Adding an attachment to an AR invoice

Responsibility	**AR User, AR Supervisor, AR Manager**
Navigate	**Transactions**

Adding an attachment

Find the invoice you wish to add an attachment to.

Select the **paperclip** icon at the top of the screen and the **Attachments** window will open.

In the *Category* field select **Miscellaneous** and enter a *Title* and *Description* for the attachment.

It is important to include your two digit department code. This will also be used to find it later if you save it to the Document Catalog.

Select a relevant *Data type* by clicking into the box and clicking on the **list of values** ⋯ button which appears on the right. This will allow you to do the following:

- **File** – upload a file
- **Long Text** –text up to a maximum of 32,767 characters
- **Short Text** – text up to a maximum of 4,000 character
- **Webpage** –enter a URL for a webpage

Datatypes

Find %

Datatype
File
Long Text
Short Text
Web Page

Find   OK   Cancel
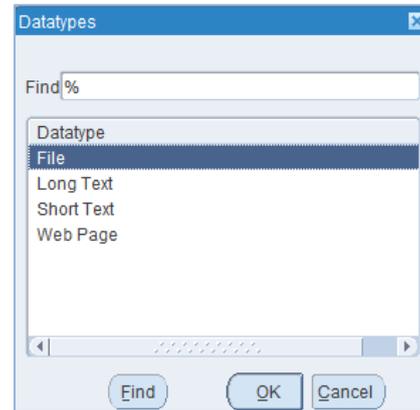
Attaching a file

If you select **File** a webpage will open allowing you to upload the chosen file.

Select **Browse** and a window will open allowing you to select the file.

When you click **Submit** a message will appear confirming the file has been uploaded successfully.

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File Upload

* Upload File [   ] Browse...

Submit   Cancel   Clear

Confirmation
1. File upload completed successfully.
2. * Please close the web browser.
3. * Return to the Attachments form and click the Yes button to indicate file upload is complete.
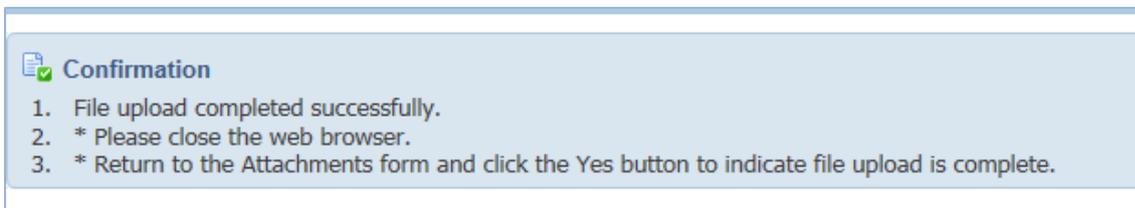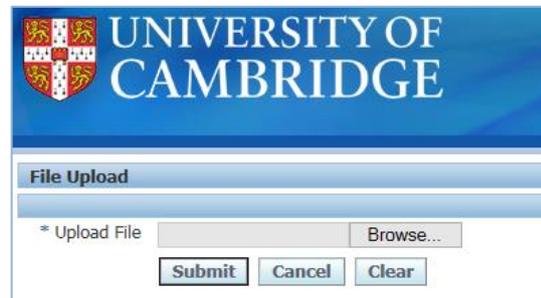
Re-open Oracle and select **Yes** to the message which has appeared.

Decision

Has the file been uploaded successfully?

Yes   No
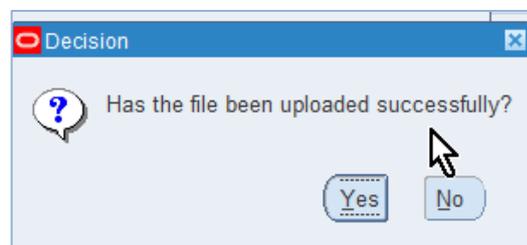
Finally, select the yellow **Save** icon 💾 at the top of the screen.

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Adding text

After selecting **Long Text** or **Short Text** the select the yellow text box below and enter the information you wish to attach.

Finally, select the yellow **Save** icon at the top of the screen.

Adding a URL

After selecting Web page the **Source** tab will automatically open. Enter the URL of the web page into the **File or URL** field

Select the yellow **Save** icon at the top of the screen.

Viewing attachments

If an item has been attached to a record then the paperclip icon will change to show it holding a piece of paper ![icon] . To see what this represents select the paperclip icon at the top of the screen.

The **attachments** screen will open.
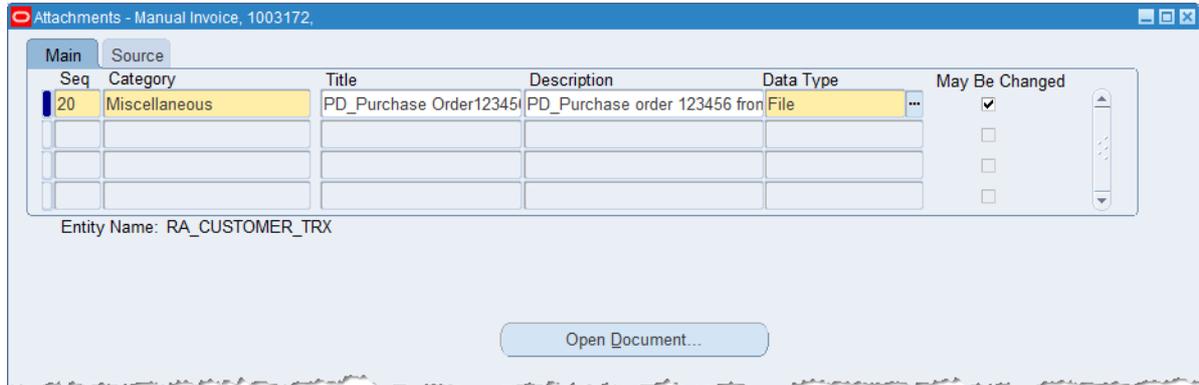
This window lists all of the documents linked to the invoice. If it relates to a file select the line and click on the **Open Document** button to open it.

Using the catalogue

The catalogue allows departments to upload their frequently used attachments so they can use them for future invoices without having to re-type/re-upload every time.

> Note: all files uploaded to the catalogue can be accessed by any department using accounts receivable – please do not upload any sensitive or personal data.

Publishing to the catalog

Select the file or text in the attachments window. Then select **Publish to Catalog**
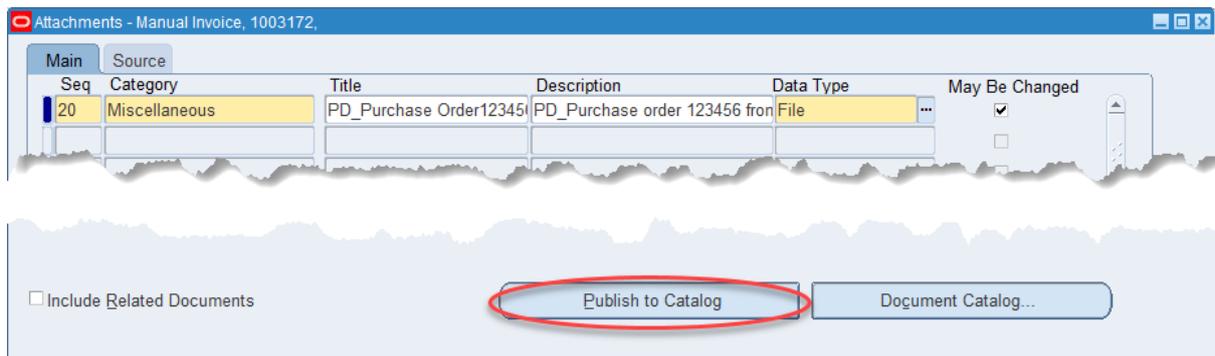
A window will pop up asking if you wish to publish the document to the catalog. Select **OK**.
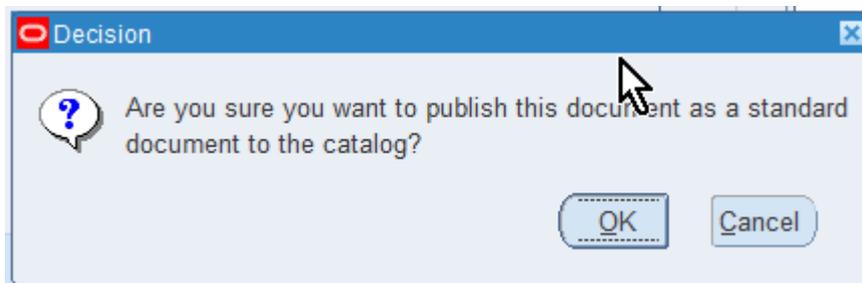
A confirmation message will let you know it has uploaded successfully.

Recalling an attachment from the catalogue

From the **Attachments** window select the **Document Catalog…** button
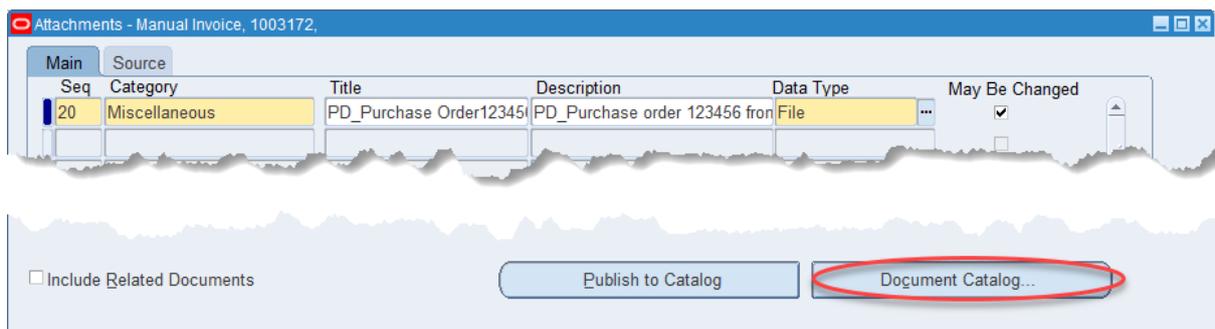
A search window will appear.

Using the fields in the search box you can narrow down the list of possible attachments. By entering **XX%** (where XX is your department code) you can narrow the list just to your department's attachments. When you select **Find** a list of possible items will appear.

Select the item you wish to attach and click **Attach 1**. The attachment has now been added to your invoice.