

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:

Debtor Account Details

A/C No: 1 Name: ACCLAIM

Code: ACCLAI01 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 Fax:

Contact name:

Extra Fields

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

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