Attachments

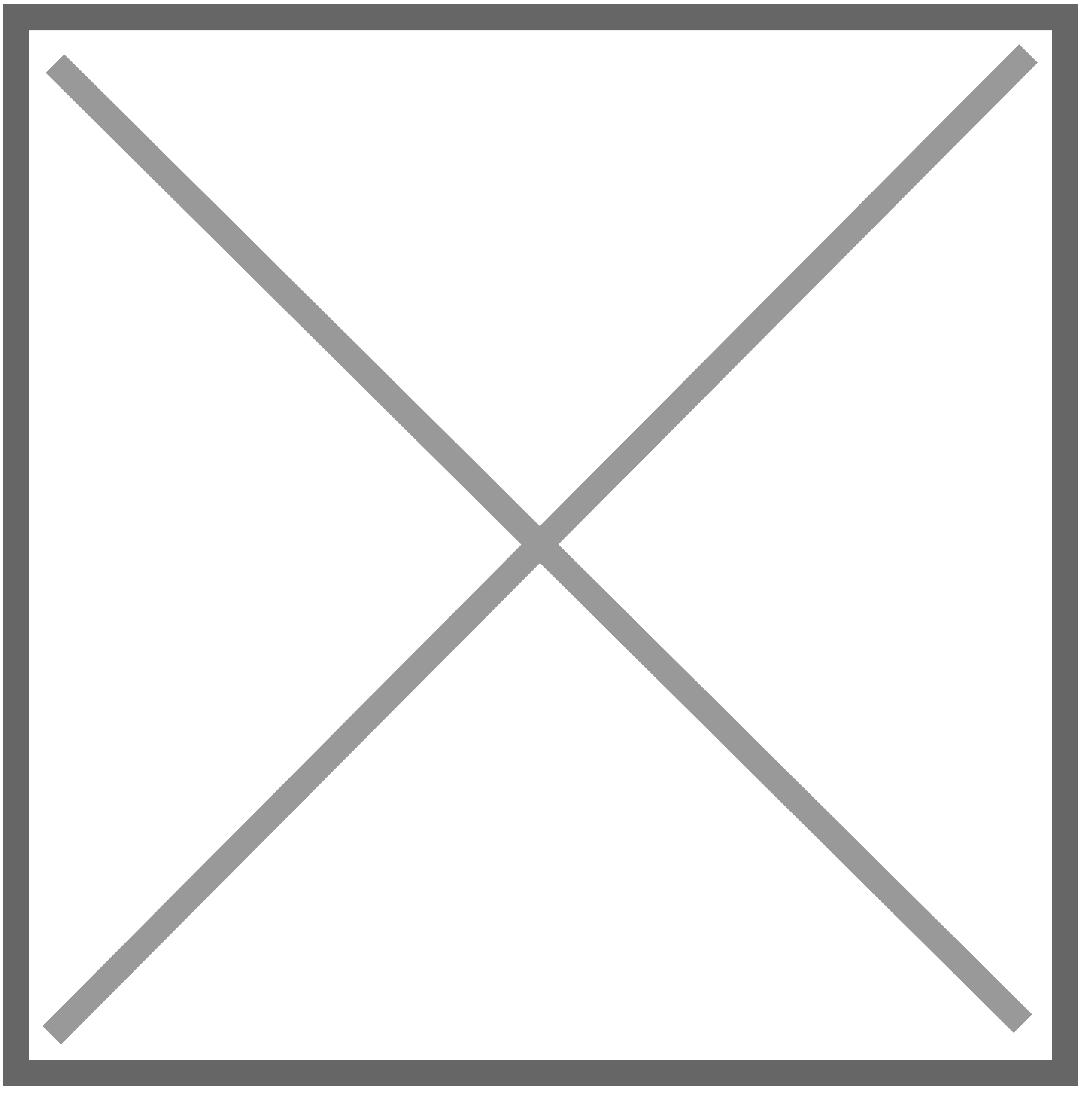
Attachments

Attachment and Linkit (hyper links)

Attachment Grid Access

The system allows for attachments and hyperlinks to be added to documents.

Everywhere in the system, there is either a button or paper clip symbol on the grid.



The grid will display a paper clip which will have different colours indicating whether there is an attachment or hyperlink or both

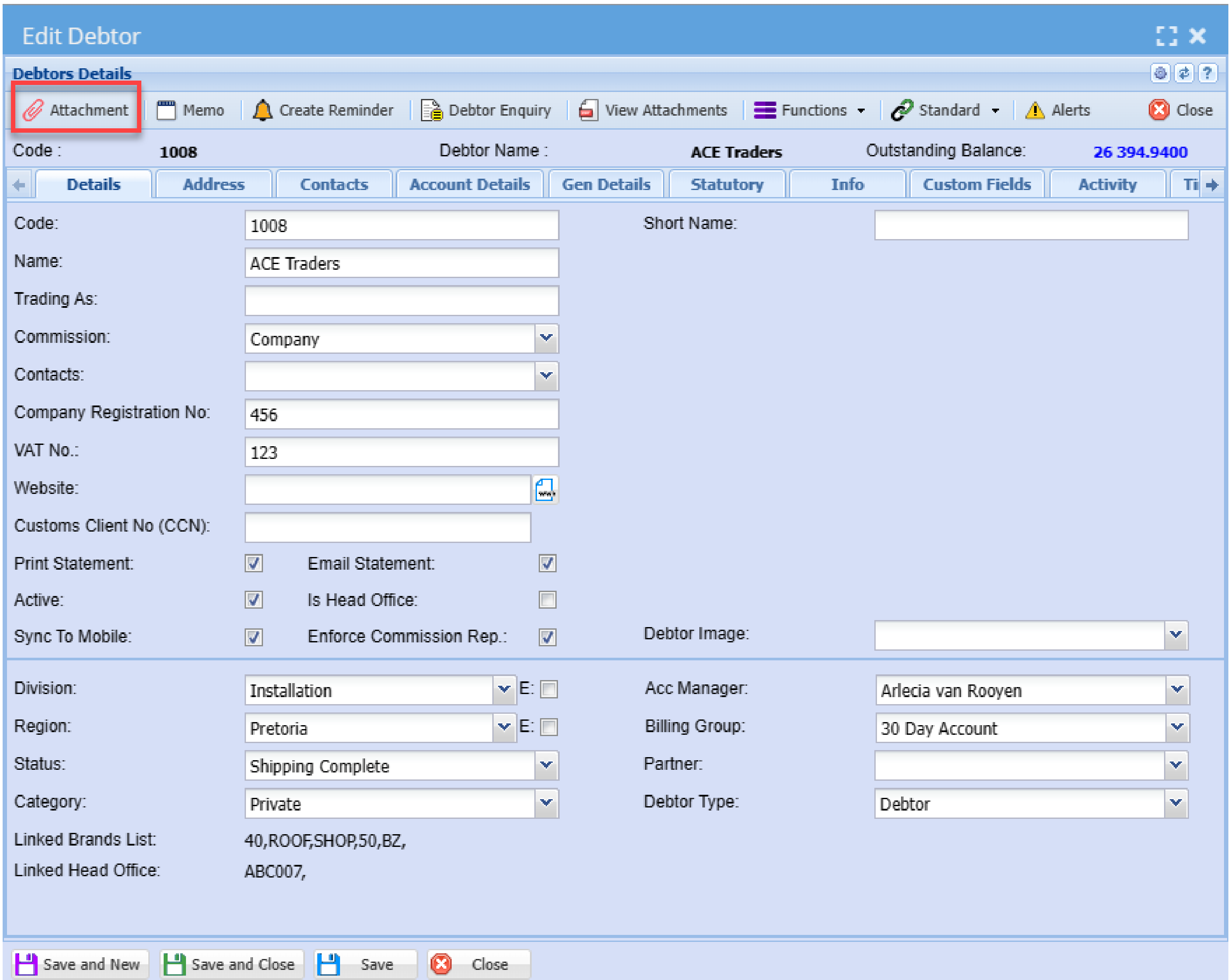
Paper clip Grey	No attachments or hyper-links
Paper clip red	attachments present
Paper clip green	hyper-links present
Paper clip blue	both attachments and hyper-links present

Attachment Button

The attachment button can be found across the system where there is a clipboard access.

It allows you to add additional information on a window that you are currently working on in the form of an attachment.

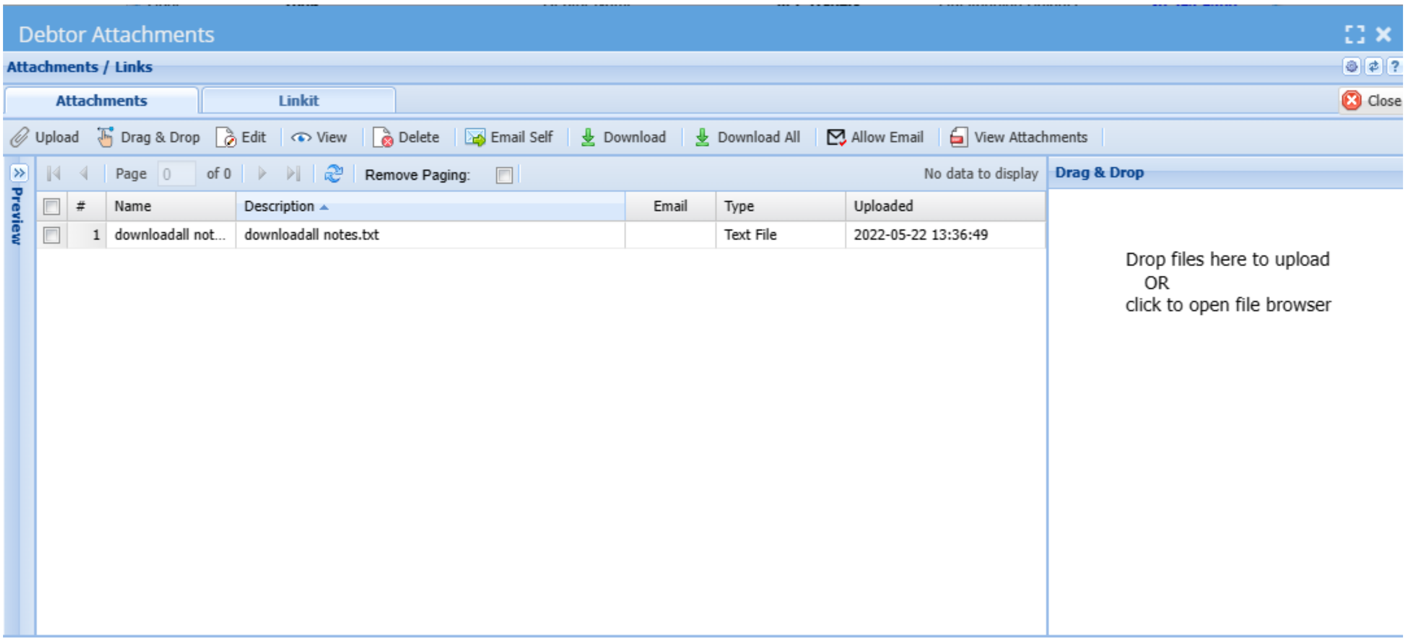
This can be additional documentation, for example, contracts, invoices from suppliers or documentation regarding a stock/ inventory item.



Attachment

After clicking the attachment on the grid or on a specific window on the system it will take you to the window below.

This is where you will be able to add an actual attachment or a hyperlink

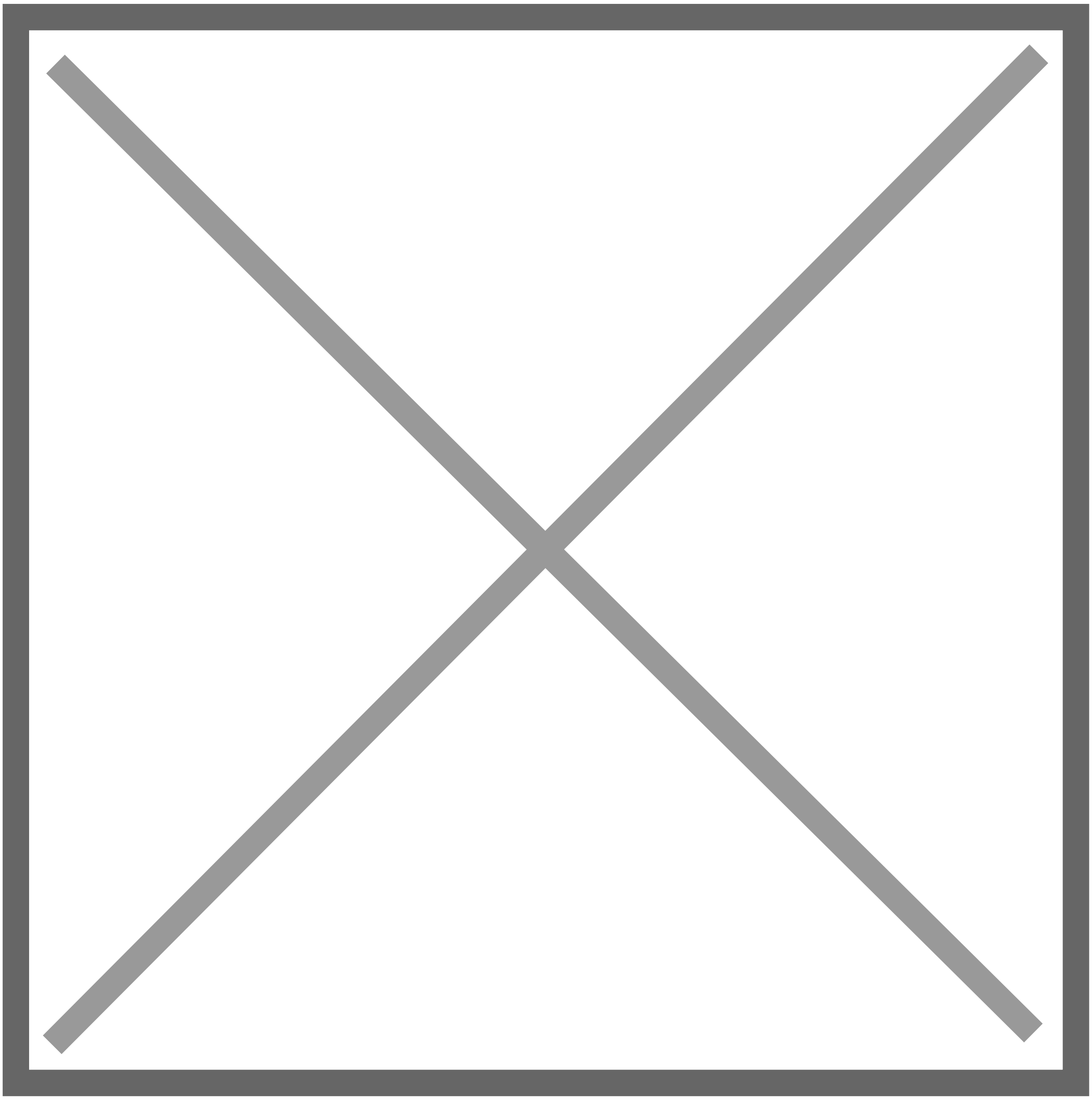


Upload	This allows you to load an image by selecting it from your computer
Drag & Drop	This function allows you to drag and drop an image where it is saved or directly from outlook
Edit	This allows you to edit image name, description or file type
View	You can click view to view an attachment
Delete	This button allows you to delete an attachment id you no longer need to see it
Email Self	This will email the attachment directly to your outlook
Download	This allows you to download the image directly to your computer
Download All	If they are multiple attachments to load you can click on download all
Allow Email	This button allows you to put a flag on the attachment to allow email or not allow email
View Attachment	View Attachment shows a preview of the attachment

Linkit (hyper-links)

This allows you to add a hyperlink to across the system.

This can be links to more information on the debtor/ customer, Creditor/Supplier or Inventory/ Stock Item or any other document accross the system



Attachment Naming

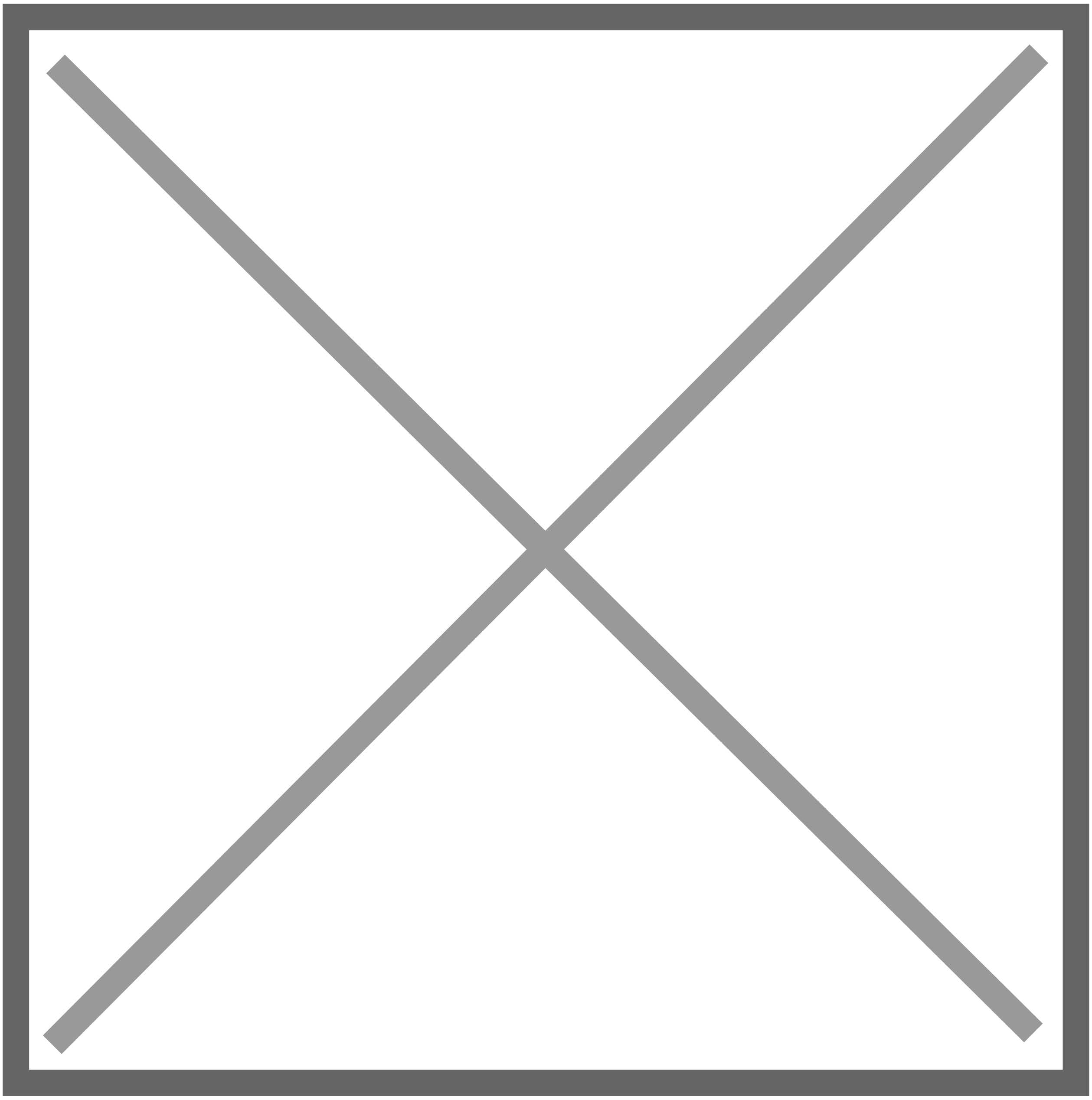
The system now allows for all attachments that are uploaded and saved into the Huge software to be named with a file based on the name that you put in and it appends the date and time that you uploaded it.

An example of a good naming conversion can be seen in the naming conversion below:

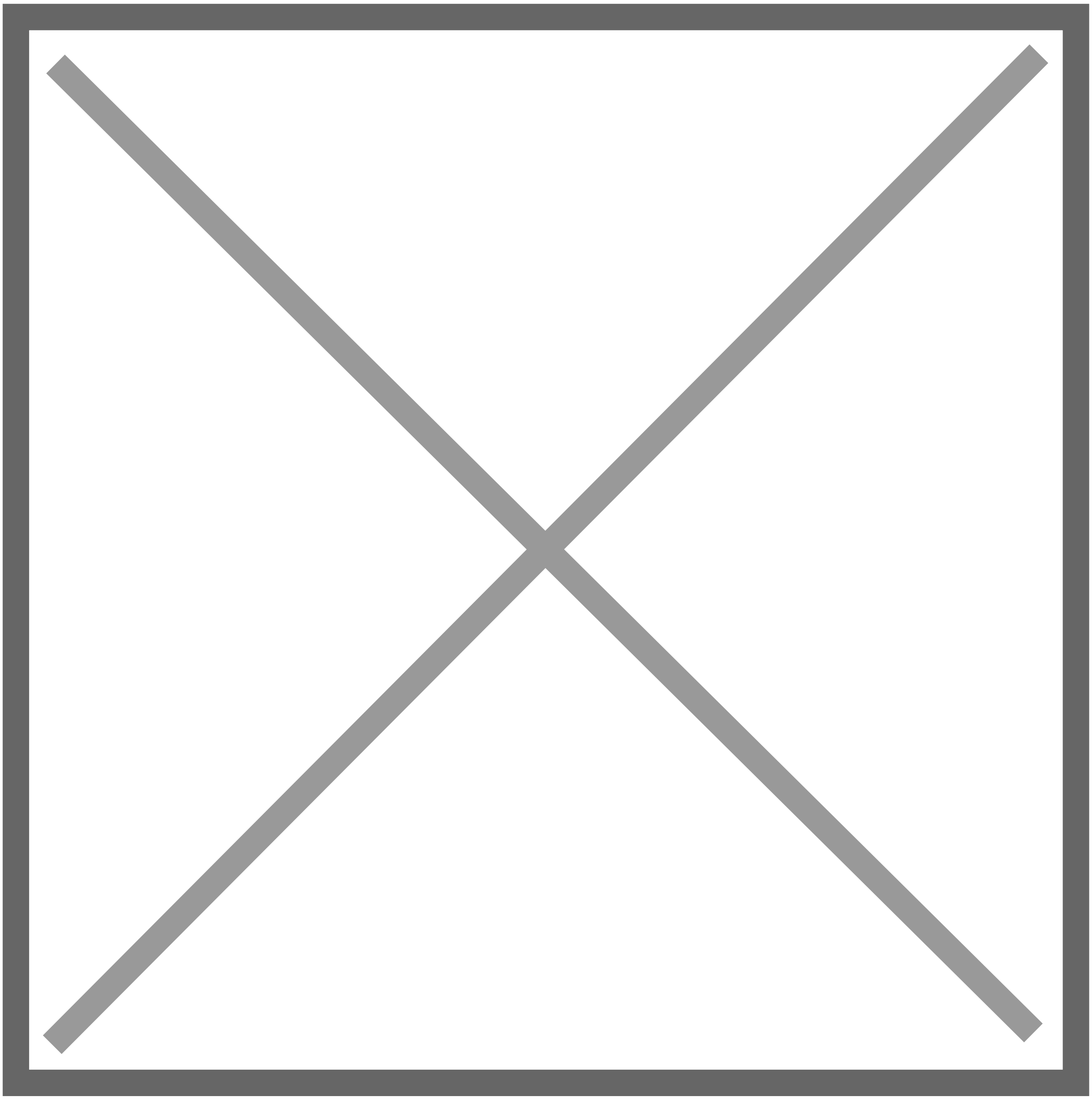
1. Short name for supplier, customer or inventory/ stock Item
2. Date of Invoice
3. Invoice Number
4. Amount

It is better to separate the file's name with an underscore than to have space.

This is because we will remove the spaces when naming the file

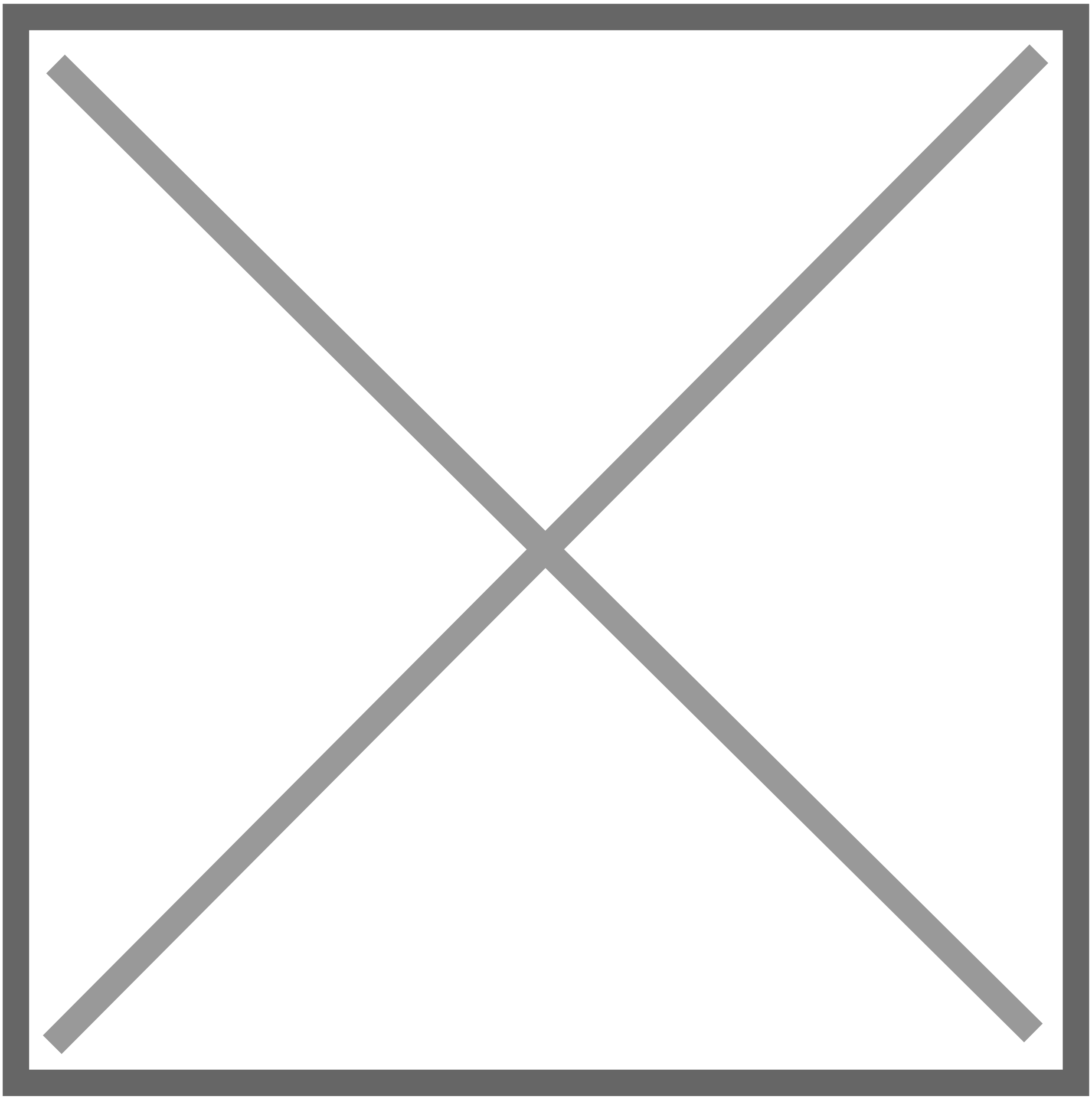


The file name matches the Name field in the attachment upload



This helps for auditing purposes and if we ever have to access the uploads folder, your naming of upload files will be there so that it will be easier to find.

For Purchase Orders and most other documents, all upload files are kept in categories eg Purchase Orders and when they were uploaded.



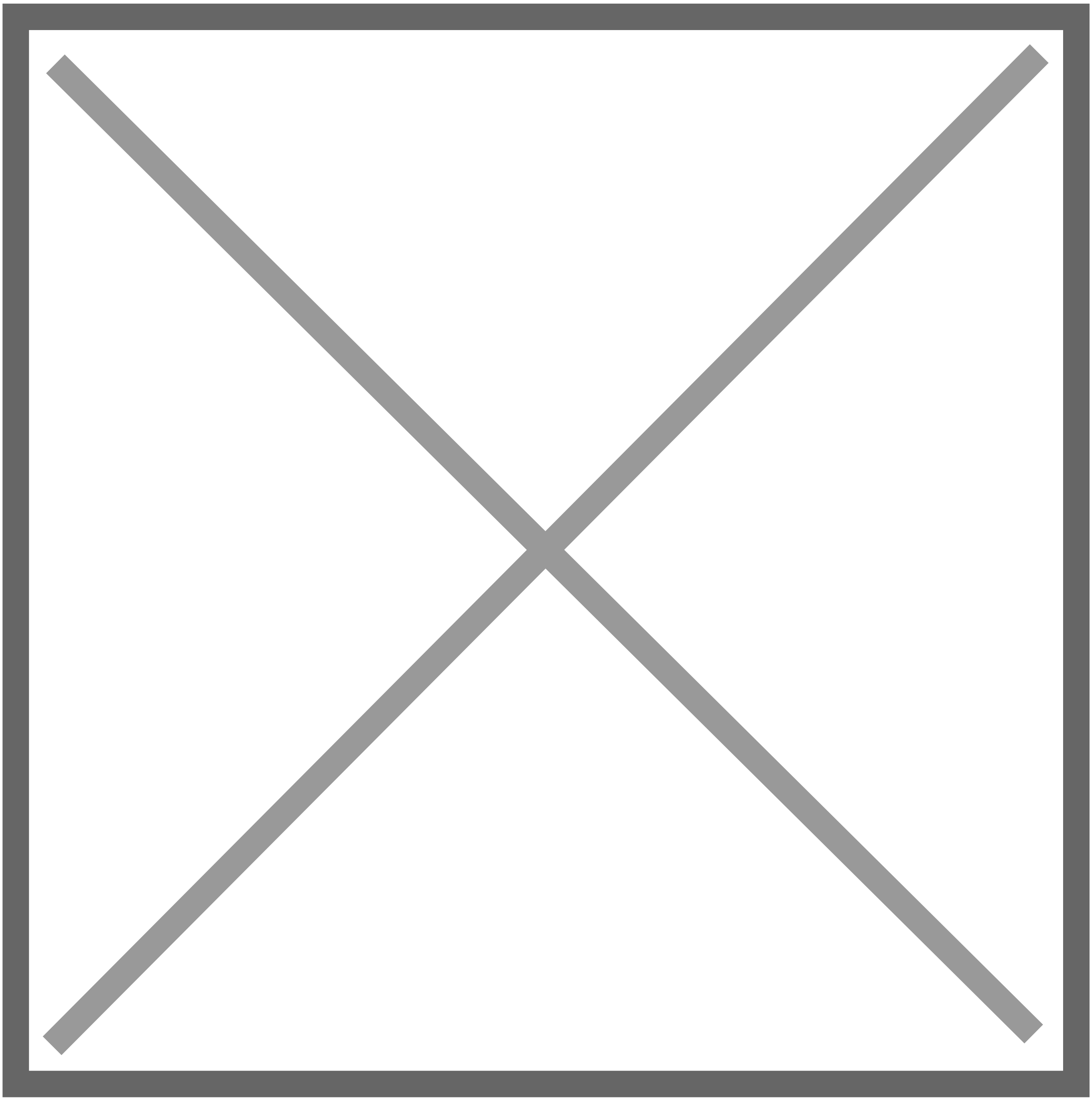
Drag and Drop on Attachment

You can now drag and drop any document into this open space to upload an attachment.

You can click in open space which will then open up the File Explorer for you to select a file.

The system will try and determine the type of file you are uploading.

Image and PDF are the most common.



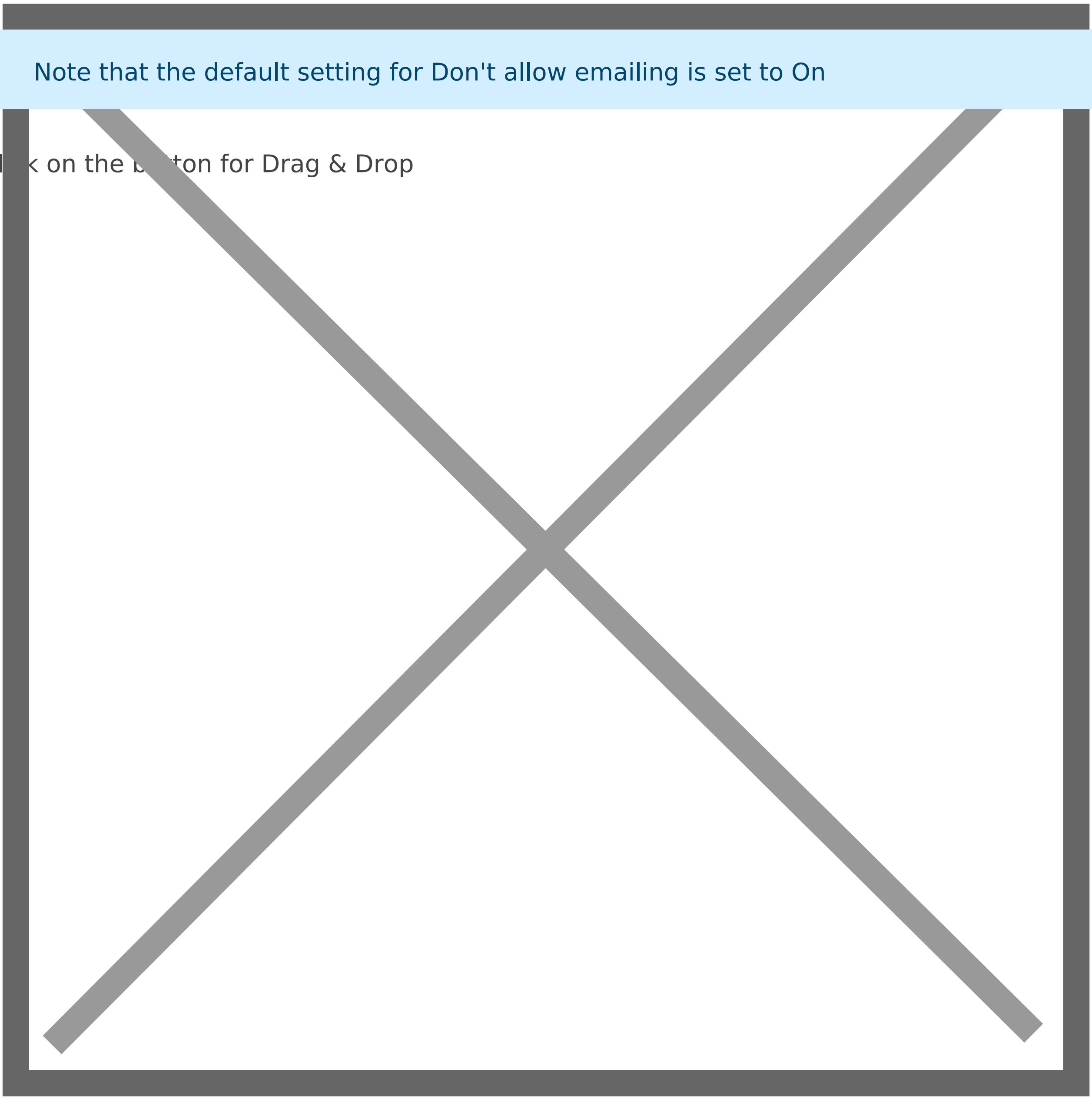
Drag and Drop Process

The system allows multiple attachments to be uploaded via the Drag & Drop function.

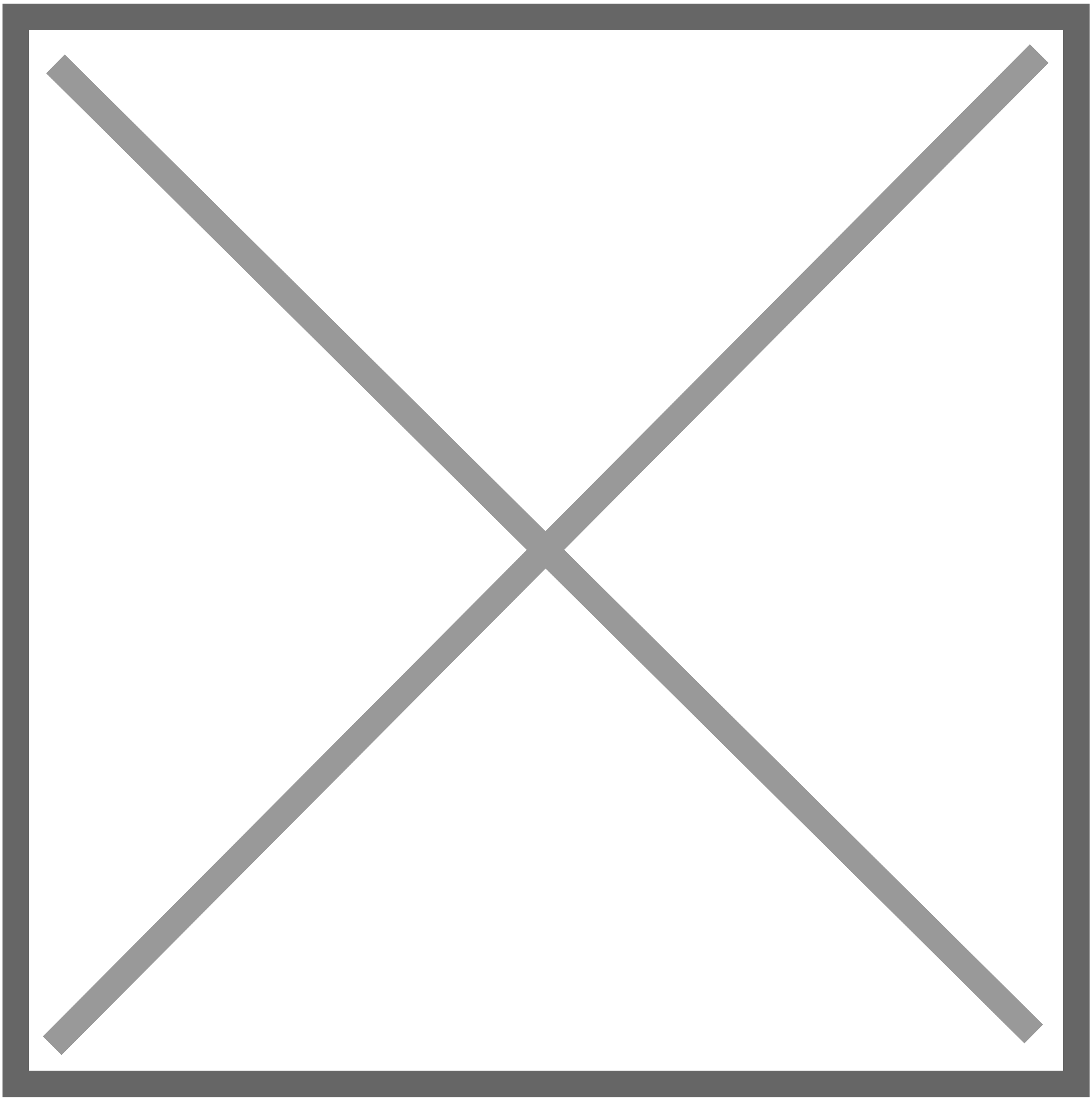
This works well with email where one can drag attachments from email to system or from anywhere the attachments are saved on the computer.

> Note that the default setting for Don't allow emailing is set to On

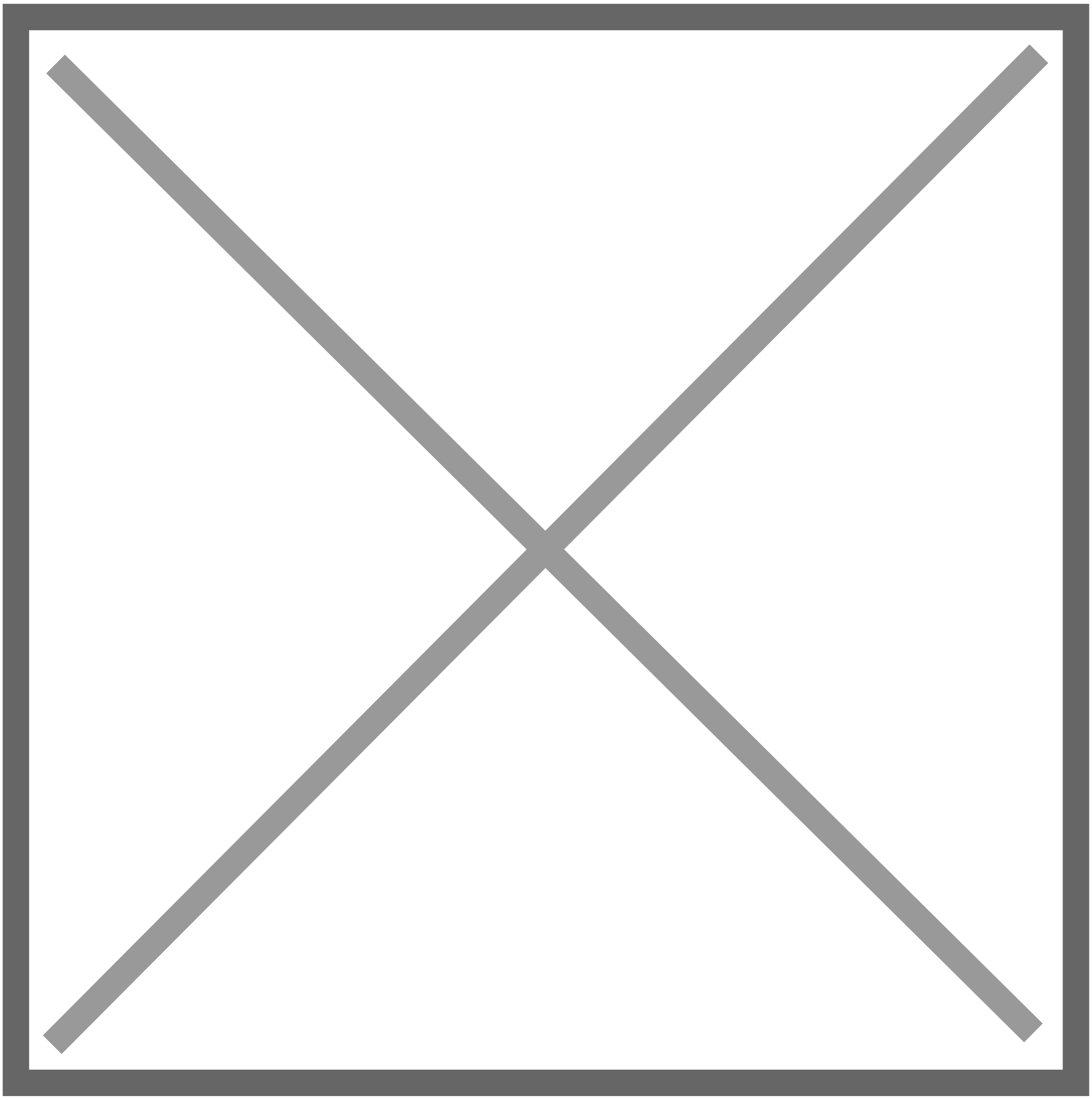
Click on the button for Drag & Drop



Select multiple files you want to upload and drag to white open window



Multiple files will be uploaded

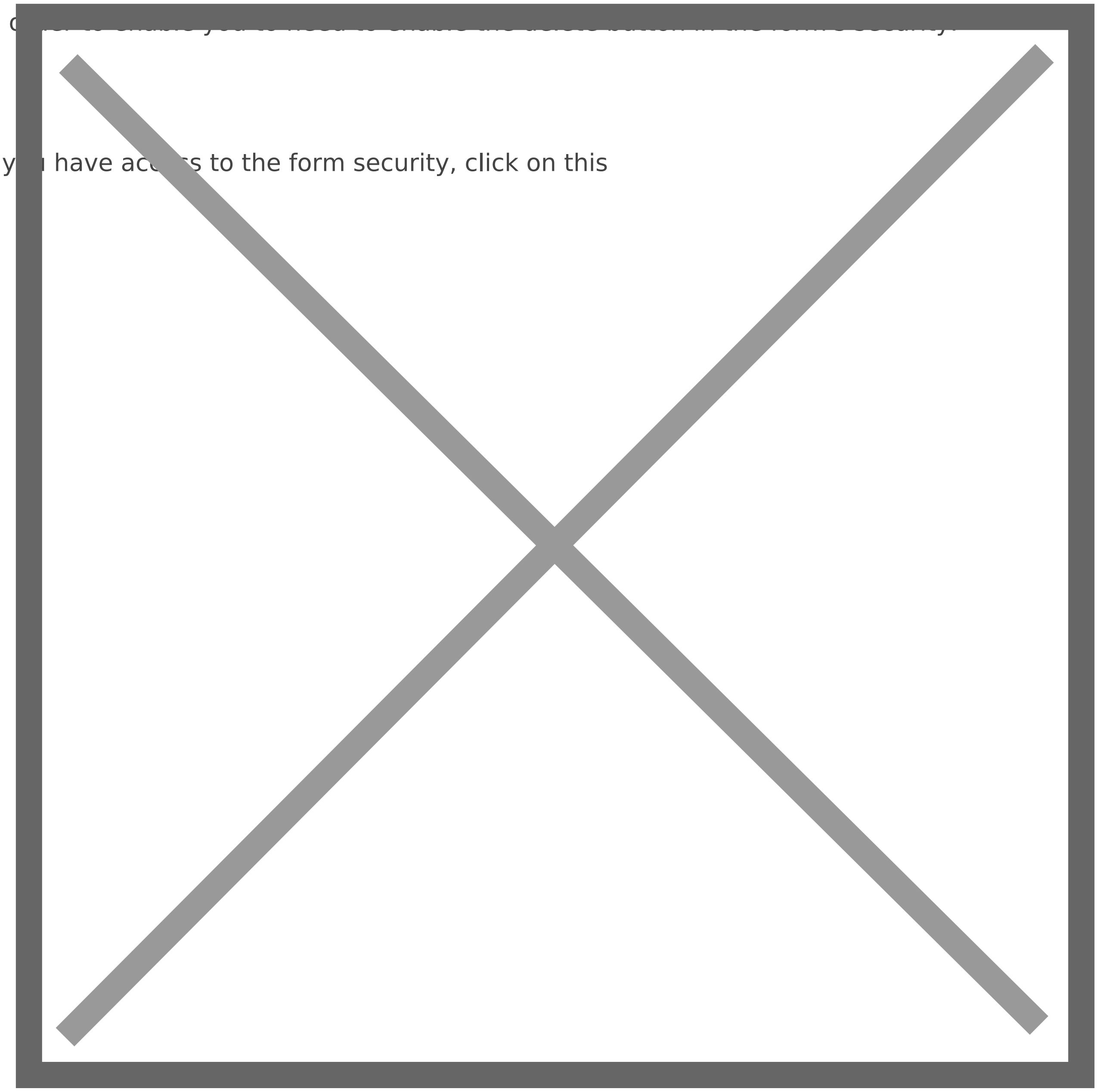


Attachment Delete Button

The attachment delete buttons are disabled by default.

In order to enable you to need to enable the delete button in the form's security.

If you have access to the form security, click on this

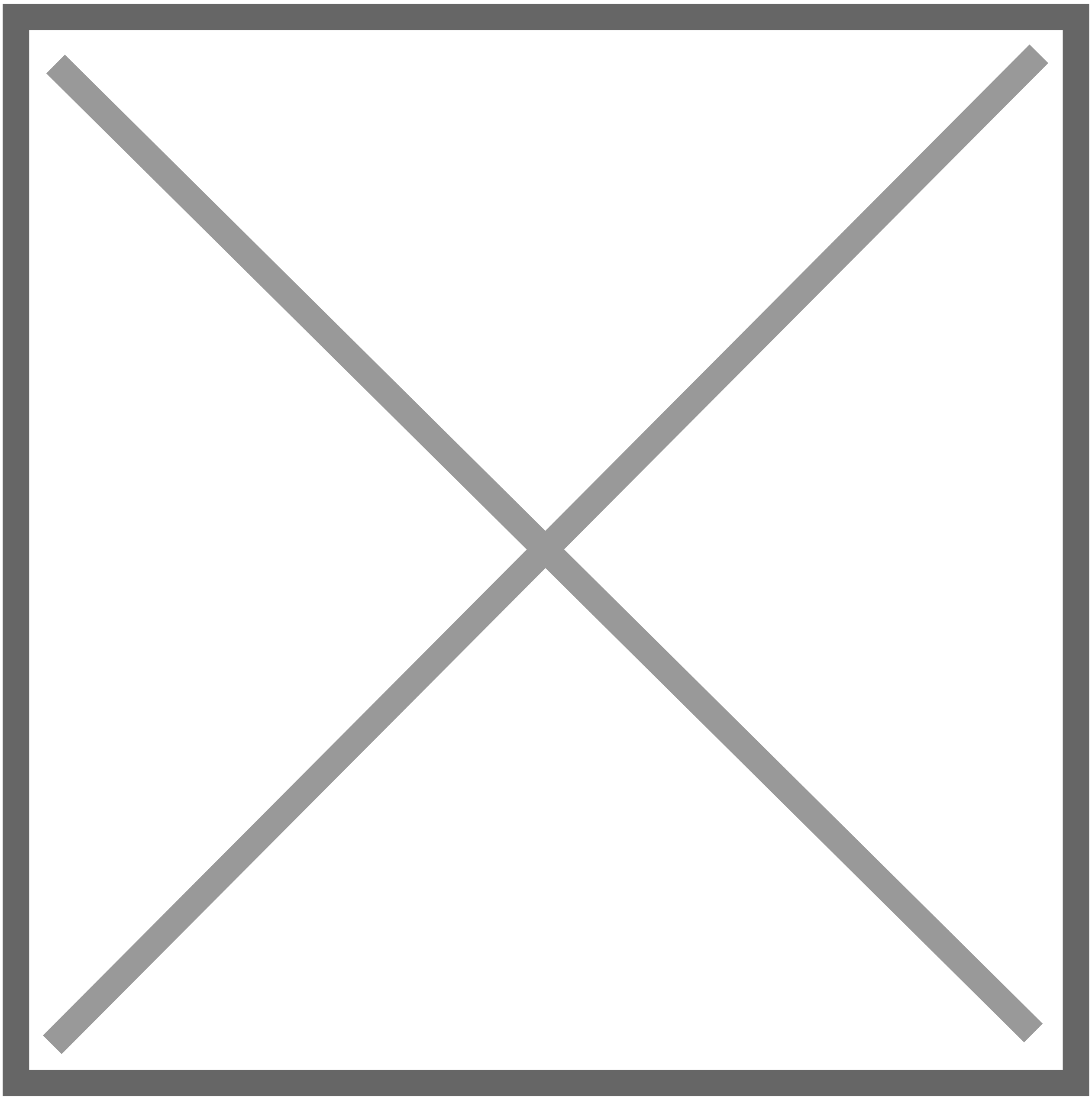


Emailing Attachments

We do allow for emailing of attachments, but as a rule the default setting is OFF to allow email of the attachment.

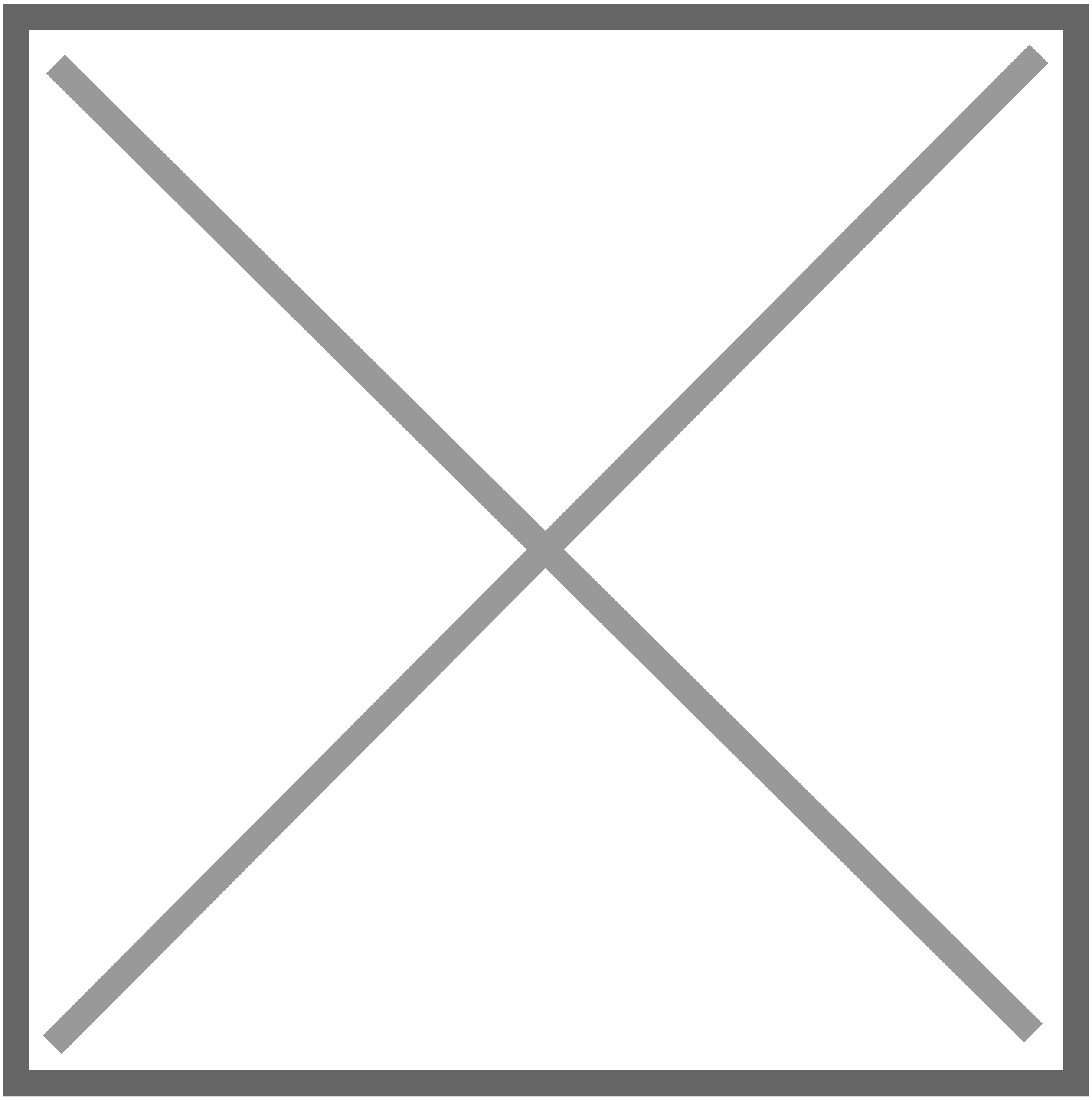
Drag and drop default is set to off to allow for emailing.

However you can edit the attachment to allow for emailing of attachment



When emailing, you need to tick which ones you want to email that has been flagged as allow email.

These are all security measures to ensure that an attachment sent to an outside company which is confidential or shows costs is not mistakenly sent off.



Email Attachment Alert

An alert will pop up on the emailing of documents where the flag to email an attachment is on

If a user has uploaded an attachment and wants to email it.

When we get to email and the user forgets to select the attachment he wants to send with the email.

An alert to comes up to say

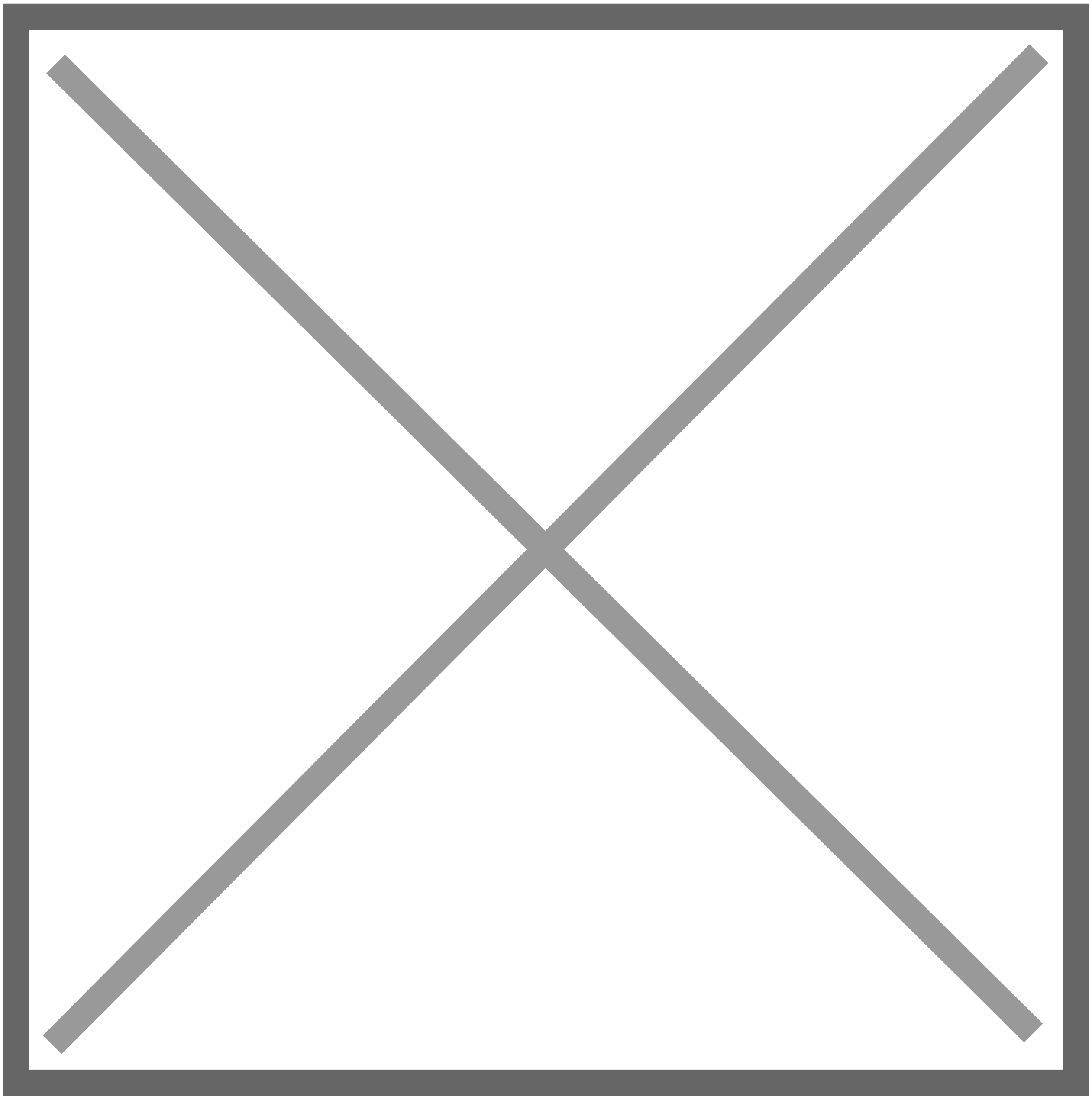
You have uploaded attachments to be sent with this email, but you have not selected the ones you want to send with this email

Continue without sending any attachments

Cancel to go and select attachments

If the user has selected the attachments, then the pop up will not come up

This is to help the user remember that he attached documents to send with the email, but most times people forget to select them to email.



Preview Images

Open the panel and click on any photo to preview image

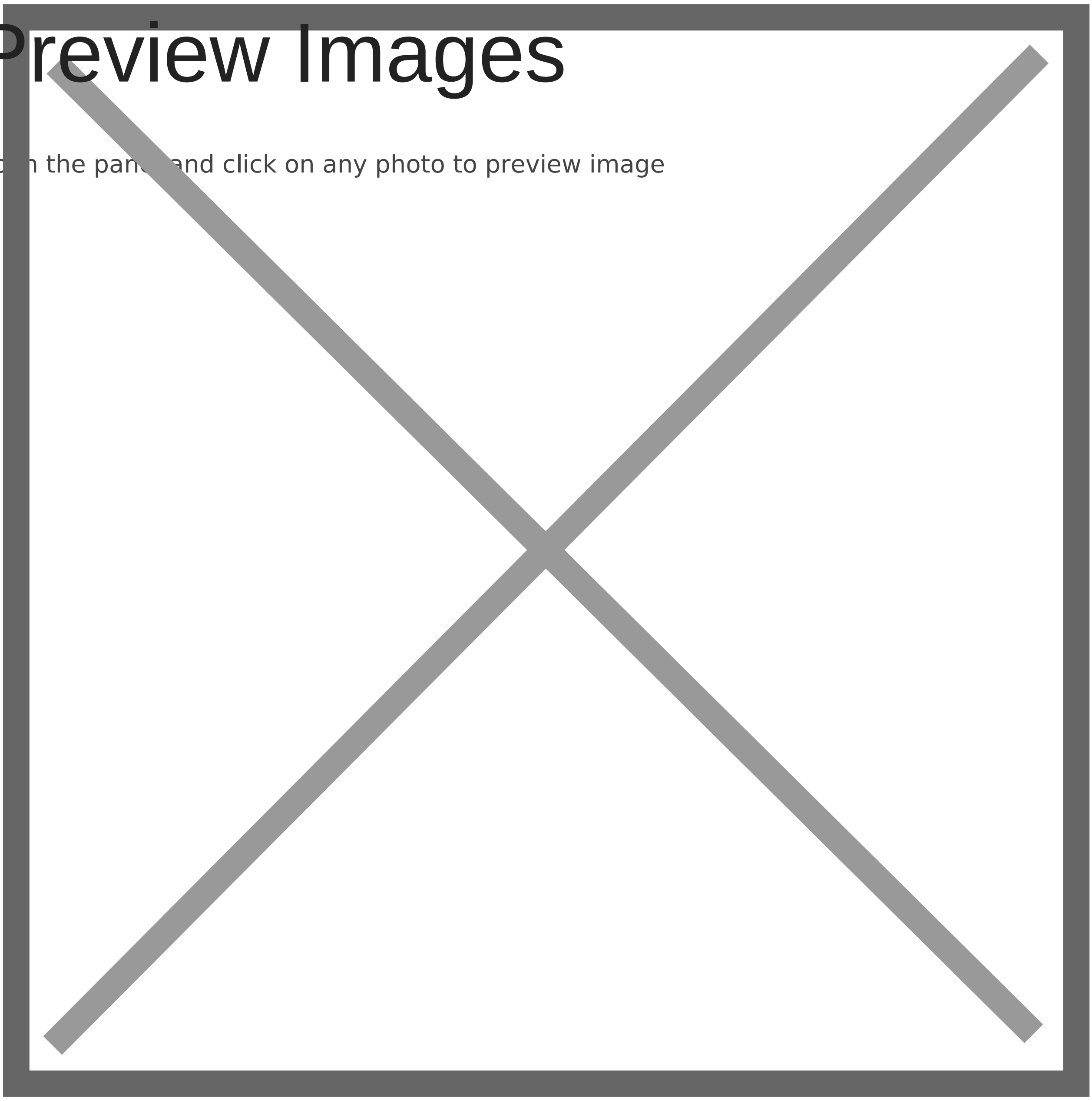
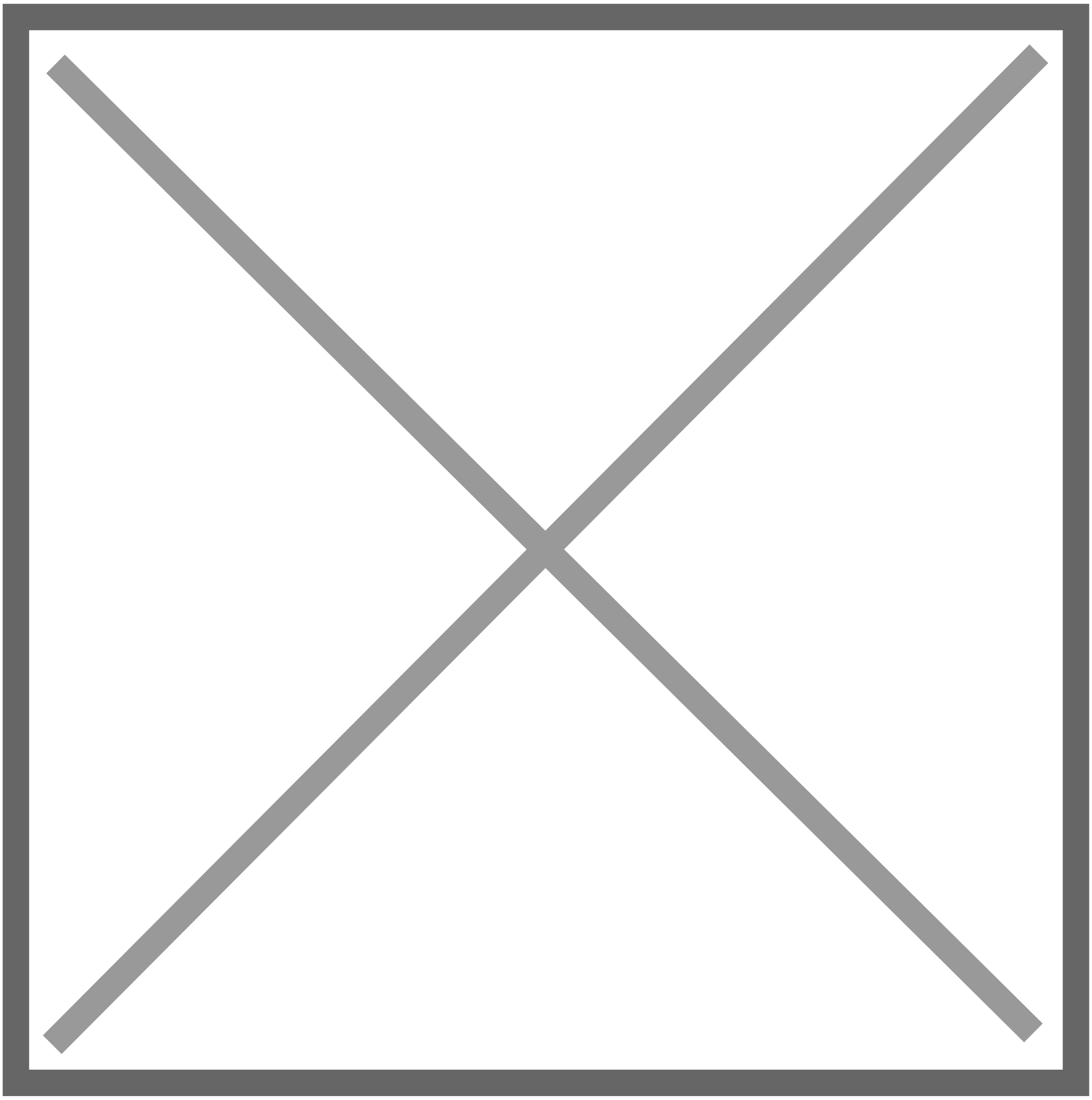


Image view, now shows condensed view to fit screen



Cannot View an Attachment

If you cannot open an attachment, it can be due to several reasons.

If your original file which contained your naming convention included multiple full stops, the system cannot determine what type of file extension it is.

Try renaming your original file and only keep the full stop for the extension of the filename.

The system maintains and accepts a white list of files that are all allowed to be uploaded.

If you find that you cannot open a file, it could mean that it is not on the white list of accepted imported files.

Please contact us to validate the type of file you are uploading so that we can add this to the white list.

The system maintains a white list for security purposes, it is there to ensure that no malicious files are being uploaded.

Here are some examples of files accepted:

["apng", "avif", "gif", "jpg", "jpeg", "jfif", "pjpeg", "pjp", "png", "svg", "webp"]

["doc","docm","docx","dot","dotm","dotx","odt","rtf","wps"]

["csv","dbf","dif","ods","prn","xla","xls","xlsb","xlsm","xlsx","xlt","xltm","xltx","xlw"]

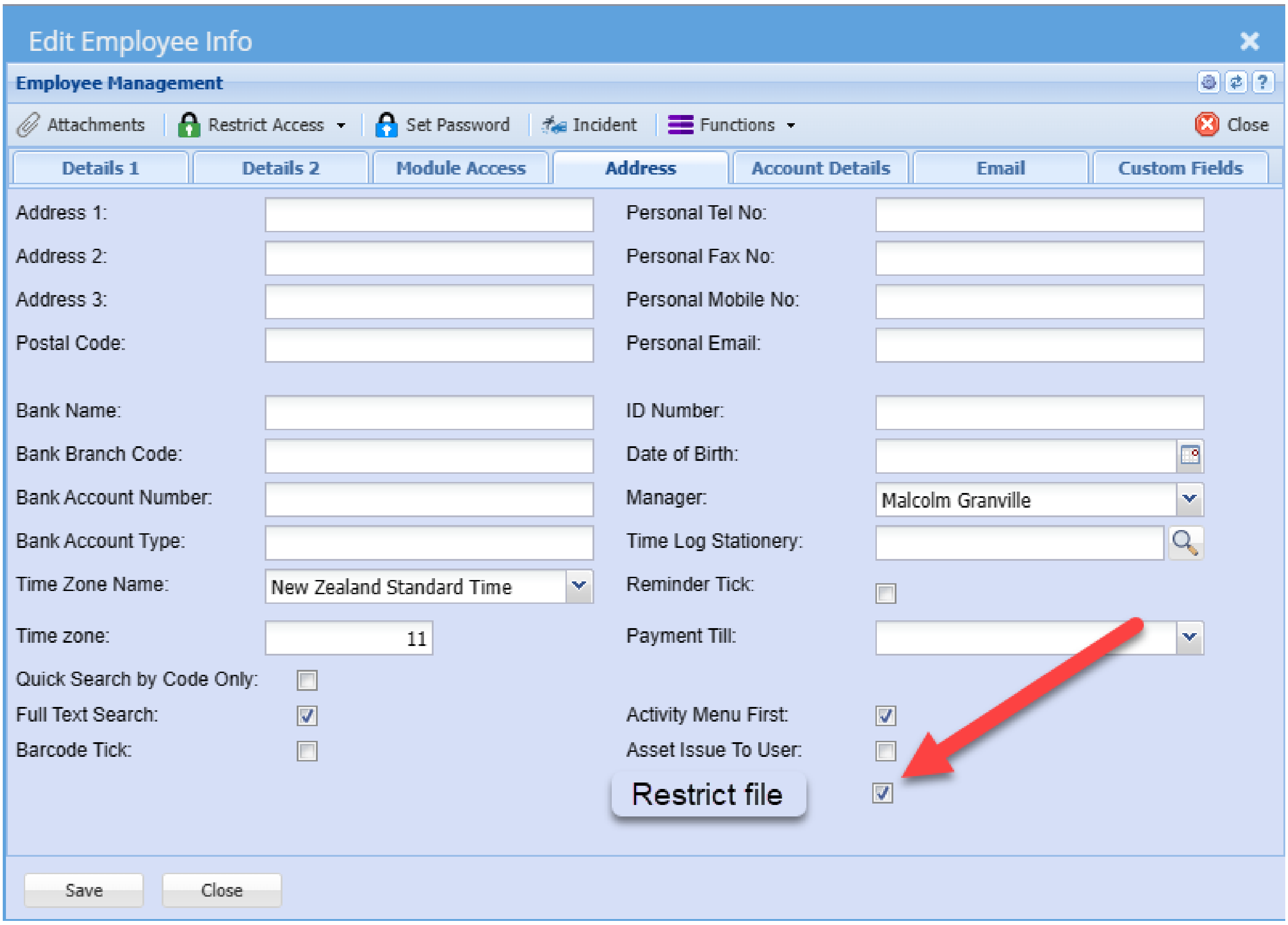
["msg", "txt"]

Restrict File

Restrict file view for users

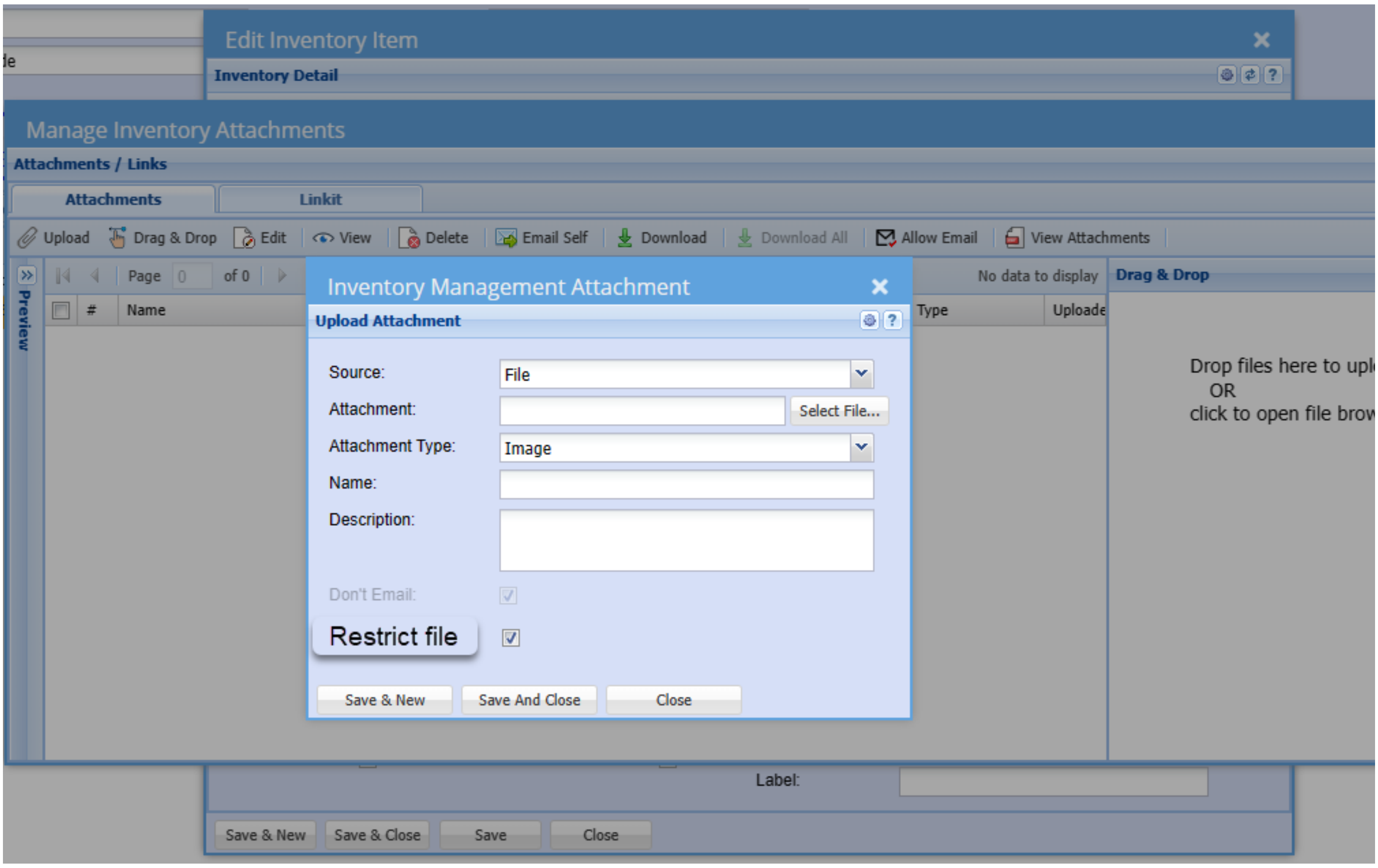
When a user is set to active on Restrict user, they will not see that file in the grid.

Tick is active for any new users created.



Attachment restrict file

When you upload the file, mark the file as Restrict file to hide from users who don't have access to view the file.


Edit Inventory Item
Inventory Detail
Manage Inventory Attachments
Attachments / Links
Attachments
Linkit
Upload
Drag & Drop
Edit
View
Delete
Email Self
Download
Download All
Allow Email
View Attachments
Preview
Page
of 0
No data to display
Drag & Drop
#
Name
Type
Inventory Management Attachment
Upload Attachment
Source:
File
Attachment:
Select File...
Attachment Type:
Image
Name:
Description:
Don't Email:
Restrict file
Save & New
Save And Close
Close
Label:
Save & New
Save & Close
Save
Close