RLSS Document Attachment

Working remotely from the office presents many challenges. You may need to access loan contracts and related documents, the most current financial reports provided by your loan client, copies of checks/money orders used for repayments, etc. The Attach/Retrieve Files feature within the RLSS software is a perfect tool for accessing documents stored on your file server, eliminating the need to run to the file cabinet and allowing you to remotely access them.

To use Attach/Retrieve Files, you simply save or scan your document(s) to a secure location on your file server. (You should work with your IT person to set up this secure location.) Once saved, you will go to Loan Master and select the loan in which the document is to be attached. Next, click on the Attach/Retrieve Files icon at the top of the screen (second icon from the right and looks like a magnifying glass and file folders). From this screen, you will browse to the location of your saved document and click on it. Click on the Save button. This will move the path to the document to the larger box below. You may repeat this process for any additional documents.

To later Retrieve the document(s), you may either click on the same icon at the top of the screen or click on the paperclip icon that is now visible in the lower right corner of the screen. If only one document is attached to the loan, it will immediately open. If you have more than one item attached, you will receive a listing of all documents to select from.

You may also use the Attach/Retrieve process on the Loan Activity screen to attach copies of checks, money orders, etc. to the Loan Activity being entered.

Should you later move the location of the attached document, you will need to re-attach it to the loan.

To un-attach a document from a loan, click on the Attach/Retrieve Files icon. In the big box in the lower portion of the screen, left click on the document so that the saved path becomes highlighted. Click on your Delete button on your keyboard. You will be asked to confirm that you wish to delete the item. This is only deleting the saved path from this loan. Your document will remain in the secure location on the file server.

Search Options Within the GMS Accounting Software

In past issues of GMS News, we have included articles regarding how to search for information within the GMS Accounting Software. (These can be viewed by selecting Help/Operating Information/Search Options.) Following are additional techniques that you may use to search for records within your software. This first screen shot contains all employee files in the database used for the examples below it so that you may compare how the filters work.
To invoke the search panel
To invoke the Search Panel, press the CTRL+F shortcut. When you type within the search box, the grid automatically searches for that text in all columns and filter the view.

To search specific columns and not all columns
Search function is default by wildcard. It will try to find all the matching letters in all columns in the grid. We can set the property to default to only the column we want. For example, we can default to 2 columns like FName, LName.

To search against a specific column, type the first letters of the column's display name plus a colon character. For example, if you wish to search the First Name column for John, you would type F:John. If the second column starts with the same letter as the first column, type in the 2nd letter for the column name, such as FN:John.

To search for more than one word options
To search for a string that contains a space character, you need to enclose this string in quotation marks.

If you add another column-specific condition, the grid joins them using the **AND** logical operator and displays records that match both of them. The same happens when you join a column-specific condition with the one applied to all columns: the result will contain records that satisfy both criteria. The following example is looking for the "Status of A" plus the words "Charles Road".
To find records that contain both, type "+" before the second word. Similarly, you can type "-" to exclude records that contain a specific word. This example is searching for every time the words "Donald" and "MD" appear.

Work From Home Tips to Share

A good portion of you are now working from home. Do you have any tips that you would like to share with others as to how you have changed your procedures? Do you attach documents to your vouchers as back up? Are you creating PDFs of reports to share? Are documents scanned and emailed to you for processing? Are you importing spreadsheets? Please let us know what you have found works for you to best manage your accounting and/or loan software. We will share in our July newsletter any tips received that we feel will benefit others.

Please email your tips to Marilee at marilee@gmsactg.com.

Diana Provencher from Central Massachusetts Regional Planning Council in Worcester, MA will be retiring on June 30. Have fun in this new chapter of your life, Diana!

REGIONAL TRAININGS
YEAR END PROCEDURES/PREPARING FOR AUDIT - OCTOBER 8, 2020 - LOUISVILLE, KY

WEBINARS
FIXED ASSETS - JULY 15, 2020
COST ALLOCATION - NOVEMBER 18, 2020