I. **SUBJECT:** How to create an Attachment to a Sales Order in JD Edwards

II. **PURPOSE:** The below describes steps on how to insert an attachment (.pdf or .doc) within a sales order, both during order entry and after to an existing order. This attachment would be used for purposes of proof or as a supporting document, such as an email.

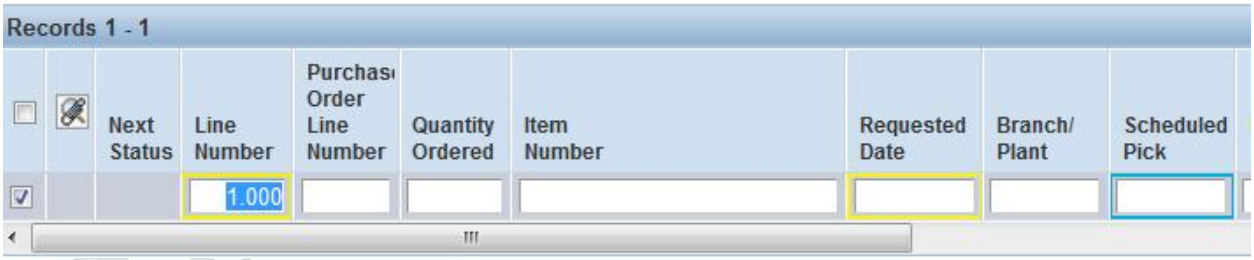
III. **PERSONNEL AFFECTED:** Customer Relations Coordinators (both OEM & Aftermarket)

IV. **RESPONSIBILITIES:** Because of the possible large size of the .pdf or .doc (word document), it is recommended that you be selective and use common sense when inserting an attachment. Documents of a substantial large .pdf or .doc will inevitably take up unnecessary system storage and can affect system performance.

V. **INSTRUCTION:**

1. Inserting a line attachments during Order Entry:

   While you are in the process of entering a new order, select the line you would like to add the attachment to,



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Revision Date	Description

2. Click on Row and then Detail Attachments

3. In the Media Object Viewer, click on 'File'

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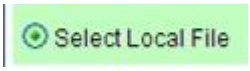
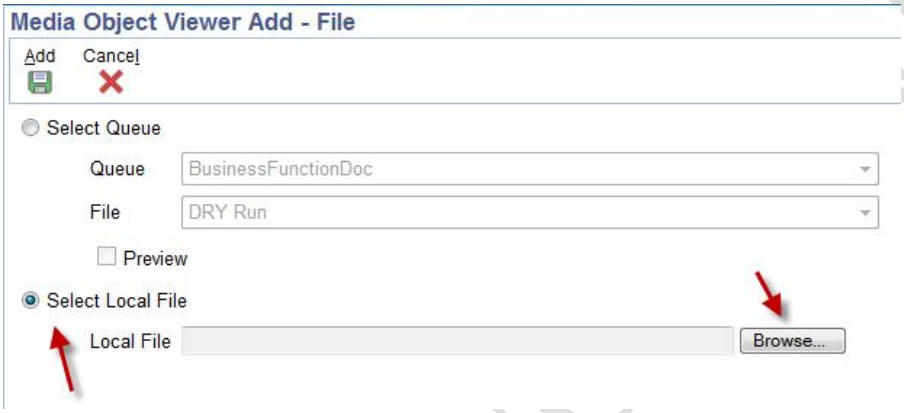
Revision Date	Description

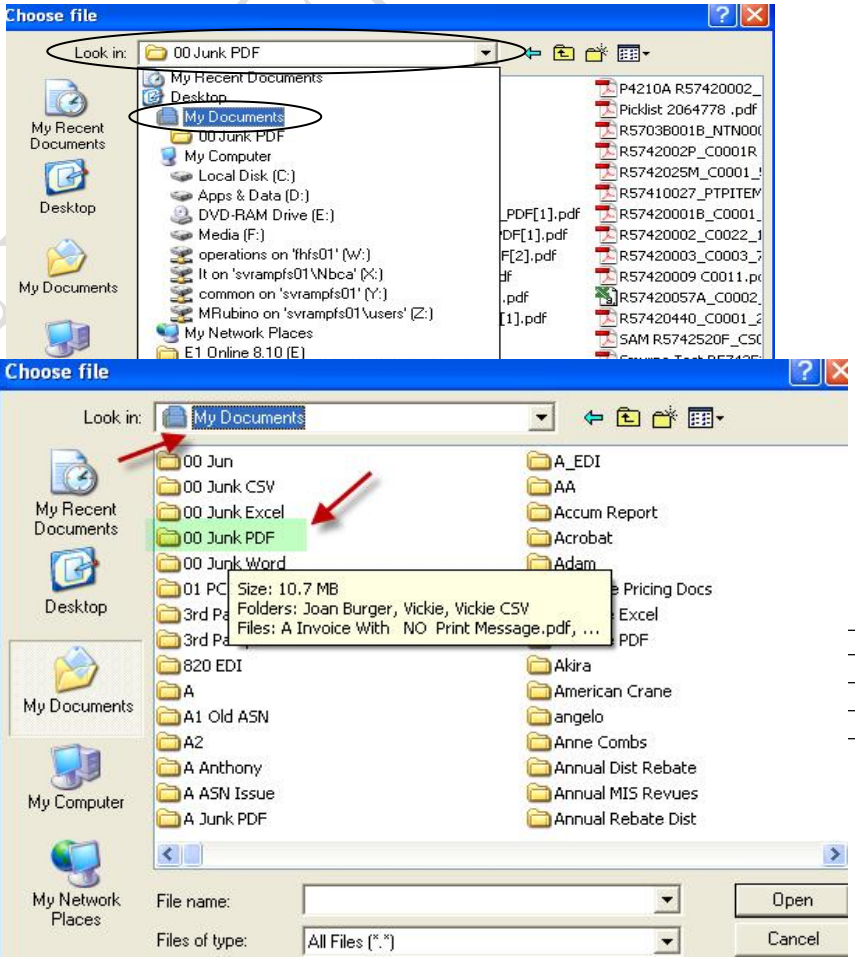
4. Once you are in the Media Object Viewer, click on:

   a. Select Local File 

   b. Browse



5. Select the Drive and Folder where your document is stored



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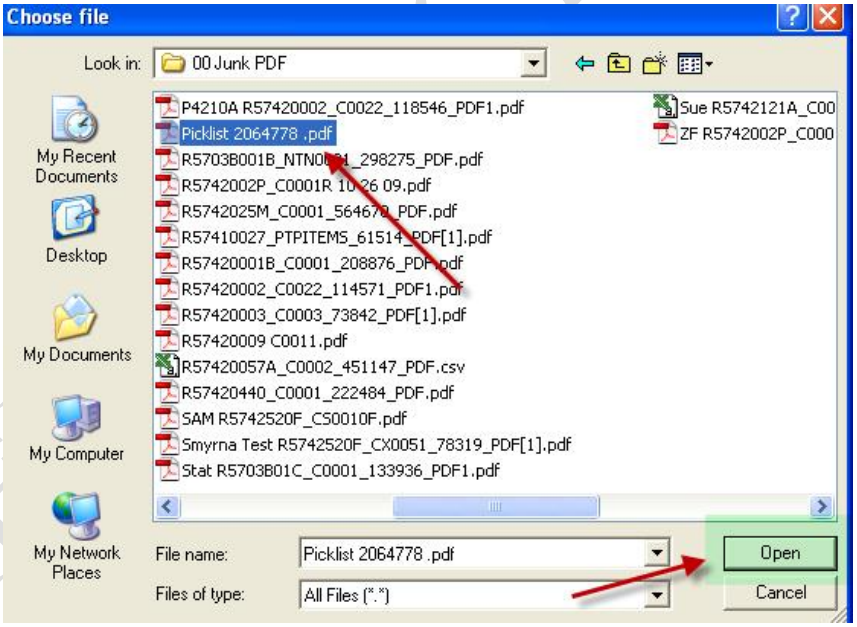
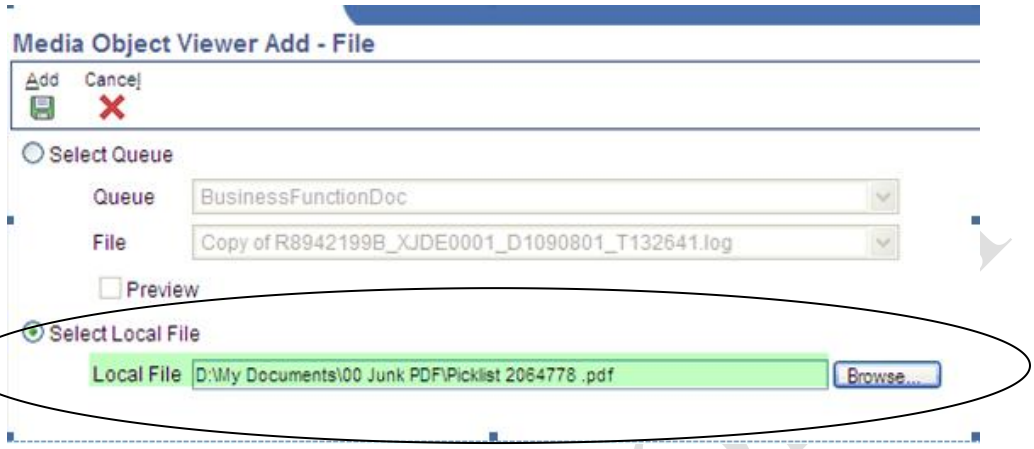
6. Select Document to attach and click ‘Open’

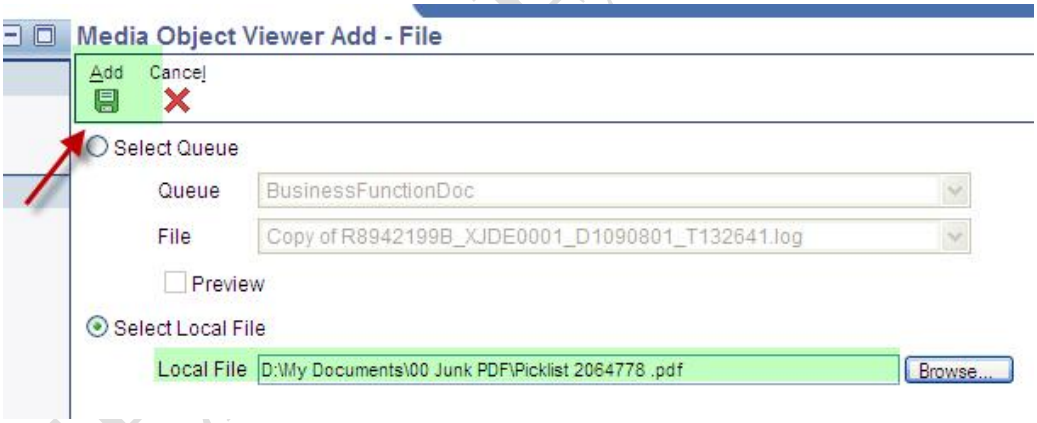


7. Selected Document will display in the ‘Select Local File’ box.

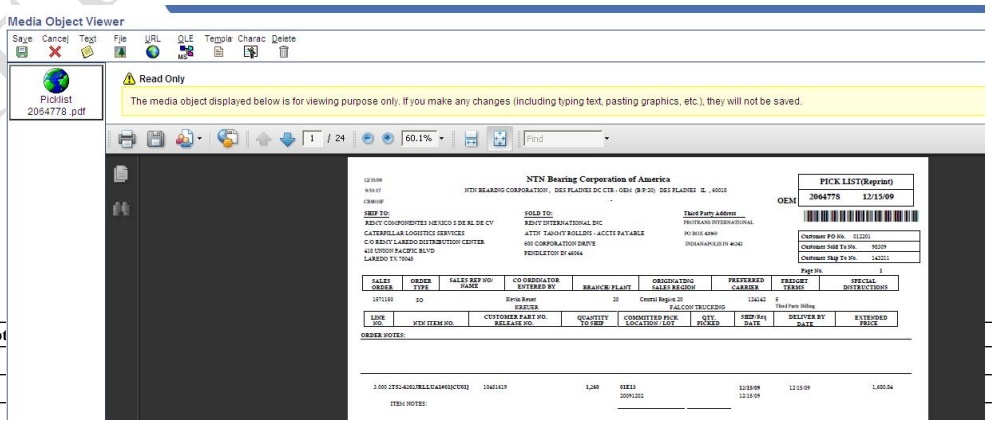
Revision Date	Description



8. Click on 'Add'

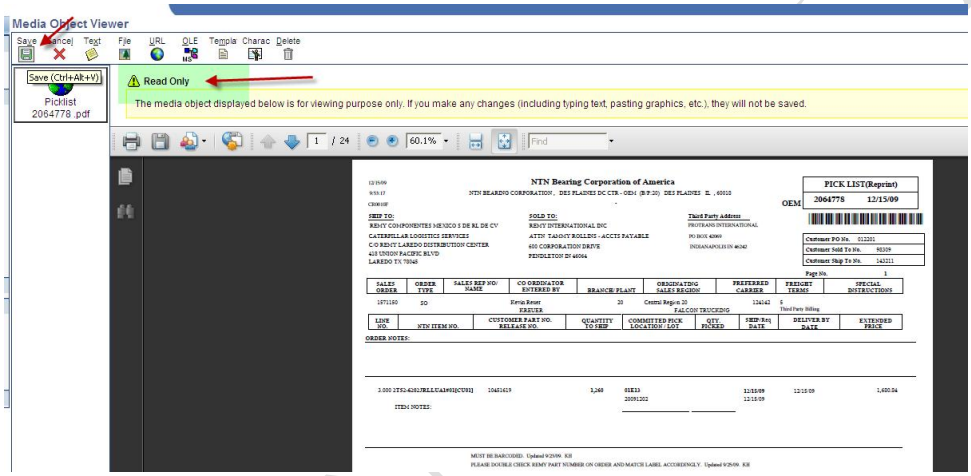


ur Selected Document will be displayed



Revision Date	Descript

9. Click on 'Save' to attach the document to the order line and return to point of order entry or inquiry.



a. The paper clip symbol will be shown to identify an attachment

Revision Date	Descript

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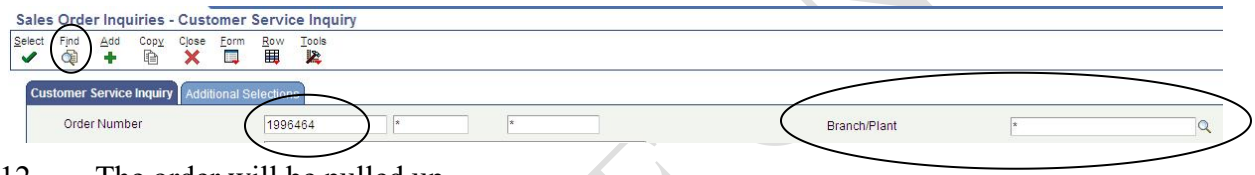
10. Proceed with Sales Order Entry or Inquiry.

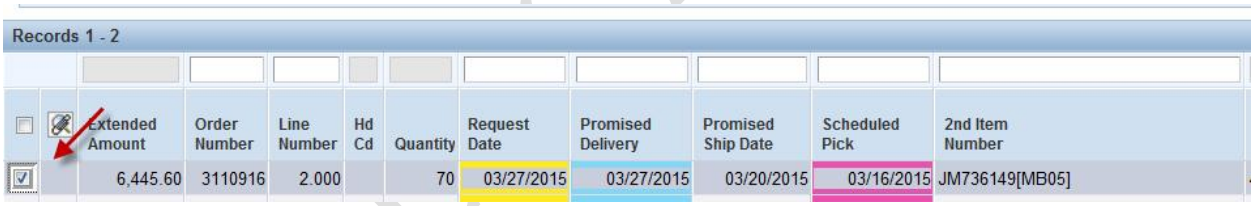
11. To insert an attachment to an existing Sales Order:

    a. Enter the Sales Order number, or PO number for the order you want to add the attachment to, enter an asterisk (*) in the Branch/Plant field and click on 'Find'.

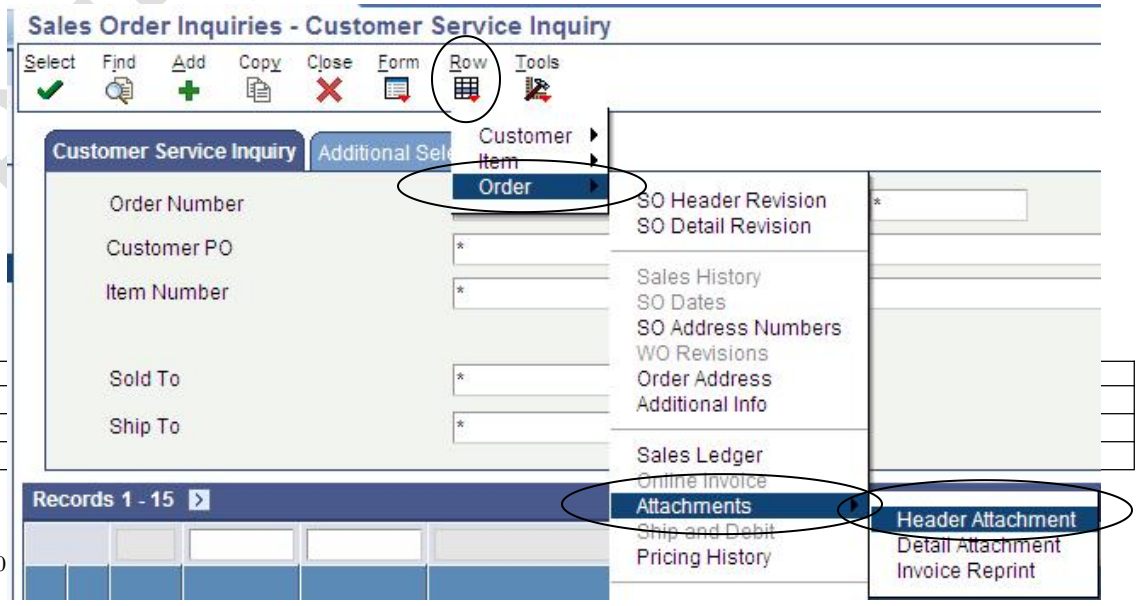


12. The order will be pulled up.

    a. Select any line listed from the order you wish to add the attachment to.



    b. Go to 'Row' and select 'Order', then 'Attachments', then 'Header Attachment'



PREFERENCE ONLY

c. Continue from Step 3 above.

VI. RECORDS: N/A

VII. RELATED DOCUMENTS: N/A

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Revision Date	Description