Attachments

Attach files to Microsoft Dynamics® SL screens using the newly enhanced Notes Icon which now allows both entering of notes and associating files with specific information.
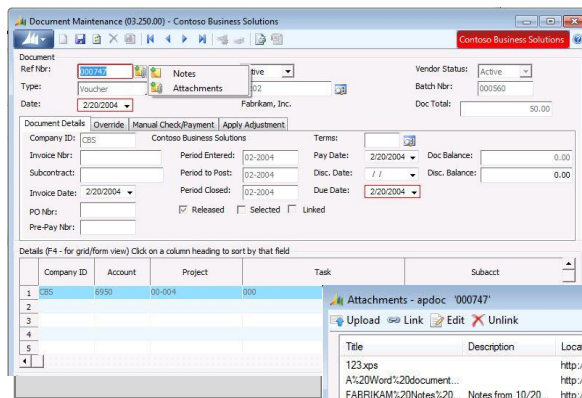
Attachments

Attach ERP documents to Microsoft Dynamics SL data:

- Attach documents to Microsoft Dynamics SL screens.

- Uses existing Microsoft Dynamics SL notes feature to attach documents.

- Fast and easy access to information by storing documents electronically and not in a filing cabinet or someone's office.

- Store or link numerous file types including scanned images, office documents, pictures, correspondence and more.

- Provide quick access to supporting documentation for transactions.

- Store documents on a network or Microsoft SharePoint site for seamless sharing across the department.

Attach documents to batches, documents, detail lines or IDs.

Attachments screen Upload, Link or drag and drop files to attach them. Click on an attached document to get a preview of the document without having to open it.
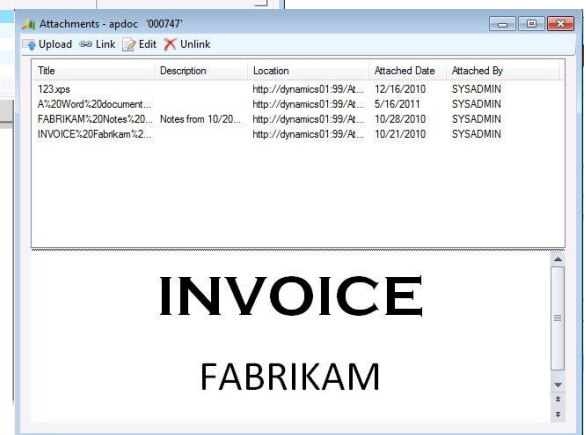
Microsoft Dynamics SL 2011 is easy to learn and use, drives value for your business and extends connections across your entire ecosystem, helping ensure that people—and the different ways they work—are your most powerful asset.

Microsoft Dynamics SL 2011: Built for your dynamic business

Attachments Feature

Where can I attach files?

- Attach documents to all Microsoft Dynamics SL screens that contain the note feature
- The Note features allows the recording of information about a batch, document, line item or ID
- The enhanced Notes feature now adds the ability to attach a document
- Preview attached documents inside the Attachments screen

How to attach files?

- Browse to a location and upload a document
- Link to existing documents
- Link a document to multiple records
- Enter a brief description about each uploaded document
- Drag and drop files to upload them

Where are the files stored?

- Save documents to
  - A Microsoft ® SharePoint® location (URL)
  - A Microsoft Dynamics SL Doc Share (SharePoint) location
  - A Network location (UNC location)
- Store all documents in one location
- Optionally specify where files are saved by screen
- Only the links to the location of the files are saved in the Microsoft Dynamics SL database.

What are examples of files that can be uploaded?

- Examples include:
  - Scanned or electronic copies of invoices from vendors
  - Project, Vendor or Customer related correspondence, contracts, or statements of work documents
  - Pictures assocated to orders, purchases or inventory

How do I determine which screens can accept attachments?

- The Attachments setup screen includes features that
  - Limit which screens will allow uploading of documents
  - Specify whether uploaded files can be previewed (in the attachment screen)
  - Limit which screens will allow linking to existing files
- Unlinking a document from a screen does not delete the file.
- Backing up of files is handled by your IT's network or SharePoint policies.

Microsoft®