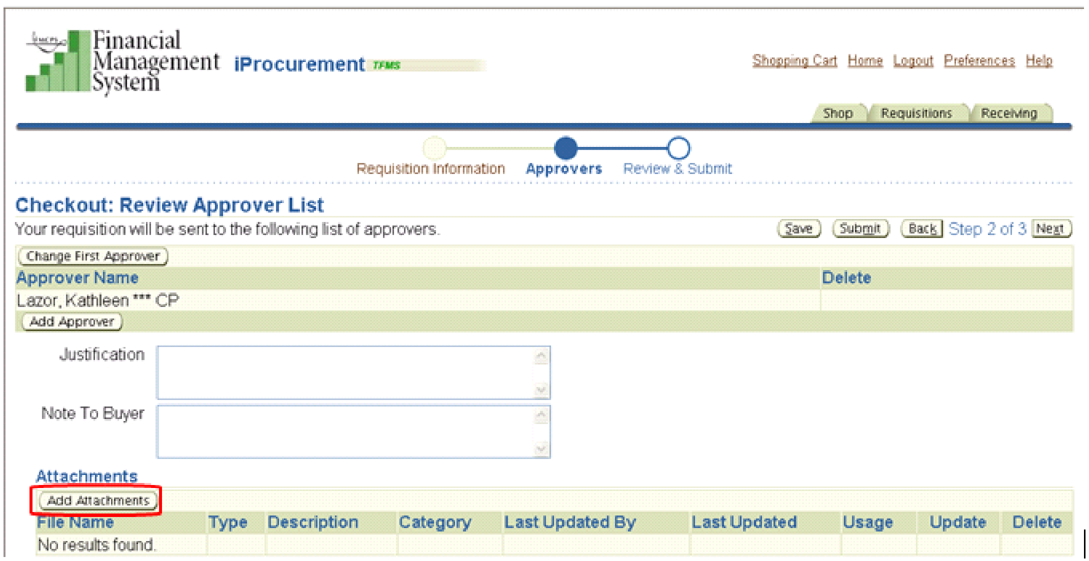
Adding an Attachment to a Requisition During Checkout

If important information and/or instructions need to be communicated regarding an order, attachment(s) can be added to a requisition during *Step 2* of the *Checkout* process. More than one attachment can be placed on a requisition. Attachments do not automatically open when the order is going through the approval process. To alert the workflow approvers of attachment(s), add a message in the *Justification* and *Note to Buyer* fields. A few examples of when to use an attachment would be:

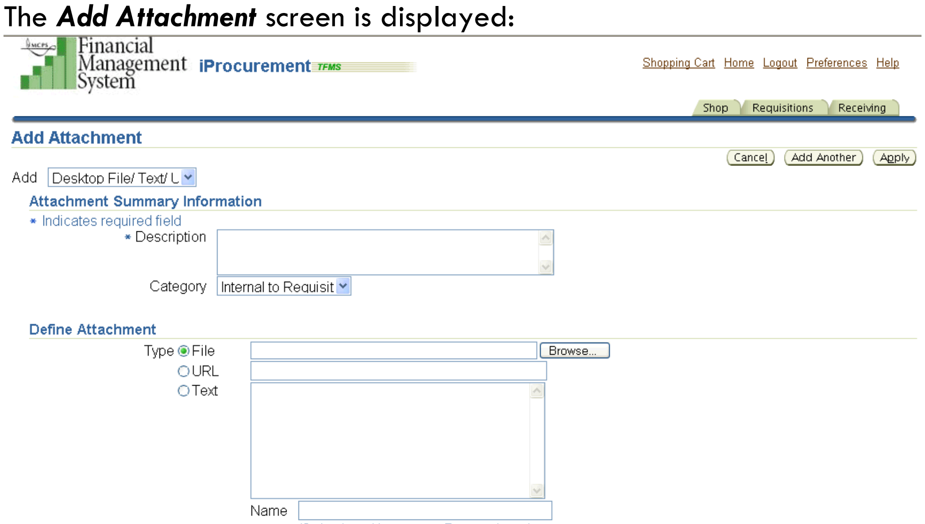
- Pricing from suppliers if the dollar amount threshold requires quotes for buyer review.
- Inform a supplier of a delivery date that ordered items need to be received.
- Copy of a catalog page of the item(s) being ordered to assist the account manager, additional workflow approvers and the buyer.

Adding an Attachment During Step 2 of Checkout:

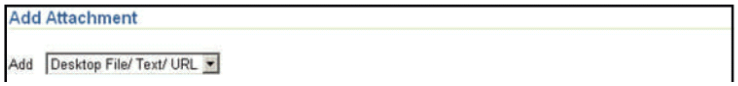
1. Click the **Add Attachments** button:



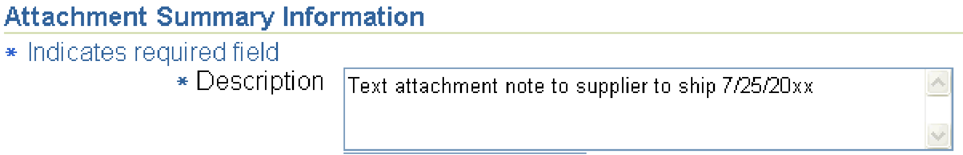
2. The ***Add Attachment*** screen is displayed:



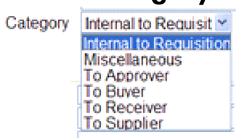
3. In the **Add** field leave the default *Desktop File/Test/URL*



4. In the **Description** field enter an appropriate description of the attachment.



5. In the **Category** field choose the appropriate person the attachment is intended for.

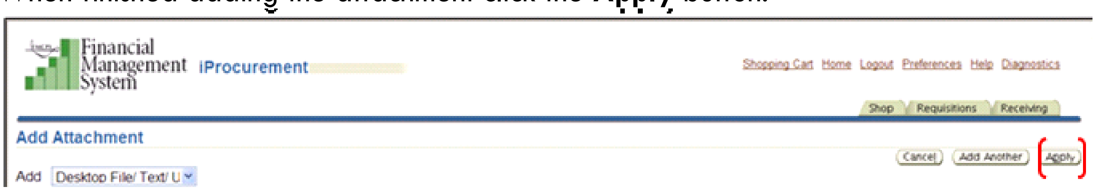


6. In the **Define Attachment** field, click the appropriate *Radio Button* for the ***Type*** of attachment you are creating.

   - If ***Type*** is **File**, select that *Radio Button* and click the **Browse** button to find the attachment.
   - If ***Type*** is **URL**, select that *Radio Button* and copy and paste the website address in the field.
   - If ***Type*** is **Text**, select that *Radio Button* and copy and paste the message used in the **Description** field.

7. In the **Name** field, enter a name for the attachment, if desired.

8. When finished adding the attachment click the **Apply** button.



9. A confirmation message is displayed that the attachment has been added, but <u>not</u> saved. **Click the Save button.** If the **Save** button is not chosen, the attachments will <u>not</u> appear on the PO and will not be communicated to your intended audience.

10. If another attachment needs to be added to the requisition, click the **Add Another** button and repeat the steps above.

11. After adding the attachment(s), use the *Justification* field and/or *Note to Buyer* field to inform the approvers of the attachment(s).