Tips & Tricks

Written by the firm's resident super user, Victoria, Accredo's user tips provide helpful information, short-cuts and general pointers to help customers improve their use of Accredo.

Adding Links and Memos to Documents and Transactions

Accredo users will be already familiar with adding Links and Memos to masterfiles such as Customers and Products. Release 3.5 users can now add them to Documents and Transactions. Use Links to attach files or web links, Memos for recording notes or reminders.

In the example below, I will demonstrate saving a pdf copy of invoice emailed to you by a creditor against the Invoice transaction in Accredo.

First copy the attachment. Open the email and right click on the invoice and click Copy.

| Reply Reply Forward to All Respond | Invoice #2543 fr Invoice #2543 fr | rom Auckland Electrical Se Safe Lists + Block Not Junk Sender Junk E-mail | Categorize Follow Mark as Up + Unread Options | A Find Related * Select * Find Business Co |
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| From: Victoria Nealon Fo: Victoria Nealon Co Subject: Invoice #2543 : | from Auckland Electrical Services L | td | | Sent: Thu a |
| Message Invoice #2 From: Victoria Nealon Sent: Thursday, 17 Ni To: Victoria Nealon Subject: Invoice #254 E | S43.0df (37 KB) Preview Qpen Print Save As Remove Copy Select A[I | es Ltd | | |
| Hi, Thank you for your busi Your Invoice is attached | iness. d to this email. If you are havin | ng trouble opening this | document we recommend | you install <u>Adobe Rea</u> do |
| ext enter the Invoice into / asks > Accounts Payabl | Accredo. le > Enter Transactions > I | nvoice. → | | |
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Enter the Invoice details and Save. Then click the Links button or press Alt+F6. \rightarrow

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| Creditor Code | AUCKELECT | | | Aucklan | d Electrical |
| Date | 13/09/2011 | | Due Date | 20 | 0/10/2011 |
| Origination Date | | | Discount | Date 1 | 3/09/2011 |
| Invoice Number | 2 | 2543 | | | |
| Comment | | | | | |
| Rate Type | BUY | | Branch | н | 0, |

Double click the Invoice to open it and you'll see the Links button now has a red asterix indicating that there is an active Link for this Transaction.

Click the Links button or press Alt+F6 to bring up the Links on Transaction screen and double click on the lcon to open the file.