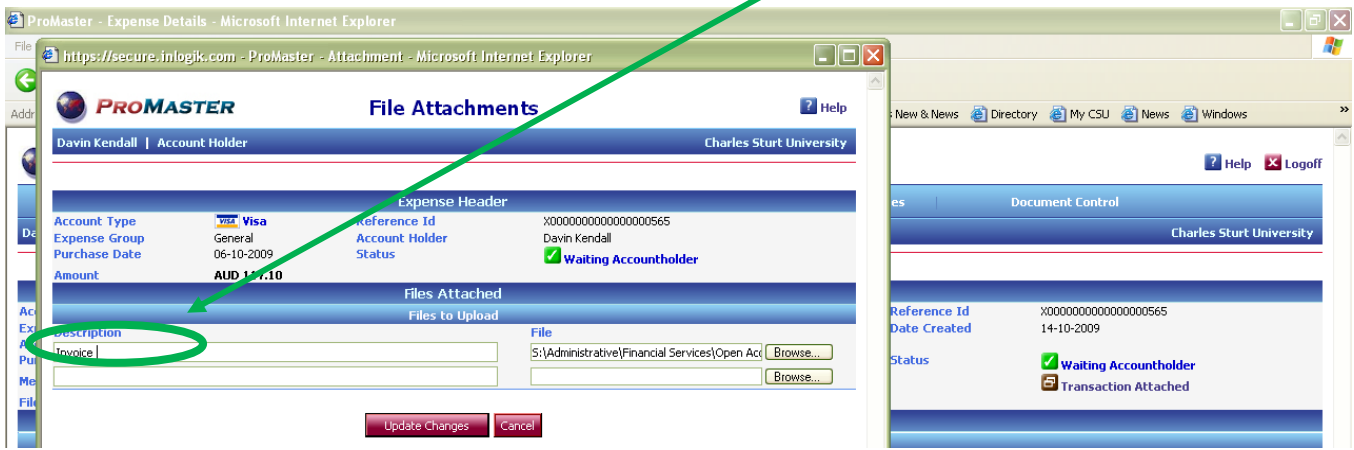
Click on "Browse" and locate your scanned documents.



Select your file and then click open

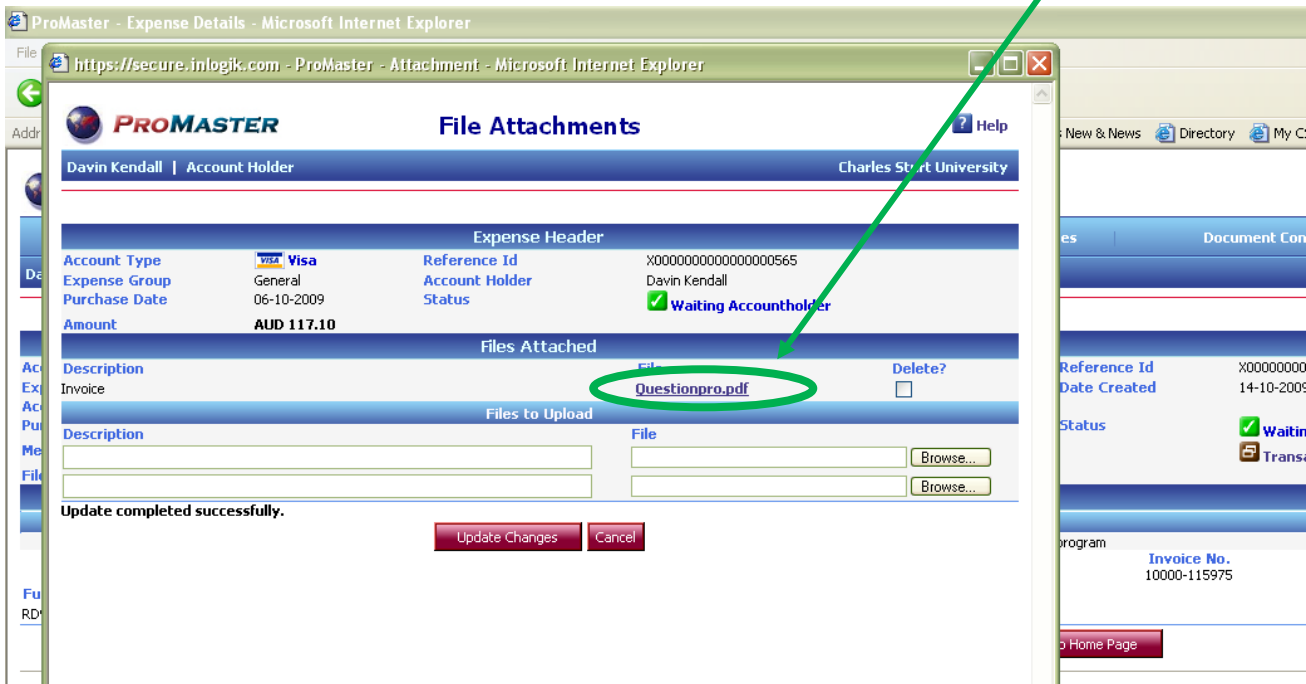


This will bring the file name into Promaster. Type in a description of the attachment Eg. Tax invoice & Requisition



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.

