



Attaching Documents

Introduction:

Marlin GTX (Release 3.3.1) adds the ability to scan and attach documents into the GTX databases for later retrieval. Specifically, documents can be attached to:

- Customers;
- Suppliers;
- Tracker Items;
- Customer Transactions (Invoices; Work Orders; Receipts).
- Supplier Transactions (Invoices; Payments).

Documents can be attached to customer or supplier transactions both during and after transaction entry, or can be scanned into the Attachment Manager and left unattached until a later date.

Customers & Suppliers:

On your Customers and Suppliers lists you will see a new column with a paper clip symbol header. This column displays the number of documents attached to each customer or supplier.

Code (All)	Name	Contact Name	Telephone	Mobile	
1	CASH SALE				
AGC	AGC FINANCE				
AJIND	AJ INDUSTRIES	Colin Harris	03 5555 3962	0444 293 281	1
AMEX	AMERICAN EXPRESS				
BRACKS	BRACKS AUTOMOTIVE	Gerry Bracks	03 5555 9912	0444 293 001	
CHAPAI	CHASE PAINTS	Peter Chase	03 5555 1210	0444 293 333	
CUSTA	CUSTOMER A	Stephen Jones	03 5555 1212	0455 500 555	1
CLISTR	CLUSTOMER B	Andrea Manton	03 5555 8989	0400 444 444	

Open a customer or supplier and then select the 'Attachments' tab to view or add attachments.

Date	Time	Description
05/02/13	11:31a	Test attachment

Customer & Supplier Transactions:

Selecting the **'Transactions'** tab (or 'Last Year Transactions' tab) on your Customers or Suppliers lists also displays attachments to particular transactions.

View Customer AJIND (AJ INDUSTRIES)

Details Options Documents **Transactions** Last Year Transactions Consignment Transactions Consignment Summary Contract Statistics Notes Paym

Transaction Headers

Date	Our Reference	Their Reference	Transaction Type	Amount	Balance	Age	U	Description
26/11/2010	I000031	92346	Invoice	999.00	999.00	26		
29/11/2010	I000041		Invoice	955.00	955.00	26		
18/01/2013	I000057		Invoice	75.00	75.00	01	1	

Selecting a transaction and then clicking on the **'View Header Line Details'** icon (or pressing F2) displays a popup with an **Attachments** tab for viewing or adding attachments.

Details for Invoice 57

Details **Attachments**

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Date	Time	Description
18/01/13	02:24p	test attachment on customer invoice

Tracker Items (Vehicles, Owners, Transactions):

Select the Vehicle or Owner in Tracker and then highlight the appropriate transaction and select the **'Attachments'** tab to view or add documents to that transaction.

The **'Display'** button and paper clip icon are used to display or add attachments to the selected Vehicle or Owner.

AutoTracker Enquiry

Vehicle Details **Owner Details**

Vehicle: Ford Falcon

Registration No. ACE123

Odometer

Rego Date 03/04

Vehicle Year 2005

1 attachment

Display


Transactions

Date	Reference	Amount	Registration No.	Next C'tact
13/10/2010	I000001	325.00	ACE123	
09/11/2010	I000012	775.00	ACE123	
09/11/2010	I000016	440.00	ACE123	
10/11/2010	I000023	388.00	ACE123	
02/08/2011	I000046	75.00	ACE123	

Attachments (1)

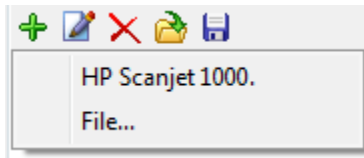
Date	Time	Description
05/02/13	02:42p	Specifications

Using the Attachments Toolbar:

Screens that deal with attachments display the Attachments Toolbar: .

Add a new attachment

This icon will display the potential sources of the document.



If the document is already in electronic format, select '**File**' to open the Windows file browser, select the file and click on the Open button. You will then be prompted to key in a Description to be displayed alongside the attachment in GTX.

Note: the '**File**' option is automatically selected for you if you have no scanner attached.

If you have a document scanner attached to your PC, it will show up as an option (eg. the HP Scanjet 1000 in the picture above). Select it, feed the paper document into the scanner and click on the Scan button (procedures may vary for different scanner types). Once scanned, you will be prompted to enter a description.

Edit attachment description

This icon will pop up the current Description for the selected attachment and allow you to amend it.

Delete attachment

This icon will ask you to confirm that you wish to delete the selected attachment before deleting it.

Open attachment

This icon will display the selected attachment on screen in the program that was used to create the file (or another program that is able to display that file type).

Save attachment to disk

This icon will open the Windows file browser and enable you to choose the location and file name for a copy of the selected attachment. This will enable you to email the document for example.

Using the Attachment Manager:

Select **Tools | Attachment Manager** from the menu toolbar to open the Attachment Manager. It is a “holding bay”, enabling you to load documents into Marlin GTX without attaching them to anything. The same screen allows you to process and attach the documents later.

This may be useful, for instance, if the manager wishes to load utilities invoices when they are received, then have the bookkeeper process and attach them later.

Attachment Manager

Unallocated Attachments

+ [Icons]

Date	Time	Description
31/01/13	02:47p	Phone Bill
06/02/13	08:44a	Power Bill
06/02/13	08:52a	Store ute rego.

Attachment Details

Attach To Customer Customer Code

Customer Transaction Transaction Type Reference

Supplier Supplier Code

Supplier Transaction Transaction Type Reference

Tracker Customer Name

Service Item Registration No.

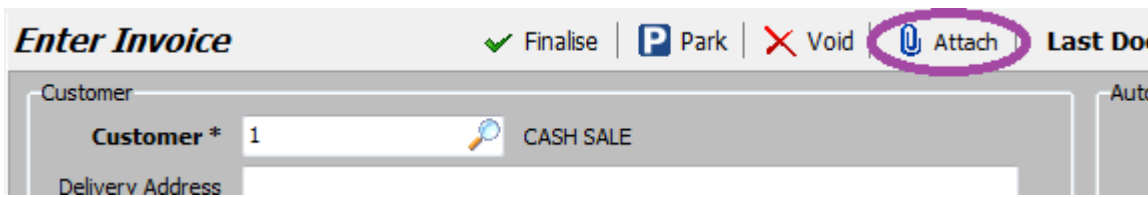
Navigator **Attachment Manager**

Use the Attachments Toolbar (covered earlier in this guide) at the top to add and manipulate documents without attaching them to anything.

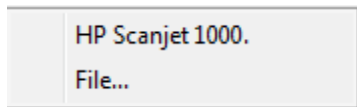
To attach a document, select it in the top section and then select the object to which you would like to attach it. Irrelevant fields will then be greyed out, leaving you to enter or select only the information required to perform the attachment. Once done, click on the **Attach** button to complete the attachment.

Adding attachments during transaction entry:

Before finalising the transaction, click on the **Attach** icon at the top of screen.



A list of the attachment methods will then be displayed.



If the document is already in electronic format, select '**File**' to open the Windows file browser, select the file and click on the Open button.

If you have a document scanner attached to your PC, it will show up as an option (eg. the HP Scanjet 1000 in the picture above). Select it, feed the paper document into the scanner and click on the Scan button (procedures may vary for different scanner types).

Once the document is selected or scanned in, you will be prompted to key in a description that will be displayed alongside the attachment in GTX.