SUPPORT DOCUMENT

Document Attachments



Document Attachments



Contents

Overview	
Masterfile Level	
Customer, Vendor, Projects and General Ledger Accounts	
Inventory Masterfile Level	
Attaching at Transactional level	



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.

						C	Customer							×
	8	Number: Name:	PRO001 Protea Labo	oratory Solutions										
ſ	Customer	Informatio	n Contact	s Shipping Locatio	ns Settings	a Taxes	History Op	tional Fields	Targets	Trends	Files	Notes	Linked Customers	
	🕴 🛖 Add	🖶 Add 🏠 Extract 🔮 Eject 🗙 Delete 🔒 Encryption												
	Name			Date Modified	Туре		Size	User						
		e revel Agir		2014-03-23 6.21.34	FWI FDF		73 KB							
	Inactive	Customer				🕅 Send Ema	ail 🗿 Pre	vious Next	0				Ok Cance	el 🛛

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.

							Inventor	y Item						
	Number Mask:				V I Item Numbering Convention									
	Number:	ACER						Barcode 1:			🖾 Labels			
	Description:	ACER Projecto	or					Barcode 2:				🖄 Labe	ls	
Item Sum	imary Vendor	Pricing	Related Items	Reorder	Taxes	History	BOM Files	Optional Fields	Ext Description	Notes	Statistics	Targets	Trends	Activity
🛉 🐈 Add	👚 Extract 🔮	Eject 🖌 Edi	t 🥂 Email Now	X Delete	🔒 Encry	ption Atta	ich To Email With: N	one	•					
Name:	Warranty Disclain	ner.pdf			Attach To E	mail With:	None	~	Save	Cancel				
Name			Date Modified		Туре		All Sales Documents Sales Invoices Only	h On						
Warranty	Disclaimer.pdf		2014-09-19 12:0	7:20 PM	PDF		sales Orders Only							
Inactive														OK Cancel

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

© 6	50	the impact of the impa	7 10 - 0
FILE	MESSAGE	E INSERT OPTIONS FORMATIENT REVEW	
III) Paste	X, Cut. I∰ Copy ♂ Format Pai	Image: Second Secon	
0	lipboard	G BasicTent G Names Include Tags G Zoom	
	From -	tuhepo@palladium.co.za	
	10	Info@dynamix.co.26	
sena	Ct		
	Bos		
	Subject	Invoice IN-00000005 from Sample Company	
	Attached	The Sample Company, IN-000000005 and Eds. KB: The Warranty Disclamer and ED9. KB	

Document Attachments



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.

ē					Purchase Invoi	ice			-	
File Edit View N New 🏥 Open Payment: On Account	lavigate Po 》 🐴 Adj + 🔐 Docu	urchases R just 🛅 Retu iment Info 🗍	eport m 📩 Convert 🚛 [M Additional Costs 🔒	📰 💼 🗐 🤐 Centers 🍙	Project 🗎 Attac	h Files (1) §⊟ Lines	🎯 Capture 🔂 La	bels 📄 P	rint • 1	📓 🍇 👹
Vendor:			Ship To:	PUR	CHASE INV	OICE				
TST001		60	<< Default >>	¥		Outstanding Invoices:	R 13.68 Doc 1	lumber:	P1-00000043	1
Abercrombie Hardware 65 Arrow Street					File Browser		- 🗆 ×	red:	Friday ,	May v
UK		Transaction T	ype: Purchase	Invoice 🗸				ence #:		
		Transaction N	lumber: N/A					Inv#:		
		Attached Do	cuments:							
Document Items Number Local AppleMac DEFA	tion E	Warranty Discl	aimer				2	Item Enqu	uiries 🚟 V	'iew Images
						Add File(s) Email	OK Cancel			
Status:		¥	Copied / Converted E	Document Reference			Subtotal:		•	2,000.00
Department: - None -		~	Reference:				Discount %	: 🗘 0.	.00	0.00
Terms: 30 Days F	rom Invoice	~	Customer Name:				Tax		÷	280.00
			Additional Info:				Total:		÷	2,280.00
↓\$ Combined Transaction	👻 🚨 Copy	Purchase Doc	uments +						😭 Sampl	e Company