



## Attaching a Document to a Record in Microsoft Dynamics GP

1. Open the appropriate window in Dynamics GP and select the record.
2. Click on the Note button next to the lookup button.

The screenshot shows the "Vendor Maintenance" window for vendor ATTRACTI00001. The window title is "Vendor Maintenance" and the menu bar includes "Save", "Clear", "Delete", and "Write Letters".

**Vendor Information:**

Vendor ID	ATTRACTI00001	Status	Active
Name	Attractive Telephone Co.	Class ID	USA-US-I
Short Name	Attractive		
Check Name	Attractive Telephone Co.		

**Primary Address:**

Address ID	PRIMARY	Phone 1	(312) 555-0105 Ext. 0000
Contact	Ford Marks	Phone 2	(000) 000-0000 Ext. 0000
Address	P.O. Box 9336	Phone 3	(000) 000-0000 Ext. 0000
		Fax	(312) 555-0105 Ext. 0000
City	Chicago		
State	IL		
ZIP Code	60609-9336		
Country Code			
Country	USA		

**Address IDs:**

Purchase	PRIMARY
Remit To	PRIMARY
Ship From	WAREHOUSE

**Vendor Account:**

Vendor Account	
Comment 1	Fax PO's to Joe
Comment 2	

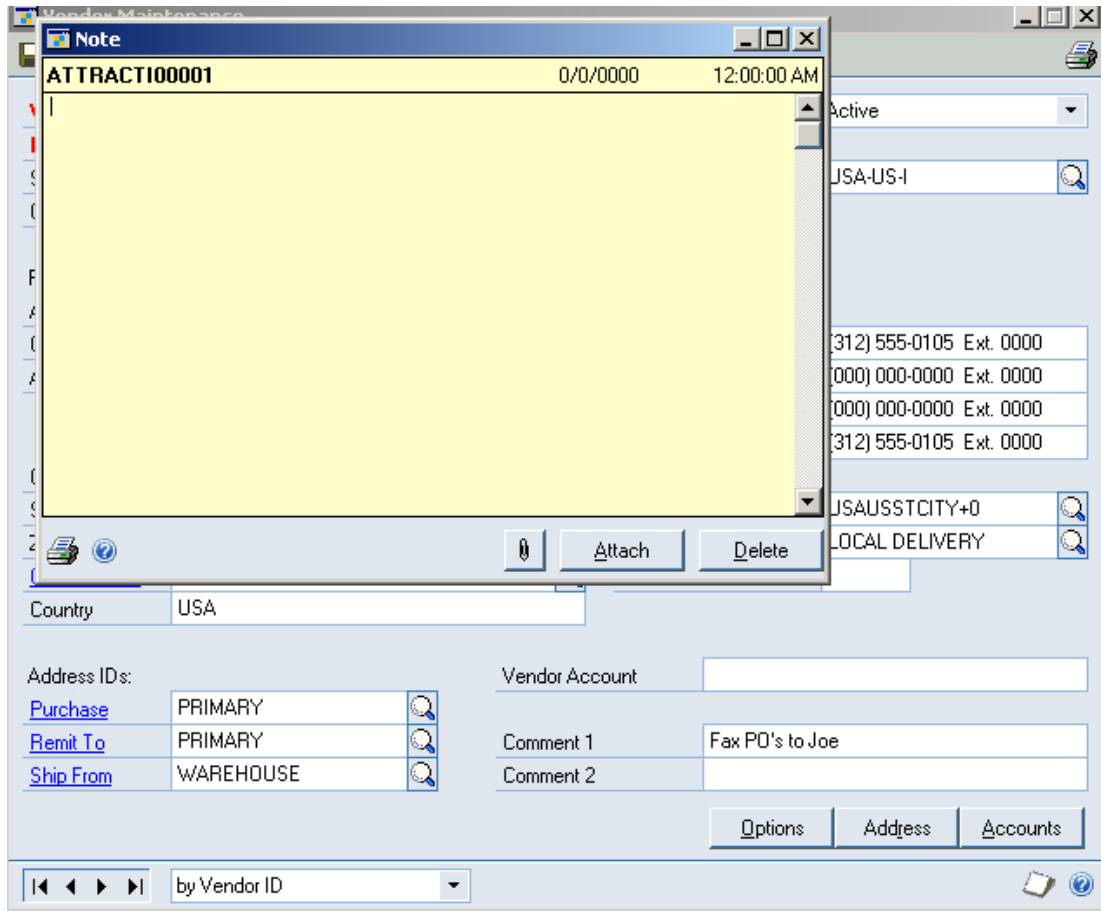
**Other Fields:**

Tax Schedule	USAUSSTCITY+0
Shipping Method	LOCAL DELIVERY
UPS Zone	

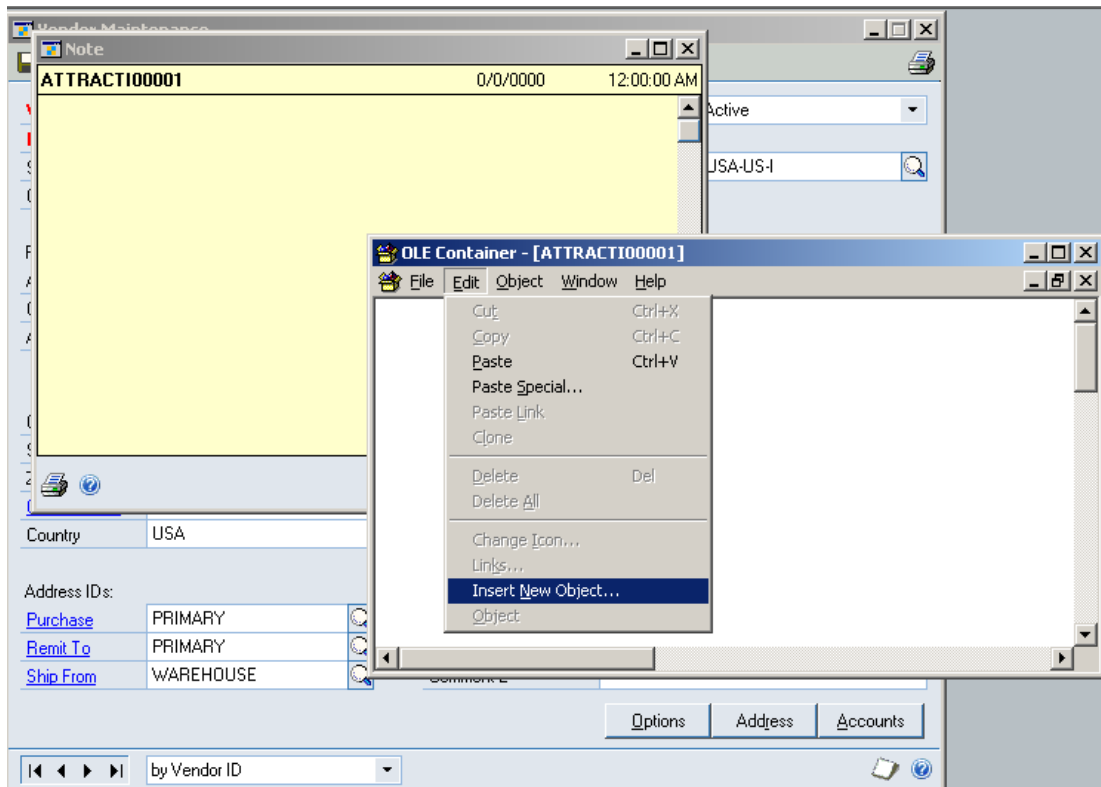
Buttons: Options, Address, Accounts

Footer: by Vendor ID

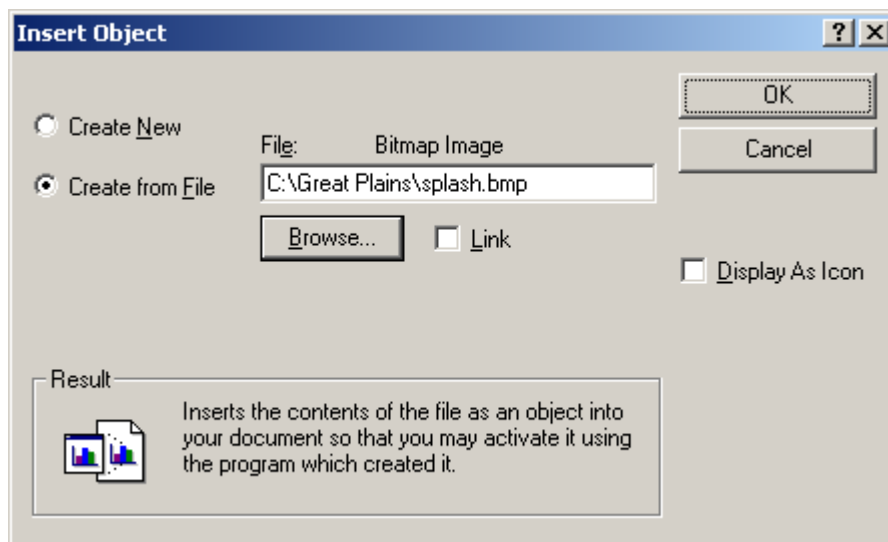
3. The Note window will open. Click on the paperclip at the bottom of the screen.



- The OLE Container window will open. Click on Edit>>Insert New Object.



- In the Insert Object window, click "Create New" and create the document you need, or click "Create from File" to link to an existing document or picture file. Click Browse to select an existing file.

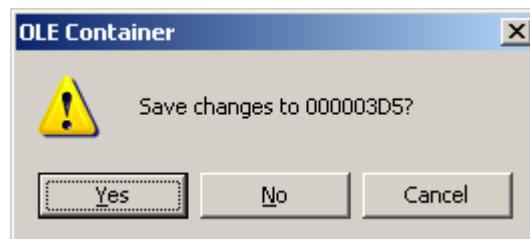


- If you select Link, the OLE link will be updated whenever the file is updated. If you click Display As Icon, the object will appear as an icon, and when it is clicked, it will open in the appropriate program (Word, Excel, Adobe, etc.).

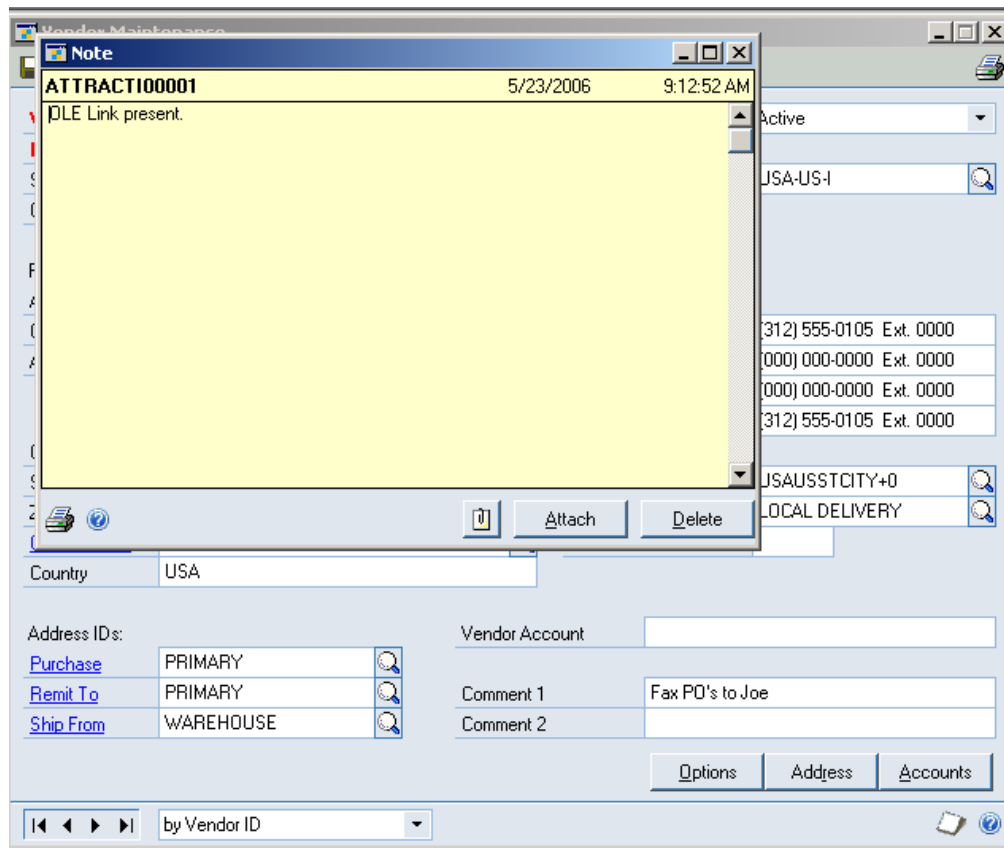
7. Click OK. The file will now appear.



8. Either click File>>Save and close the window, or close the window and click Yes to save the attachment.



9. "OLE Link present" will be entered into the note window by default. You can modify this as desired. Click Attach to save the note.



Notes:

1. All workstations must be pointed to the same location for the notes to show up for everyone.
2. If the document is attached as a link, the file must be in a location that all Dynamics GP users have access to, and each user must use the same path (for example, F:\Dynamics\Document\Splash.bmp).