

ATTACHING BACKUP DOCUMENTATION TO INVOICES

1. First you will have to scan and save backup documentation to your system in whatever folder you choose.
2. Next, find the invoice that has the expenses on it (either under INVOICES, MY DRAFTS or INVOICES, SEARCH INVOICES).
3. When the invoice profile opens, click on ADD then select ADD DOCUMENT from the drop down list.
4. Click the BROWSE button to locate the document you scanned and saved in step 1 above.
5. Now you must specify who may view the document under VIEW ACCESS TYPE. Owner means only you can see it; My Company means only people at your firm can see it; Network makes the document available to us so this is the choice you should always select.
6. EDIT ACCESS TYPE should probably always be just you or your firm as we would never want access to alter your document in any way.
7. SAVE
8. You can check to see if the document was attached successfully by going back to the invoice profile and select VIEW RELATED ITEMS, then DOCUMENT from the drop down list. The document repository for this invoice appears and you should see the document that you just added.