

# Exonet Tips and Tricks #4

## Linking documents to your accounts

*Do you ever have a Word document, Excel spreadsheet, digital image or any other file that is related to an account but you can't find it easily when you need it?*

It's easy to find account-related files when you link them to Exonet with the Document Manager!

To link a file to a debtor or creditor account:

- Go to Utilities > Document Manager and click New
- Browse to the file you wish to attach and click Open
- Store the file as a **link**, this way the file will not take up space in your database
  - *N.B. it is best to have the file stored on the server so that it can be accessed from any workstation on the network. Be careful **not to** move the file to a new machine or folder after you have linked it to Exonet or Exonet won't be able to find it*
- Enter the account module (e.g. DEBTORS if it is a Debtor account) and number into the required fields
- Enter reference names and/or numbers the Reference and Document Code fields so you can search for the document in the Document Manager at another time
- The document is now available for quick and easy reference from the Documents tab of the account in question:

The screenshot shows the 'Debtor Account Details' window for account 'ACCLAIM'. The 'Documents' tab is active, and an arrow points to it from the text above. The window displays the following information:

- Code:** ACCLAIM01
- Name:** ACCLAIM
- Company Details:**
  - Postal Address:** Line 1: PO Box 30526, Line 2: North Harbour, Line 3: North Shore, Line 4: Auckland
  - Postal code:** 0751
  - Delivery Address:** Line 1: Unit 4, 6-8 Omega St, Line 2: Albany, Line 3: North Shore, Line 4: Auckland
  - E-mail:** tim@acclaimgroup.co.nz
  - Phone:** 021 607 400
  - Contact name:**
- Sales:**
  - Primary Group:** CUSTOMERS
  - Secondary Group:** NO GROUP SELECTED
  - Sales person:** Exonet Administrator Account
  - Base price:** 1 Price 1
  - Turnover:** This month: \$0.00, Last month: \$0.00, This year: \$0.00, Last year: \$0.00
- Credit:**
  - Credit terms:** Cash Only
  - Credit limit:** 0
  - Aged balances:** Current: \$0.00, 1 month: \$0.00, 2 months: \$0.00, 3+ months: \$0.00, Balance: \$0.00
- Flags:**
  - Active
  - Open item
  - Stop credit
  - Account Template
  - Allow Restricted Goods
  - Private Account

The footer of the window reads 'AQUA CLEAR PRODUCTS LTD'.