

Adding an attachment

1. After Checking Funds, move the cursor to the Journal name field and then click on the paper clip

The screenshot shows the 'Journal Entry' form. The 'Journal' field is highlighted with a red circle. A red circle around the paper clip icon in the toolbar indicates the next step. The form includes fields for Description, Ledger, Period, Balance Type, Clearing Company, Conversion, Currency, Date, Type, Rate, and Status. The 'Lines' tab is selected, showing a table with columns for Line, Account, Debit (USD), Credit (USD), and Description.

Line	Account	Debit (USD)	Credit (USD)	Description
10	400-4000-4-565018-5220-2816-3814		999.00	REASON FOR ENTERING THIS JOURNAL
20	400-4000-1-000000-5220-7000-0000	999.00		REASON FOR ENTERING THIS JOURNAL

2. In the pop-up window enter "Journal" in the Category field and then click the "Source" tab.

The screenshot shows the 'Attachments' pop-up window. The 'Source' tab is selected, and the 'Category' field is highlighted with a red circle containing the text 'Journal'. The window includes a table with columns for Seq, Category, Title, Description, and May Be Changed. Below the table are buttons for 'Open Document...', 'Include Related Documents', 'Publish to Catalog', and 'Document Catalog...'.

Seq	Category	Title	Description	May Be Changed
10	Journal			<input checked="" type="checkbox"/>

3. A new tab will open in your browser window. Use the browse button to locate the file to be uploaded, then click submit.

The screenshot shows the 'File Upload' dialog box. The 'Browse...' button is highlighted with a red circle, and the 'Submit' button is also highlighted with a red circle. The dialog box includes a text field for the upload file name, which contains '_SummaryRPT100.docx'. Below the text field are buttons for 'Submit', 'Cancel', and 'Clear'.

4. Return to the Attachment Form in the application and click Yes to confirm the upload. Be sure to Reserve Funds.

The screenshot shows the 'Attachments' pop-up window with a 'Decision' dialog box overlaid. The 'Yes' button in the decision dialog is highlighted with a red circle. The decision dialog asks 'Has the file been uploaded successfully?' and has 'Yes' and 'No' buttons.