

Document Management System (DMS)

~ DMS ~

The ~ **DMS** ~ tab is used to upload and attach documents and files to the record you are on — for example a PDF invoice, an XML file, an image, a spreadsheet and similar.

All uploaded attachments are stored in the [Document Management System \(DMS\)](#) and remain permanently linked to that record.

The tab is shown only to companies subscribed to the [Document Management System \(DMS\)](#) module.

Adding a new attachment

1. Open the ~ **DMS** ~ tab.
2. Start adding a new attachment with the  button.
3. Enter a short, recognisable description of the attachment in the **{Name}** field.
4. Open the file selection window of your computer with the  button.
5. Find and select the file on your computer.
6. Confirm the transfer with the  button so that the selected attachment is saved in Brix.



The size of a single file is limited to 8 MB. A larger file will not be transferred — reduce it or split it into several smaller files.

Linking an existing document

The same document often relates to several records in Brix — a purchase contract to a goods receipt and to a journal entry, a delivery note to a goods receipt and to an incoming invoice. Such a document does not need to be uploaded more than once: it is uploaded to the first record and linked to the others.

1. Open the ~ **DMS** ~ tab of the record the document should be linked to.
2. Click the  icon. It stands to the left of the  button used for adding a new document.
3. A list of documents already in the DMS is shown, with a filter above the list — by department, year, month, type, table, tags, reference number and view level.
4. Narrow the list with the filter and select the document from the list.

Odjel

▼ Godina

Mjesec

Vrsta

Ručno postavljeni dokumenti

× ▼ Tablica

▼ Oznake

Uredžbeni broj

Razina pristupa

Datum	Naziv	Oznake
30.10.2026		
04.09.2026		
04.09.2026		
04.09.2026		
03.09.2026		
03.09.2026		
03.09.2026		



The document is physically stored only once. Linking shows the same record on every record it is linked to, so a change or a new version of the document immediately applies everywhere.

Attachments on incoming invoices

For an incoming invoice that was entered automatically from an invoice issued by another company in Brix, the PDF of that invoice can be downloaded.

-  The icon is shown when there is an invoice available for download. Clicking it transfers the PDF of the invoice into the DMS of the company that received the incoming invoice.

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