

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 LayoutAs you can see here, the layout has changed, adding some new features to
make it easier to use.



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

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Job Aid: Attachment Tab Updates, Continued

Send Attachments without	<i>Problem:</i> You need to send additional images or attachments to the Insurance Company after locking the Estimate.
Supplement	Answer: Use the following steps to add images or PDF documents to workfiles without creating a supplement:

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



attachments back to the Insurance Company.

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:	🕋 1205 - Trout, Rainbow - 2010 HOND CIVIC VP 4D SED 4-1.8L-FI - Repair Orde
Go to a Closed	File View Actions Help
Workfile, add	📕 Save 📕 Lave and Close 🛛 🚔 Print 📄 New 👻 😰 Reopen
attachments	NO IN 1205 Owner: Trout, Rainbow
using	Estimator: Dan Insurance:
Actions>Attach	Repair Order 1205 - CLOSED
From and Save	Contractor Inguance Increaction Republic Patients Rates Attachmenter
the Closed	
Workfile with	Attachments
those	General Actions - Rint Q Print Preview
attachments.	POF L
	Advisor Report InvoiceAfterClose