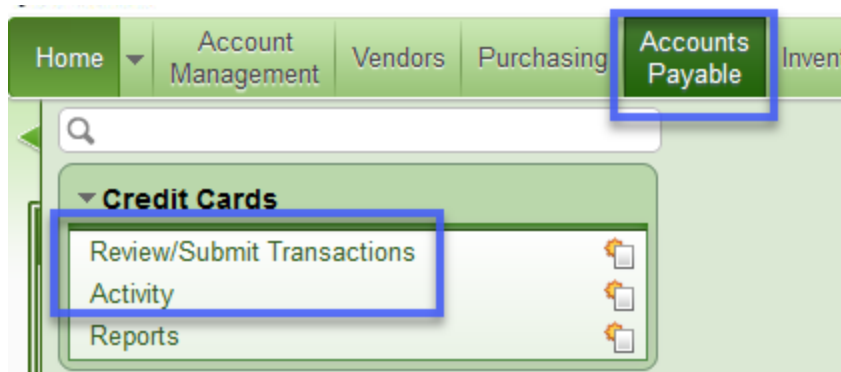


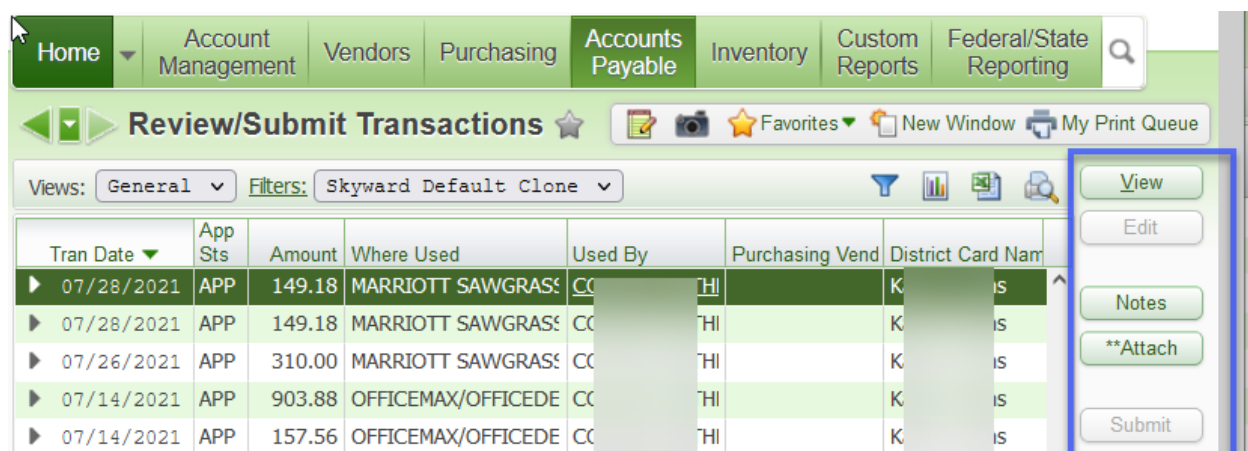
Adding Attachment and/or Notes to Credit Card Transactions

Users can attach files and/or notes. Some examples are quotes, invoices or packing slips. How to add Notes and/or Attachments to P-card transactions. When the user is in Review and Submit or Activity they will see a list of their credit card transactions. You can Edit the transactions before they are submitted for approval and you can add notes, attachments at any time.

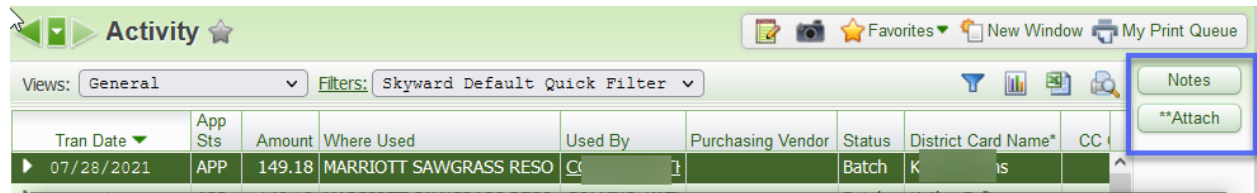
Go to Accounts Payable, Credit Cards, Review/Submit Transactions or if you have already submitted your transactions for approval you can go to Activity.



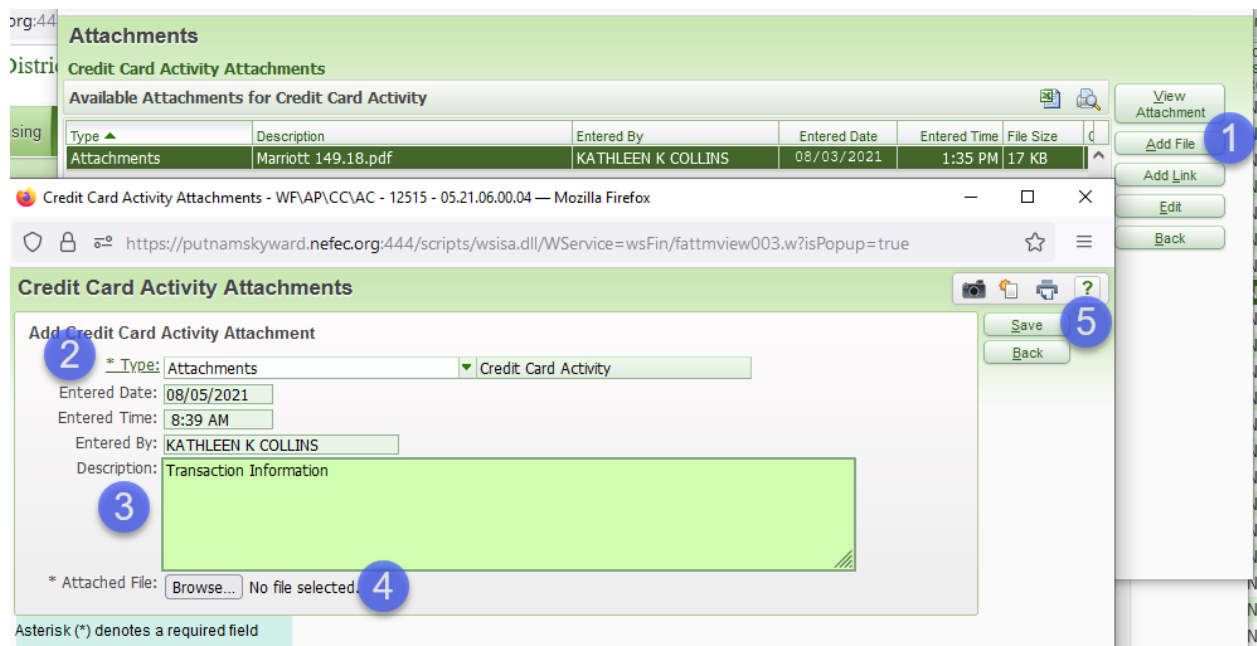
If you select Review/Submit Transactions, you will see these buttons on the right side of your screen.



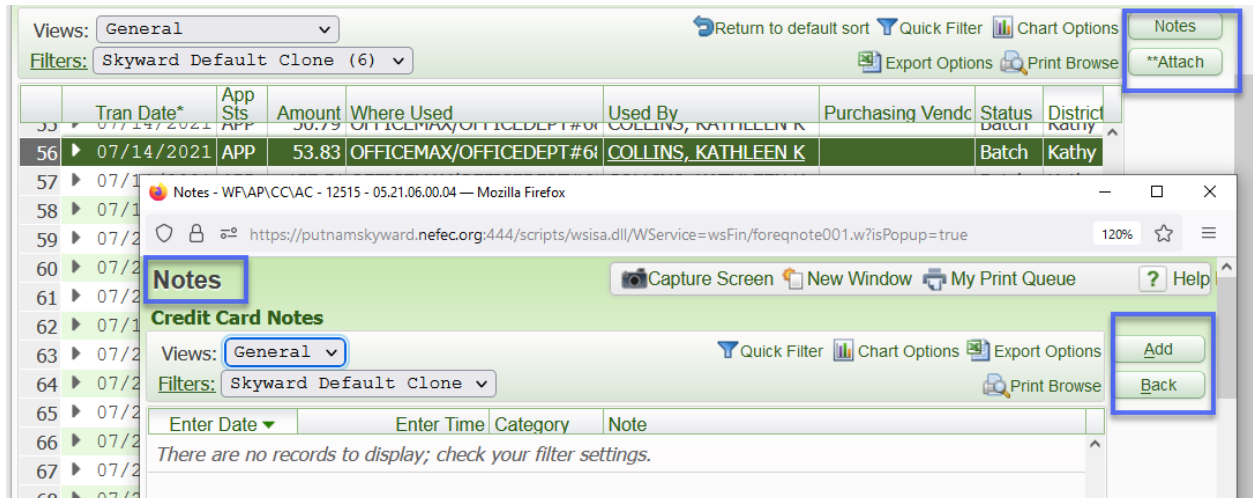
If you select Activity, you see these buttons on the right.



Highlight the transaction you want to add attachment(s) to then Click Attach. Click Attach and a box will pop open. In that box Click Add File. A box will pop up. Select Type, put in a description of transaction, click Browse to add your file from where you have it. Once you see your named filed beside the Browse box then click Save.



To add a Note, Click Note and a box will pop open.



Fill in with the information then click Save.

The screenshot shows the 'Notes' form in a web application. The form title is 'Add/Edit Note for Credit Card Tran: 23,976'. It has a 'Capture Screen' button, a 'New Window' button, a 'My Print Queue' button, and a 'Help' button. The form fields are:

- * Note Category: (dropdown menu) - Callout 1
- Entered Date: 08/05/2021
- Entered Time: 9:34 AM
- Entered By: (text field)
- * Note: Description (text area) - Callout 2
- Protected (Read only to all users except the user that entered it.): ☒ - Callout 3

 A callout bubble points to the 'Protected' checkbox with the text 'Check this box if you want your Note'. The 'Save' and 'Back' buttons are at the top right. A footer note says 'Asterisk (*) denotes a required field'.

To designate that a Attachment and/or a Note has been added two asterisks will on the button(s).

