FAQs
Version 2012 or higher

Attaching Receipts and Invoices to Accounting Transactions

Version 2012 of the Accounting software includes the option to attach invoices, receipts and other documents and data files to accounting transactions. The transactions can be added during the creation of the entry or after the entry has already been recorded and an invoice has been received. These attachments can also apply for Income and Sales transactions not just Payments and Purchases. Farm Works does not restrict what types of files can be attached to transactions. Commonly used files types include *.jpg, *.tif, *.bmp, *.pdf, word and excel.

**Adding Attachments to Transactions during entry**

1. Click the Record Payment/Purchase icon on the Checking toolbar.

2. Complete the Vendor area.

3. In the Items Purchased and How You Paid area, enter the details of the transaction.

4. Select the **Attach Files** button.

    [📎 Attach Files]

5. In the **Transaction Attachments** dialog, select the **Add** button.

6. Locate the file to be attached, left click on the file and select **Open**.
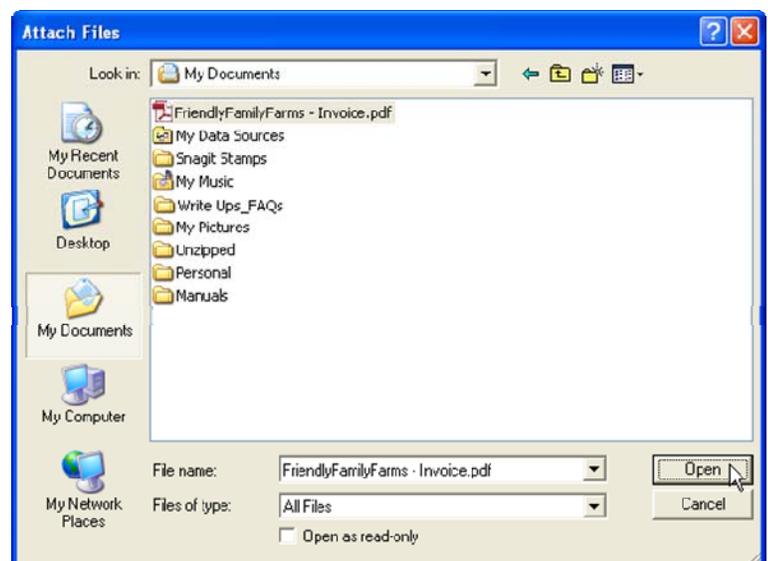
7. In the Transaction Attachments screen the newly added file will be listed.
    A. Select **Add** to add another file.
    B. Select **Delete** to delete a highlighted attached file.
    C. Select **Create** to create a *.txt file invoice
    D. Select **View** to view a highlighted attached file. When the View button in the Attachments dialog is selected, the program tells Windows to open the file with whatever program is set as the default viewer for that file type, if the file format is not recognized by Windows, it will not be opened. As such, it is recommended that you stick with standard file formats including .jpg, .tif, .bmp, .doc, .pdf, .xls and others.

8. After attaching the necessary files select **OK** to return to the Payments and Purchases screen.

9. Select **Record**.
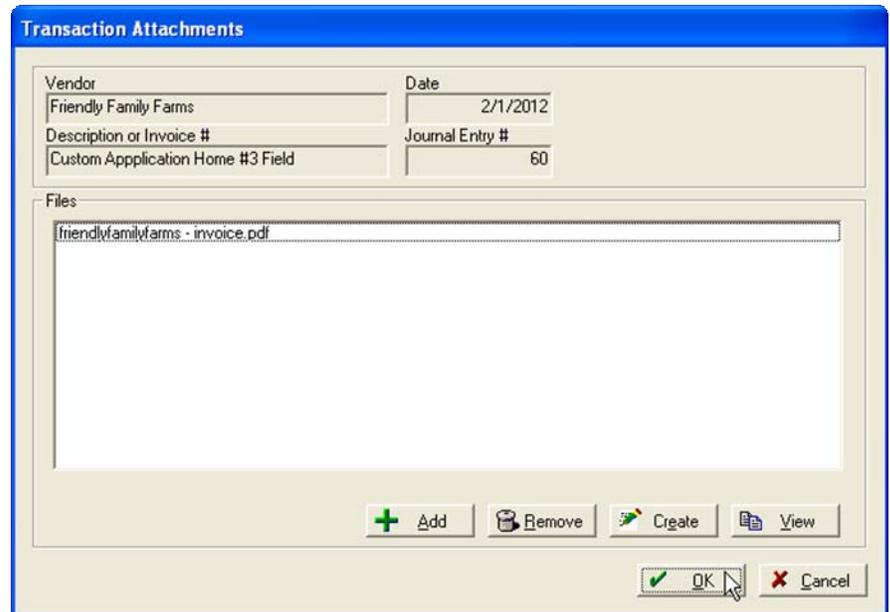
10. Items with an attachment will show in the Account Register with piece of paper and a paper clip Icon. You can click on this button to display the contents of the attached file.

11. Items that do not have an attachment will show in the Account Register with a paper clip only.

12. To add an attachment to a transaction previously recorded, select the paper clip icon next to the transaction within the Account Register.

13. Complete Steps 6 -9 finish attaching an invoice to a previously recorded transaction.