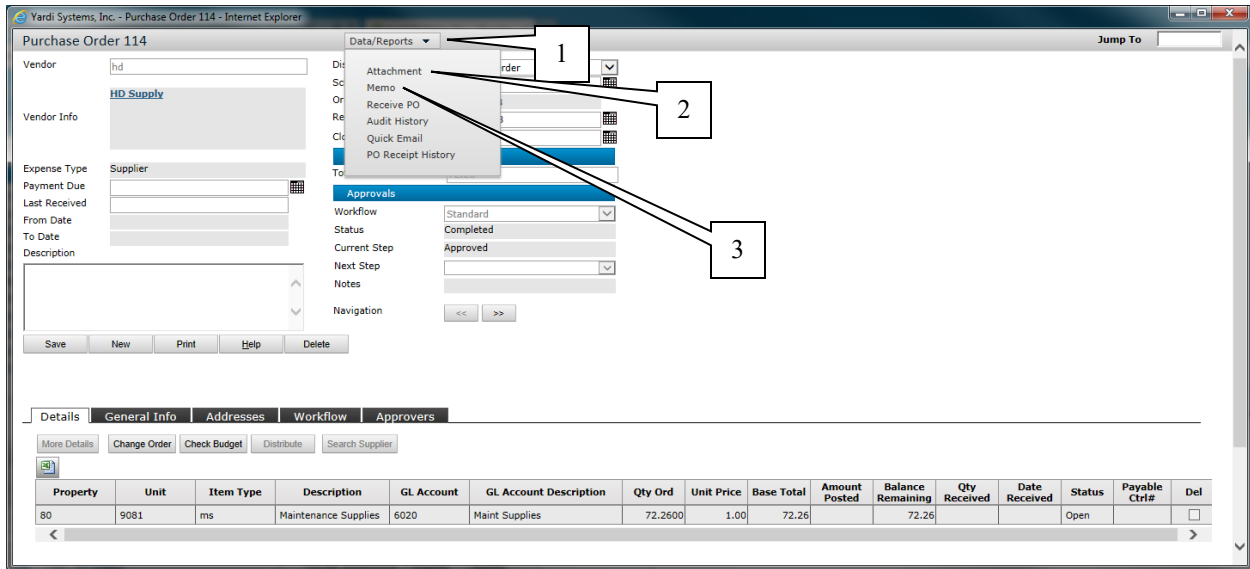


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(1) Data/Reports The drop down displays additional functions

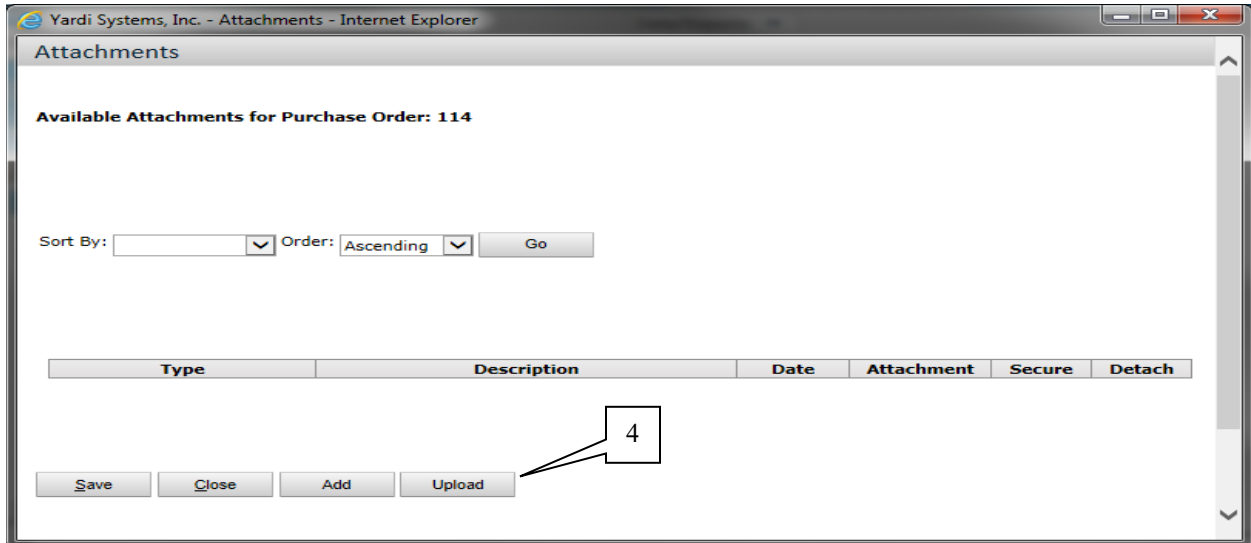
(2) Attachment; Allows you to attach documents to the Purchase Order

(3) Memo; Allows you add detailed Memos about the Purchase Order

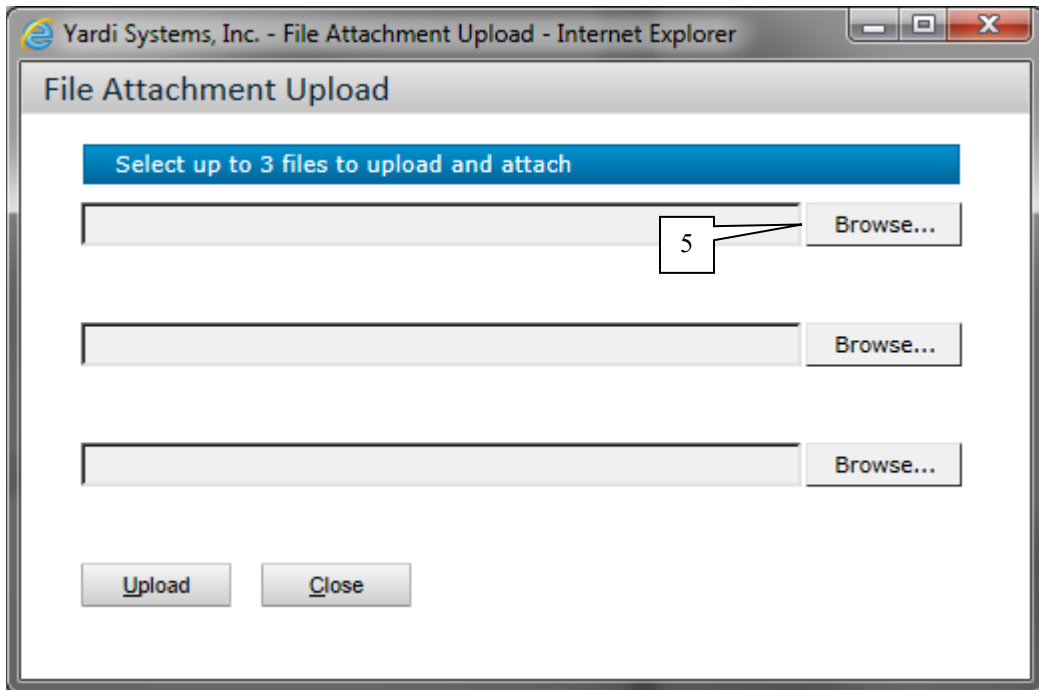
To Attach documents, click on the Attachment link

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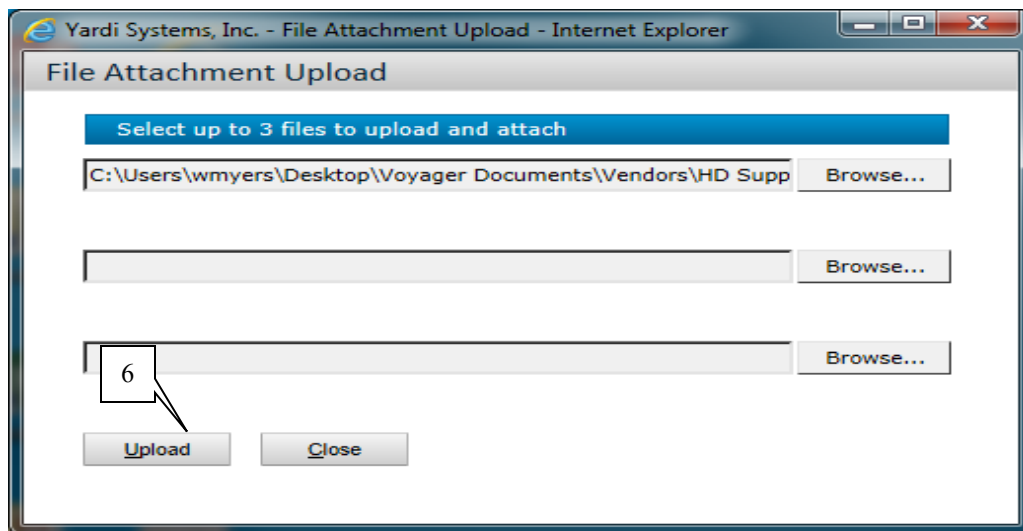


Click on **(4) Upload** to open the Upload Link



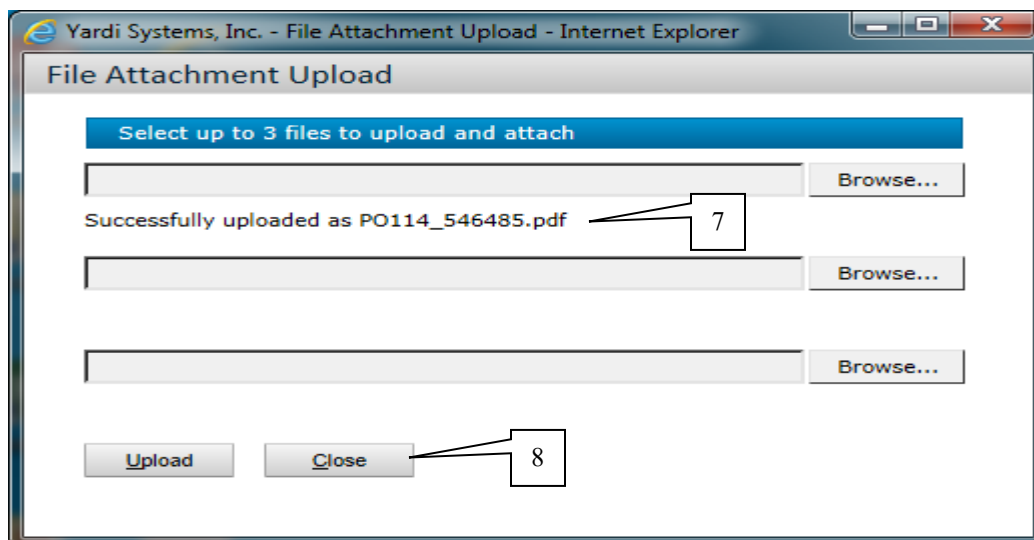
Click on **(5) Browse...** to browse out to the location of your document you are needing to attach. Your pdf files are located on your desktop as outline in Procedure V-405.

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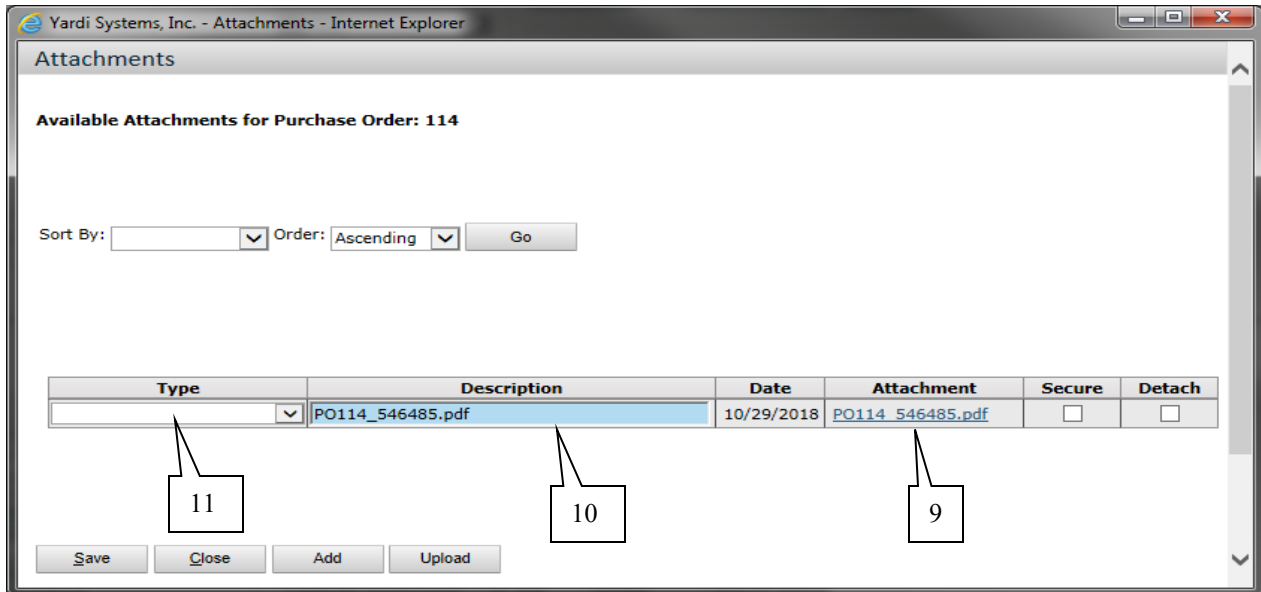
The path to your document is now listed. You can add up to 2 more documents on a single upload by clicking on the next **Browse...** to select the next file.

Click on **(6) Upload** to upload the pdf file.



After the **Upload** is completed you will receive a message of “Successfully uploaded as” followed by the name of your pdf file **(7)**
Click on **(8) Close** to close the window.

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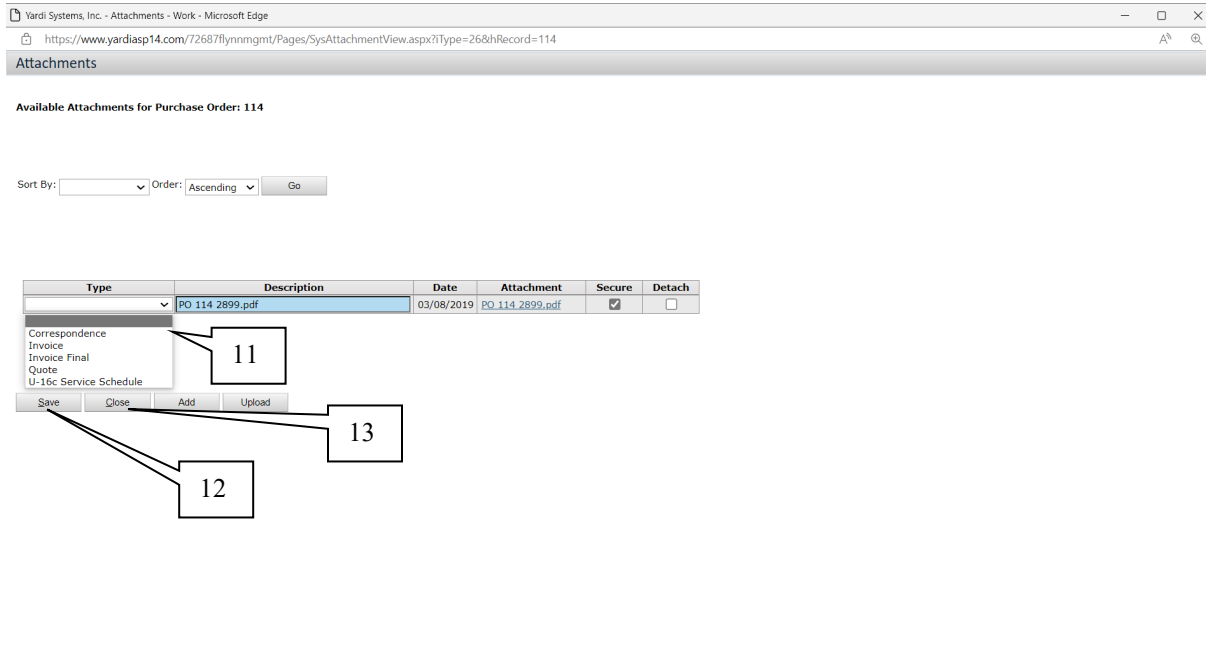


The pdf is now attached. You can click on the hyperlink **(9)** to open the Attachment to confirm you uploaded the correct file.

The Description field **(10)** duplicates the name of the Attachment. The description can be changed if you want to identify the attachment further. If you change the name of the Description, it will not change the name of your Attachment.

(11) Type: You **MUST** select the Type that identifies the attachment.

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(11) Type;

Correspondence – Used to identify the attachment as additional information relating to the purchase order.

Invoice – Used to identify the attachment is an invoice but, you are expecting more invoices. This invoice is **not the last invoice** you expect to receive for the Purchase Order.

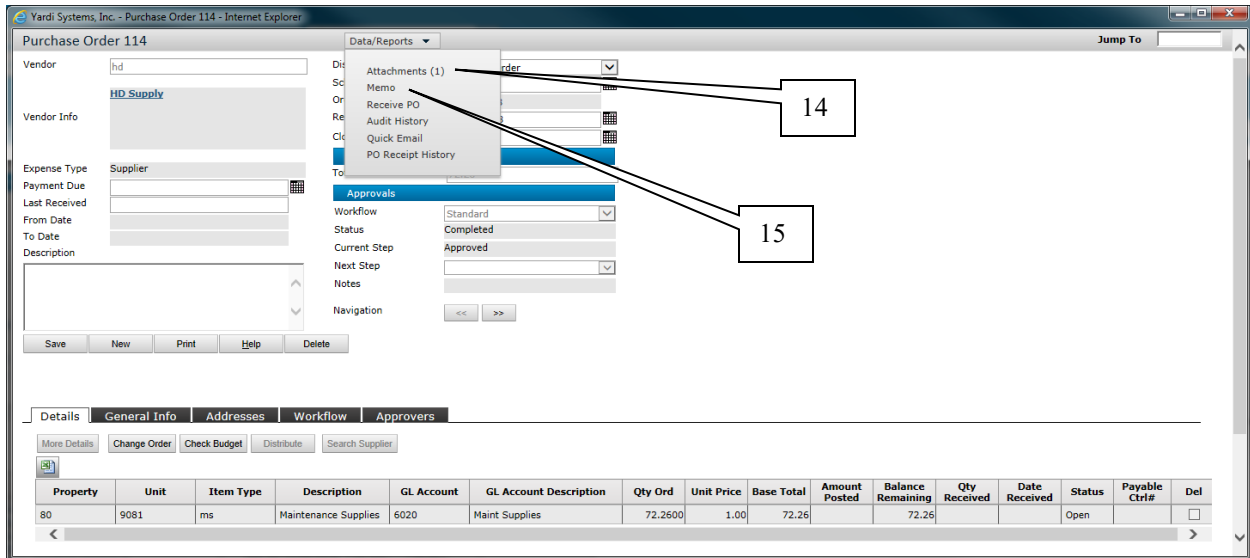
Invoice Final – Used to identify the attachment is the **FINAL** invoice for this Purchase Order.

Quote – Used to identify the attachment is a Quote

U-16c – Used to identify the attachment is the completed U-16c that **MUST** be attached with your monthly lawn service submissions.

Once the Type is selected, click on **(12)** Save to save your changes then on **(13)** Close to close the window.

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(14) Data/Reports When viewing your Purchase Order, you will now see the number of Attachments listed in parenthesis that have been attached to the purchase order

MEMOS

(15) Memo: Allows you to add detailed Memos about the Purchase Order. Memos are used to communicate with accounting regarding the purchase order status.

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Yardi Systems, Inc. - Memo Information - Internet Explorer

Memo Information

Memos for Purchase Order: 114

Date	Type	Status	Notes
------	------	--------	-------

Date: 10/29/2018
Time: 12:48 PM
Type: [dropdown]
Status: Memo
Result: [dropdown]
Agents: [dropdown]
Notes: Second shipment will be coming on PO 115

Show on Calendar:

Property: [text field]
Unit: [text field]
Unit Type: [text field]
Employee: kkelber

Save Close Help

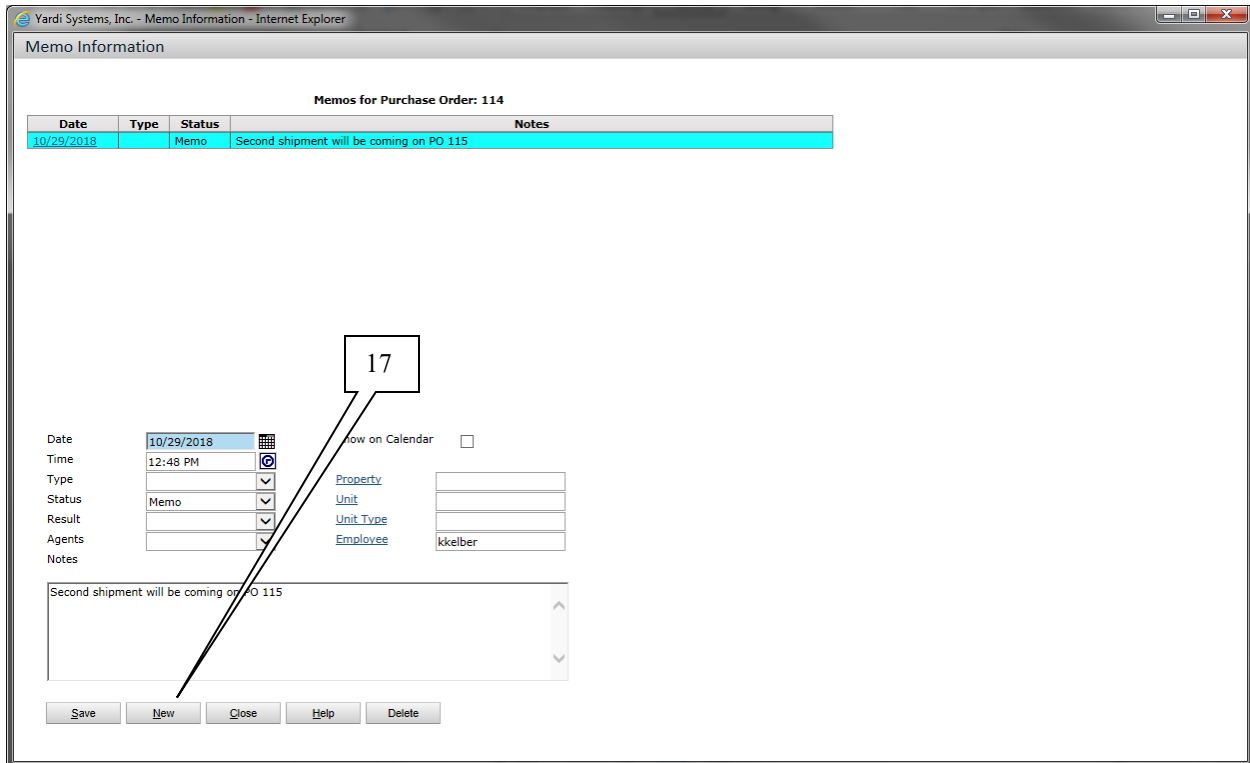
16

All of the fields default with you as the Employee.

Enter the Memo that you want to include for this Purchase Order

Click on **(16)** on **Save** to save your changes.

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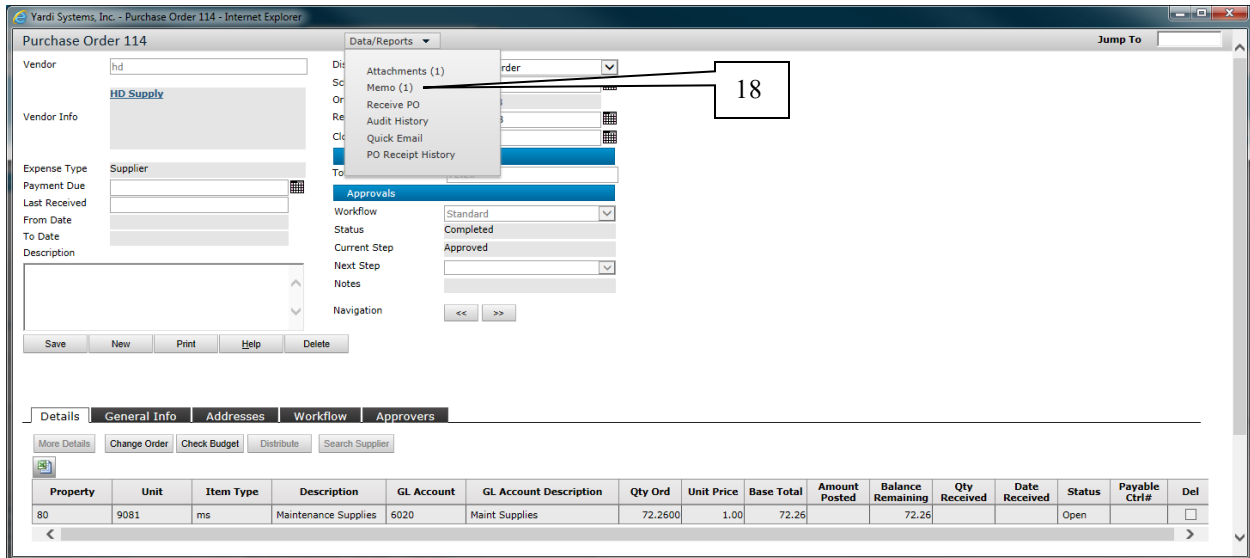


Once Saved, the updated note will also appear at the top of the screen.

Click on **(17) New** to add additional memos to the Purchase Order.

Whenever your Final Invoice is less that the value of the PO, always add a memo of “Invoice less than PO” to notify accounting to manually close the PO once vouchered.

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(18) Data/Reports When viewing your Purchase Order, you will now see the number of Memos listed in parenthesis that have been attached to the purchase order.