How to attach documents to an Order Write-up Sheet

Please follow these instructions to attach documents such as P.O.s in eRapid.

Prerequisites:

a. A file in an accepted format (see below) saved to a folder on your hard disk
b. Allow at least read access to your hard disk for Citrix (one time only)

Accepted file formats: PDF, Word(doc, docx), Excel(xls) , Text(txt), Rich Text(rtf), Tiff(tif), JPG, GIF

How to allow Citrix read/write access to your hard drive:

a. Log on to Citrix and start eRapid from the Virtual Office desktop

b. Double-click the icon that looks like a white square with a red dot: , commonly located at the bottom-right of your screen, in the system tray, close to the volume control

c. In the window that pops up, titled 'Program Neighborhood Connection Center', click the button
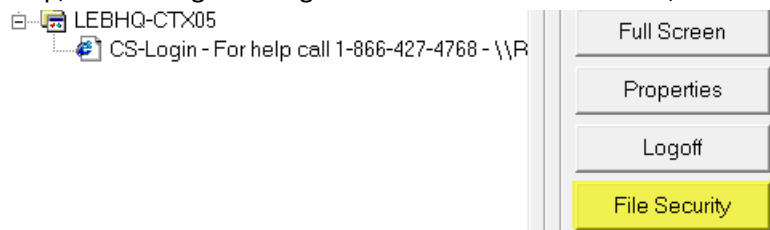

   labeled 'File Security':
d. In the new window that pops up, set the Access Level to 'Read Access' or to 'Full Access' if you prefer to be able to save eRapid quotes, tear sheets or order write-ups to your hard disk. Also, set the 'Never ask me again' radio button so that the system remembers these settings.
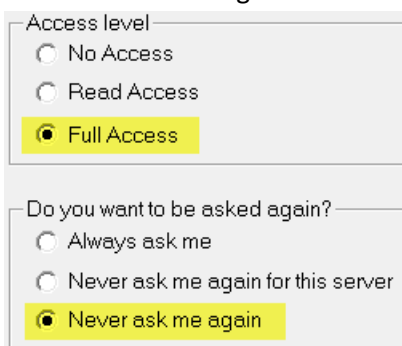
e. Click the 'OK' button to close the current window and again to close the connection center.
f. This operation only needs to be performed once, unless your Citrix client application is upgraded or re-installed.

How to attach a document:

a. Open your order in eRapid or convert your quote to an order and navigate to the Line Item List.
b. Click the 'Order Write-up Sheet' button at the bottom of the page and follow the instructions.
c. Fill out the fields on the first two pages and save. You should now be on Page 3. Towards the bottom-right of Page 3 you will see the 'Upload Files' button.
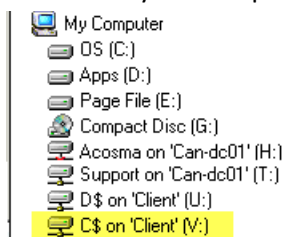
Attach Additional documents: **Upload Files**
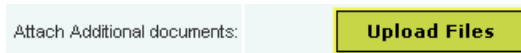
d. After you click it, a new window pops up. To choose the file you want to upload, click the 'Browse' button.

Choose the file To Upload: [   ]   Browse...

e. Click the black arrow pointing down next to the 'Look in:' box

Look in: Desktop   ▼
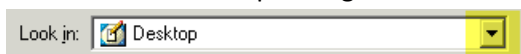
f. After a few seconds you will see a list of drives. Your C: drive will be listed as 'C$ on Client (V:)'. If you have more than one hard drive or network drives, you will see them all listed. For example, drive D: on your computer will be listed as 'D$ on Client (U:)'. Select the one you want from the list.
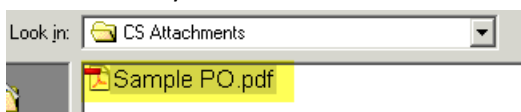
My Computer
OS (C:)
Apps (D:)
Page File (E:)
Compact Disc (G:)
Acosma on 'Can-dc01' (H:)
Support on 'Can-dc01' (T:)
D$ on 'Client' (U:)
C$ on 'Client' (V:)

g. You will see the familiar folder structure on your disk. Navigate to the folder you need and double-
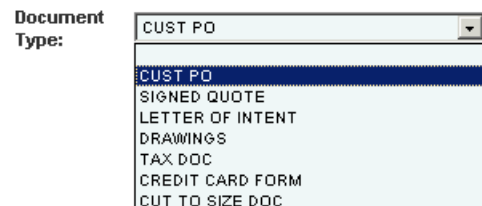
C$ on 'Client' (V:)

AuthLog
Autodesk
CS Attachments
DRIVERS

click it. In this example it's called 'CS Attachments'.

h. Select the file you want to attach and click 'Open' to complete the attachment.

Look in: CS Attachments   ▼

Sample PO.pdf

Please not that files are scanned for viruses before they are stored. Infected files will not be transferred and you will get a notification. Delete that file from your computer to be safe.

i. You will now be back at the attachments screen. Select a document type from the list:

Document Type: CUST PO   ▼

CUST PO
SIGNED QUOTE
LETTER OF INTENT
DRAWINGS
TAX DOC
CREDIT CARD FORM
CUT TO SIZE DOC

Upload file

j. Click the 'Upload File' button to transfer the file.
k. Repeat the process (steps d. h. i. j.) until all attachment files are uploaded to the C/S server.
l. Close the small attachments screen by clicking the 'X' at the top-right. Page 3 will now show a list of attached files.