

Duration: 5 min

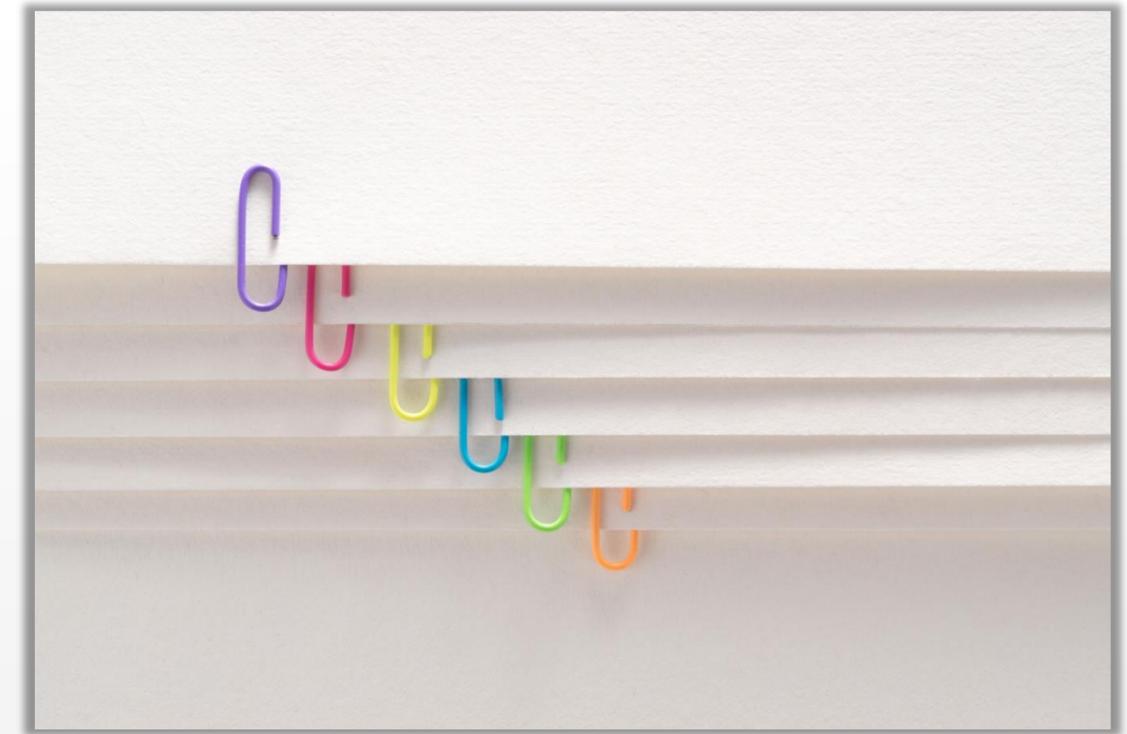
All users

All levels

Best Practice:

Uploading files as Attachments in SAP Business One

CONS€NSUS



Introduction

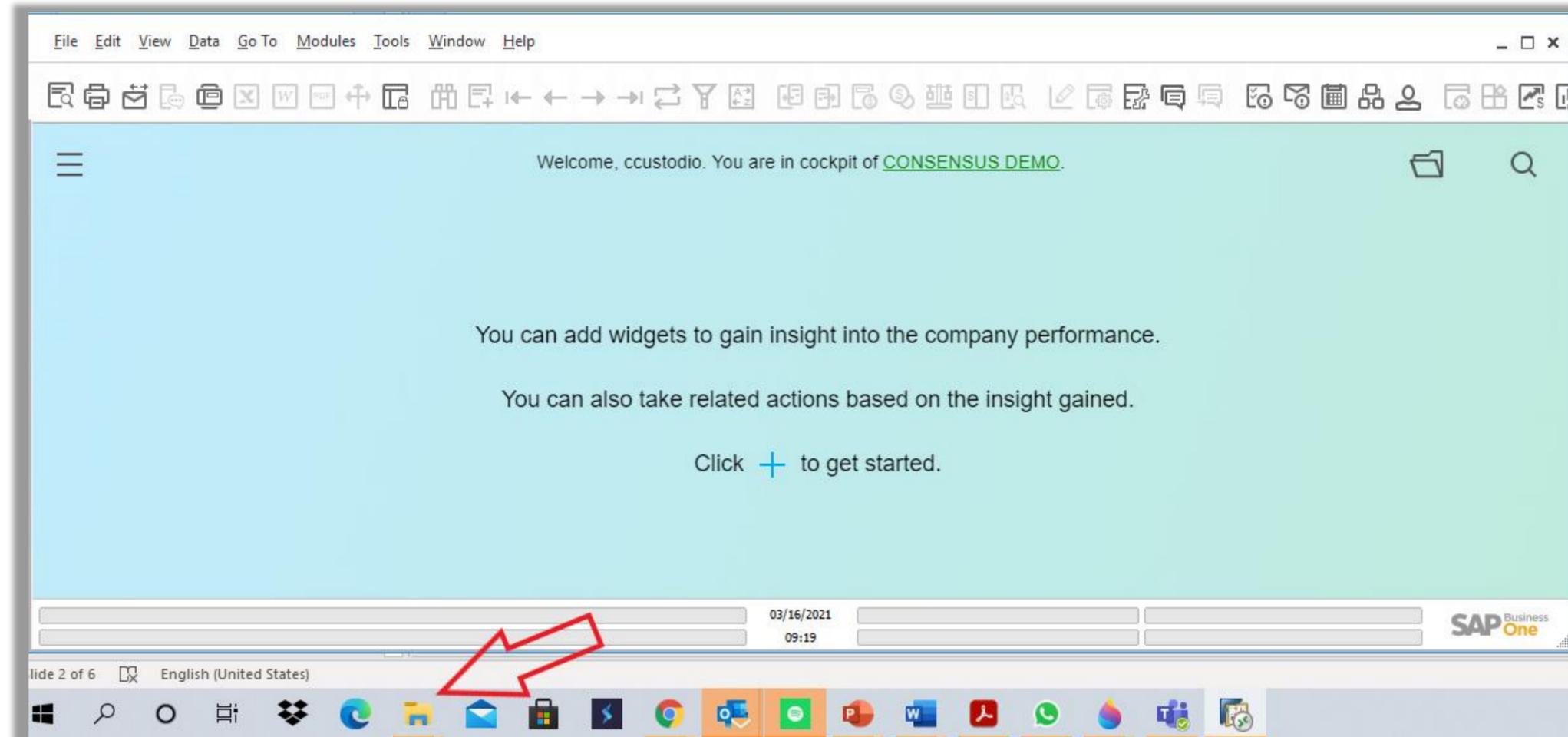


When uploading documents or files from your PC or your local drive to SAP Business One as attachments the browsing process might be slow and even confusing at times. To your server, each user's computer is a remote share* and your RDP** (Remote Desktop Protocol) takes long to list all the directories on that remote share. **For non-IT people **remote share**= network drive, network share (as opposed to local disk and removable devices) ** RDP allows users to control their remote Windows machine as if they were working on it locally (well, almost).*

Please follow the steps described below for a faster and safer way to upload attachments into SAP Business One.

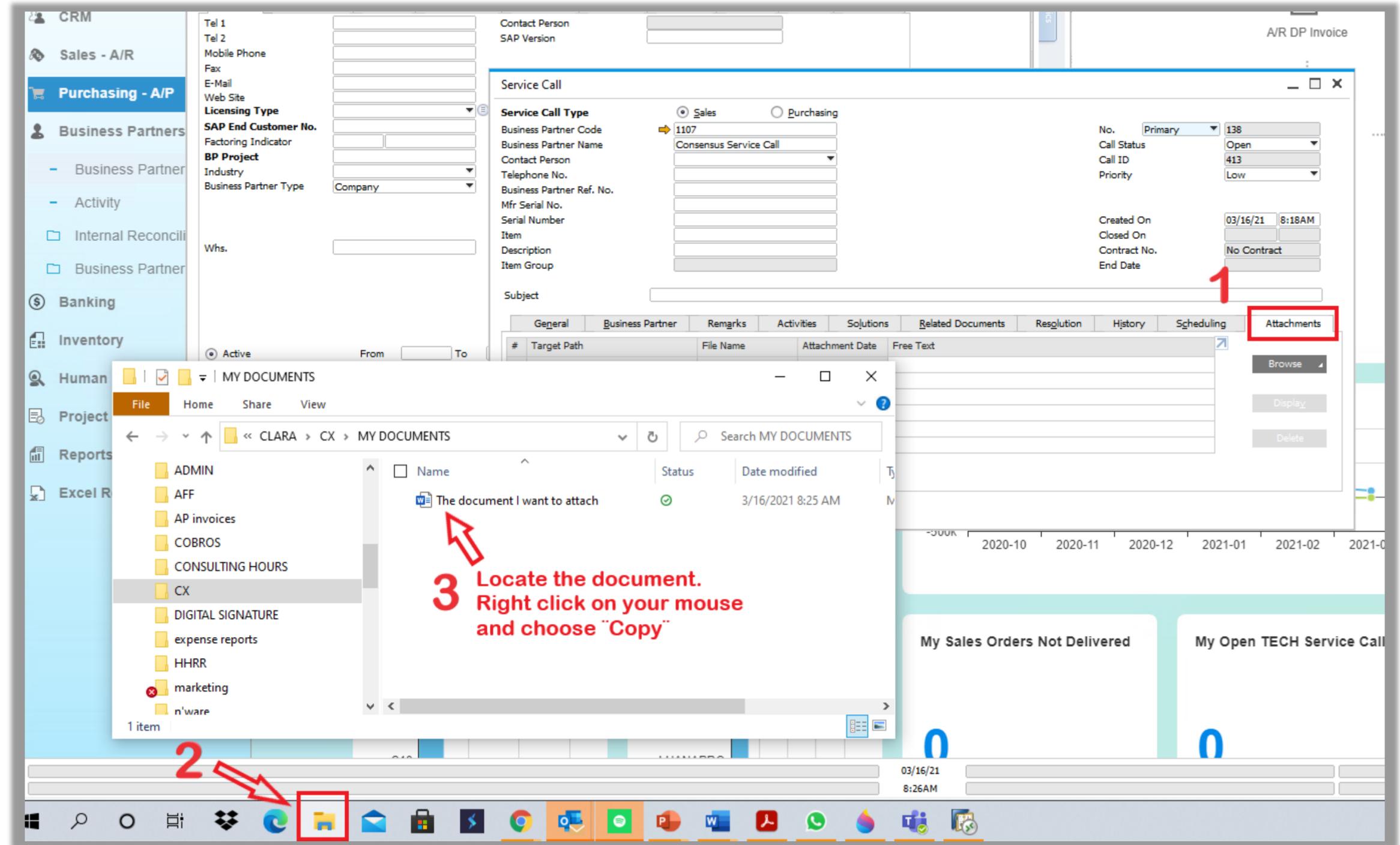
Tip. Have your File Explorer icon visible while working on SAP Business One

You might need to minimize and/or adjust your SAP Business One screen so you can see the icon bar at the bottom of your screen or on the side of it.



Step 1.

1. When ready to upload an attachment, you first have to locate the Attachments tab in your SAP Business One document.
2. Then locate your File Explorer icon in your local drive or PC.
3. Once you locate it, copy it using the right click on your mouse or Ctrl+copy on your keyboard.



Step 2. Your Dedicated Drive Folder

If your system is hosted with our Preferred Hosting Provider, SLAS Consulting, you have a Dedicated Personal Folder on your Server, and you should copy your file to that drive.

To locate your Dedicated Drive Folder:

- Click on the Browse Button
- Click on the option "Browse"
- A new window will open.
- Choose "This PC"
- Scroll down to locate your PersonalFolder (G:)

If your system is deployed in your own server or using a different hosting option, please talk to your Hosting and-or IT Services Provider so they can create a similar Folder for you.

If you have a Business environment, with a domain, a network share and different network drives, those directories could be mapped to your own computer to make the path shorter as well.

Service Call

Service Call Type: Sales (selected), Purchasing

Business Partner Code: 1107
Business Partner Name: Consensus Service Call

No.: Primary 138
Call Status: Open
Call ID: 413
Priority: Low

Created On: 03/16/21 8:18AM
Closed On:
Contract No.: No Contract
End Date:

Subject:

#	Target Path	File Name	Attachment Date	Free Text

Attachments: Browse (highlighted)

Open

Look in: This PC

Quick access: Desktop, Libraries, Network

Libraries: This PC (highlighted)

Network locations (1): PersonalFolder (G:) (highlighted, 645 GB free of 0.99 TB)

Files of type: All Files (*.*)

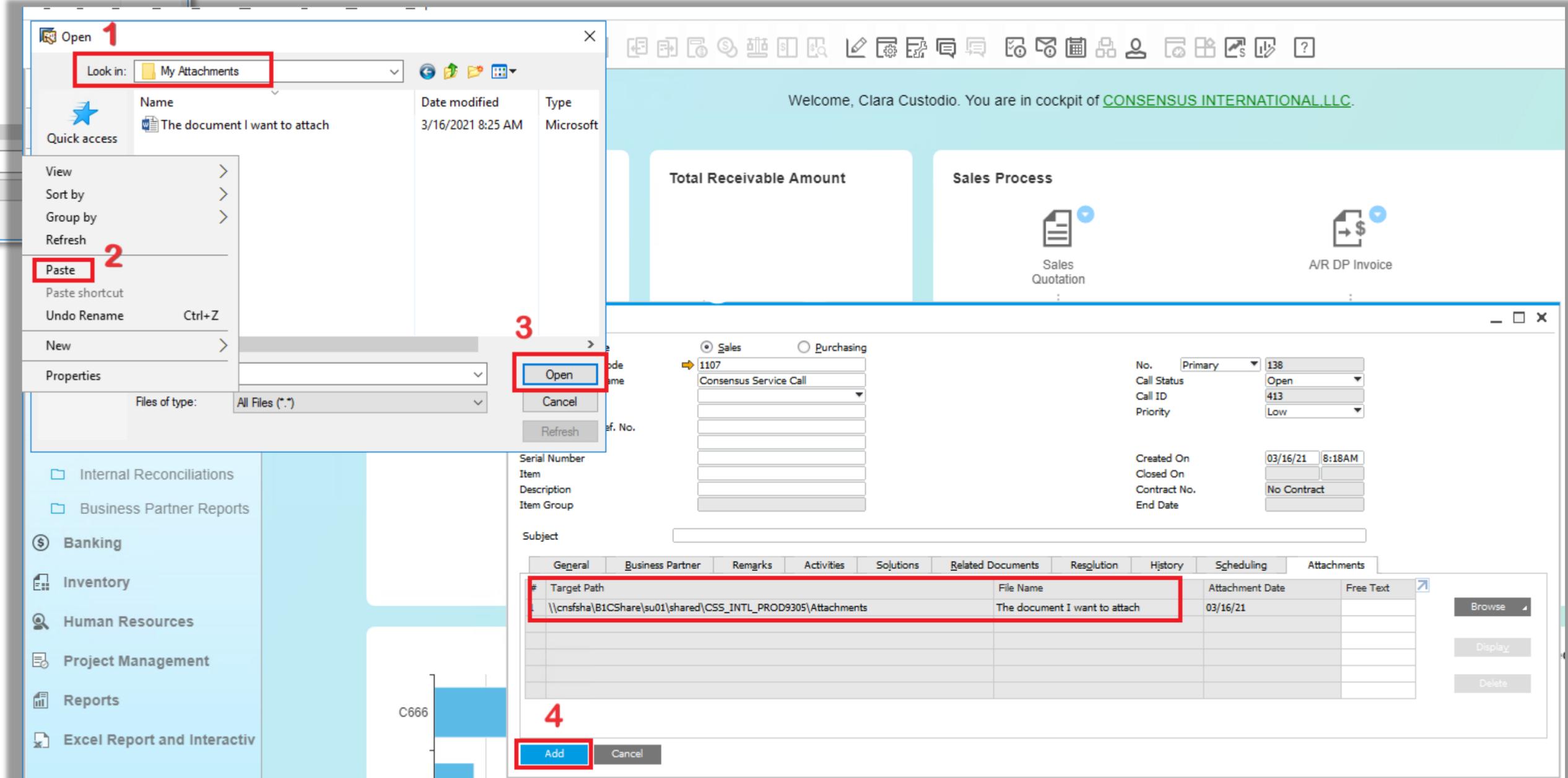
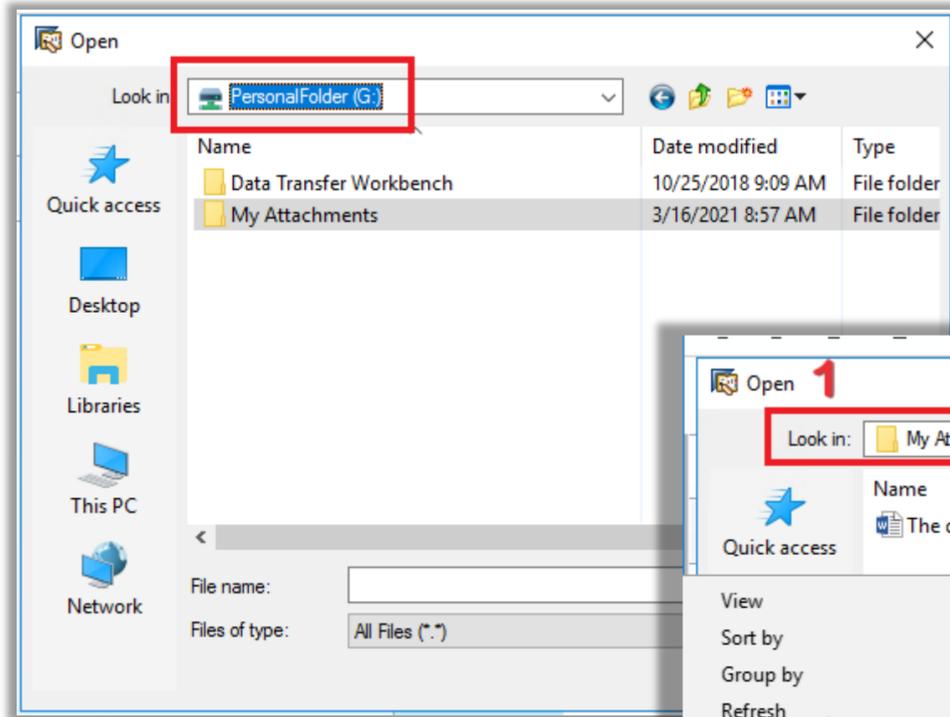
Open, Cancel, Refresh buttons

5 min

Step 3. Save your file and attach it



By default, your PersonalFolder (G:) comes with a Data Transfer Workbench Folder in it. You can create additional Folders if you need them.



1. Choose the folder you want to use
2. Paste the file using the right click mouse function or Ctrl+V on your keyboard
3. Click "Open" to attach the document
4. Confirm by clicking "Add"



A final consideration

Is it possible to copy the document and paste it into the System 's Attachments Folder directly?

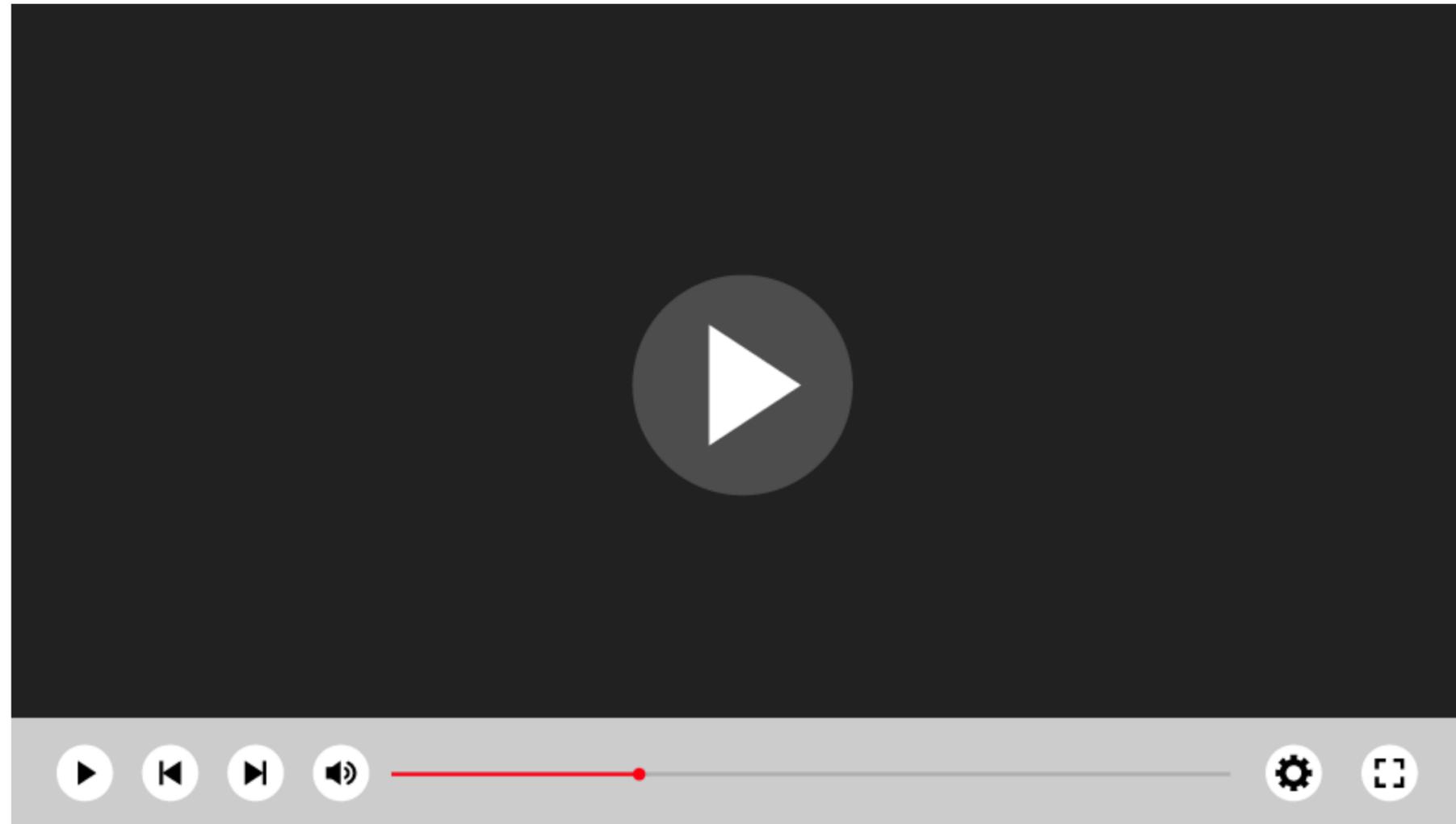
Short answer is > Yes, however this practice is not recommended.

For IT users>

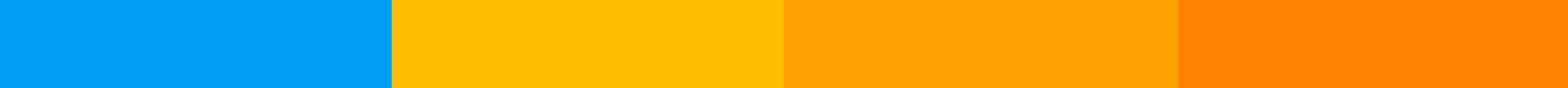
SAP Business One copies every document or file you attach and it pastes it into the Attachment Folder of the Server.

On top of that, the Cloud manages permissions on files that are placed on the directories when users are assigned to the tenants, so dropping files directly into the server Attachments Folder could modify slightly those permissions and might create a problem for other users to see those files.

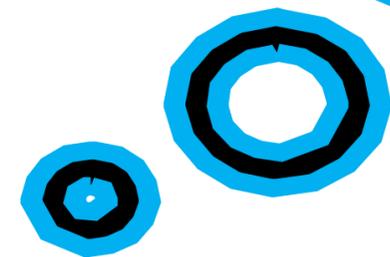
Want to see a quick video? (4:37 minutes)



Best Practice: Uploading Files as Attachments
in SAP Business One



**If you have any question,
please don't hesitate
to contact us!**



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