Attachments Tab

Overview

This document describes how to add additional attachments to a locked or closed Workfile.

Locked Estimate – Send Attachments

To send additional attachments to an Insurance Company after the Estimate has been locked without creating a supplement, follow the steps below:

Step	Action
1	Open the appropriate **Workfile.**
2	Open **Attachments** tab.
3	Select the **appropriate attachment**.
4	Click **Send to Insurance Now**. The attachment is communicated to the Insurance Company.
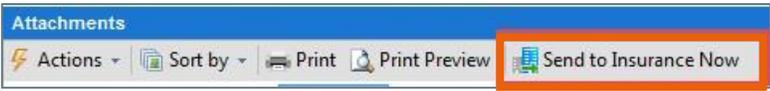
Closed Workfile – Add Attachments

To add additional attachments to a closed Workfile, such as invoices or credits, follow the steps below:
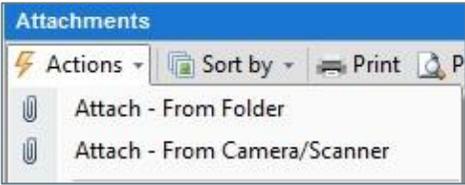
Step	Action
1	Open the closed **Workfile**.
2	Open the **Attachments** tab.
3	Select **Actions > Attach From Folder** or **Attach From Camera/Scanner.**
4	Select the **attachment(s)** to add.
5	Save the **Workfile**.