

Using Document Attach Extensions

Last updated: August 26, 2022

The "Document Attach Extensions" application hooks onto the existing functionality for Document Attach. To access the drag and drop functionality, simply open one of the "Document Attach Management" windows. They are accessible from most of the main maintenance windows in GP.

Here is an example from the GL Transaction Entry window:

Transaction Entry sa Fabrikam, Inc. 12/04/2027

File Edit Tools View Additional Help Debug

Save Delete Void Post Correct Copy Paste

Journal Entry 3,340 ☐ Intercompany Batch ID RMCSH00000011

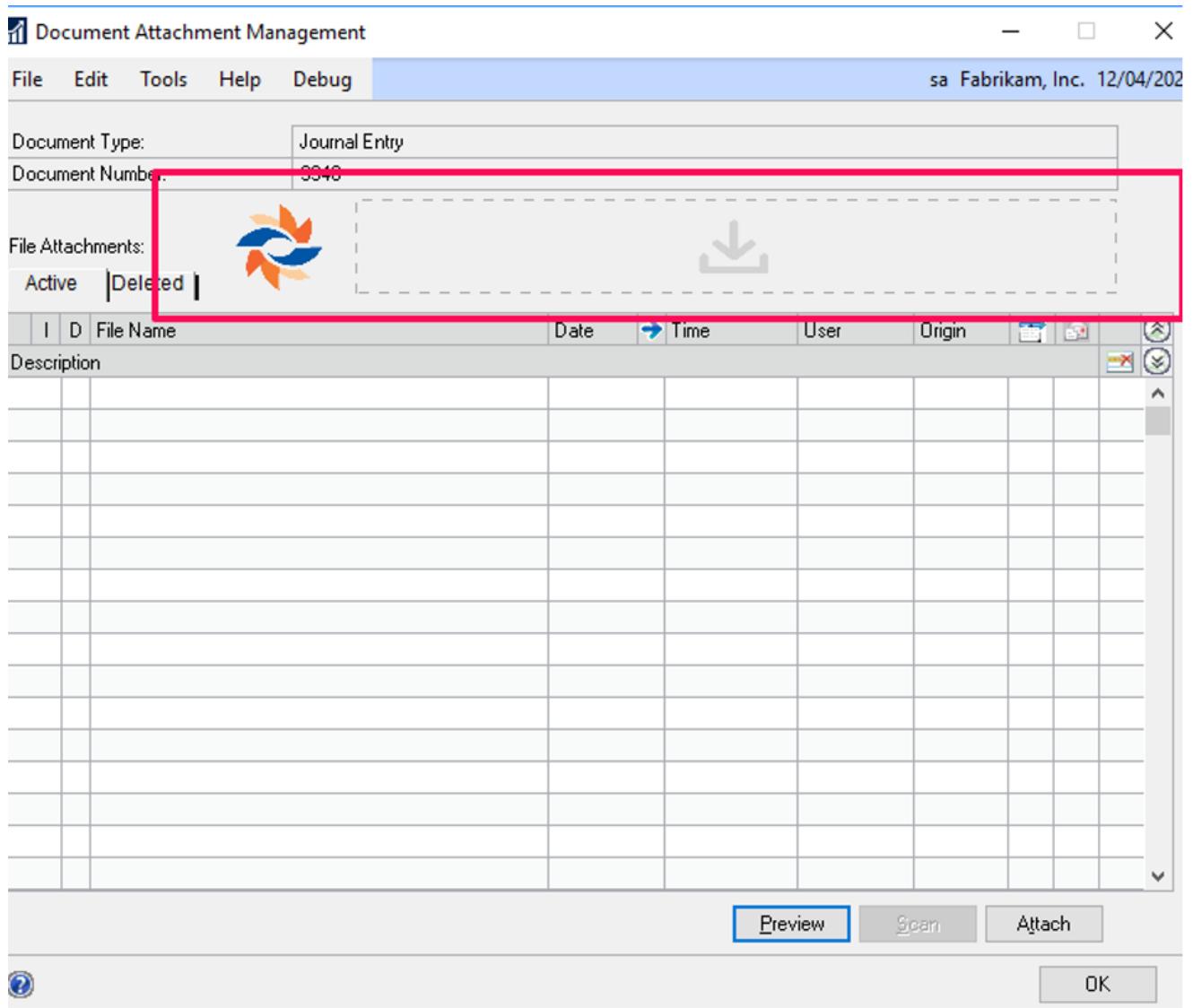
Transaction Type: ☒ Standard ☐ Reversing Transaction Date 12/04/2027 Reversing Date 00/00/0000

Source Document CRJ Reference Receivables Cash Receipts Currency ID Z-US\$

Co. ID	Account	IC	Debit	Credit
Description			Exchange Rate	
Distribution Reference			Corresp Co. ID	
TWO	000 -1100 -00		\$375.00	\$0.00
TWO	000 -1200 -00		\$0.00	\$375.00
	- -		\$0.00	\$0.00
Total			\$375.00	\$375.00
Tax Entry			Difference	\$0.00

by Batch ID Status Unposted

That will take you to the Document Attachment Management window where you can see the new drag and drop area:



All that needs to be done is to drag a file onto the area and it will be attached to the document. For example, if you have an email with an attachment on it that needs to be put into document attach, drag the file from the email client on to the highlighted area. Files can be picked up from the computer pretty much anywhere and dropped into the drag and drop area e.g. Browser download, Desktop, Windows Explorer etc.

Once the file is attached it will be displayed in the main windows as per below:

