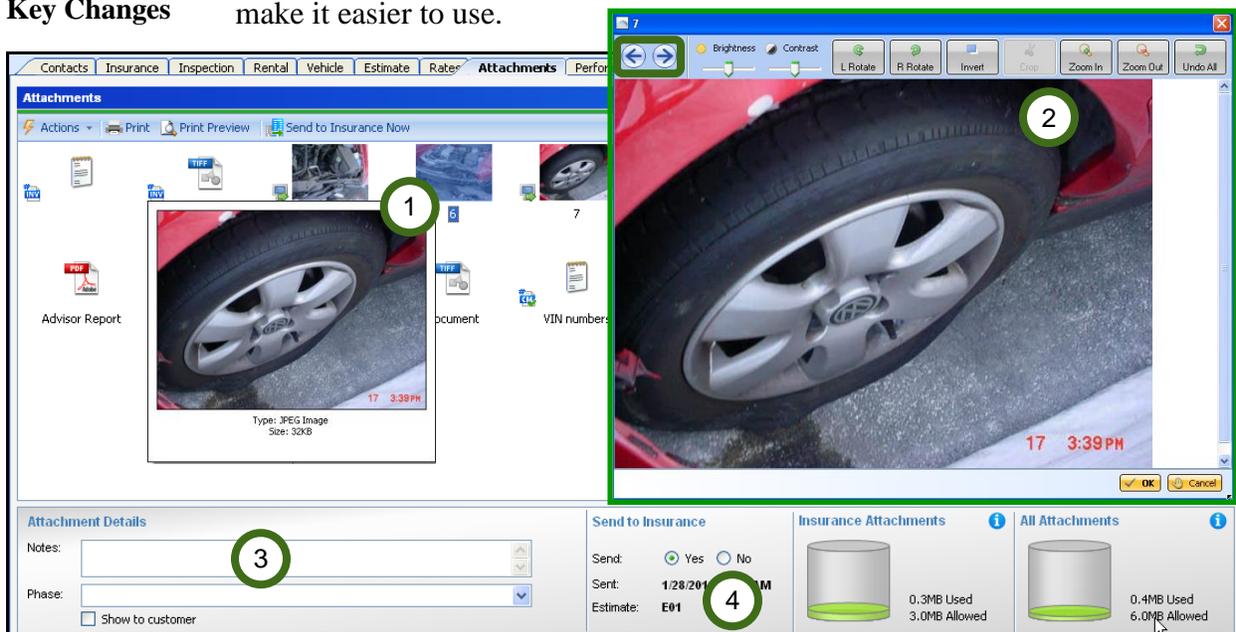


## Job Aid: Attachment Tab Updates

**Purpose** This job aid describes the new Attachment Tab design and the enhancements that were included. Key topics include:

- New Layout
- Communicate Attachments added to locked Estimates without creating a Supplement first.
- Add Attachments to a Closed Workfile.

**New Layout Key Changes** As you can see here, the layout has changed, adding some new features to make it easier to use.



Feature	Description
1) <b>View Image</b>	Use arrow keys, Tab key to move from image to image. Hover over an image to see a thumbnail of that image.
2) <b>Edit Image</b>	Double click an image to edit it. Use the  to move from image to image without closing the window.
3) <b>Details</b>	Add notes or select phase. Click <b>Show to Customer</b> to add to Consumer Website.
4) <b>Send to Insurance</b>	Click an image or PDF then use the radio buttons to identify if that attachment should be sent.

*Continued on next page*

## Job Aid: Attachment Tab Updates, Continued

### Send Attachments without Supplement

**Problem:** You need to send additional images or attachments to the Insurance Company after locking the Estimate.

**Answer:** Use the following steps to add images or PDF documents to workfiles without creating a supplement:

Step	Action
1	Go to the <b>Attachments Tab</b> of the workfile.
2	Add new images using the <b>Actions &gt; Attach</b> function.
3	Click on the image to select it. <b>Send to INS Now</b> button appears.



4	Click the <b>Send to INS Now</b> button to communicate the attachments back to the Insurance Company.
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### Add Images to Closed Workfiles

**Problem:** There may be business reasons that you need to add additional attachments to a Closed Workfile. Examples: Invoices, Credits, etc.

**Answer:**  
Go to a Closed Workfile, add attachments using **Actions>Attach From** and Save the Closed Workfile with those attachments.

