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INFORMATION SERVICES INC.

Job Aid: Attachment Tab Layout

Purpose This job aid describes the Attachment Tab design. Key topics include:

- Overall 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 is easy to navigate.
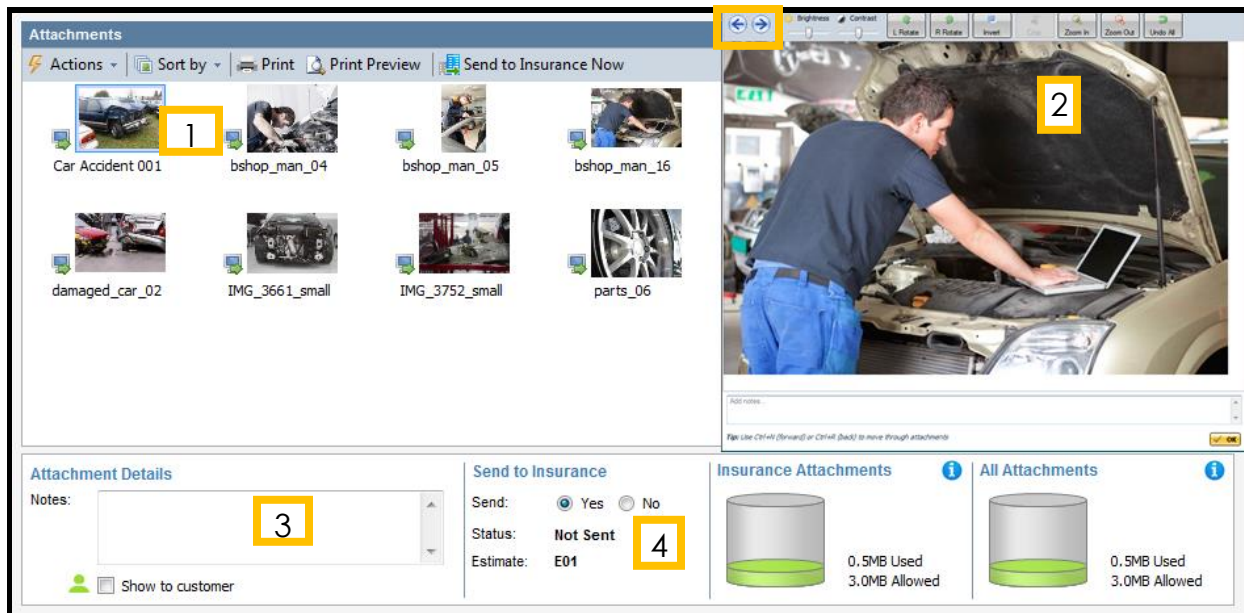
| Feature	Description
1) **View Image**	Use arrow keys, Tab key to move from image to image.
2) **Edit Image**	Double click an image to edit it. Use the to move from image to image without closing the window.
3) **Details**	Add notes or select phase. Click **Show to Customer** to add to Consumer Website.
4) **Send to Insurance**	Click an image or PDF then use the radio buttons to identify if that attachment should be sent.

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Job Aid: Attachment Tab Layout, 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 **Attachments Tab** of the workfile.
2	Add new images using the **Actions** > **Attach** function.
3	Click on the image to select it. **Send to Insurance Now** button appears.
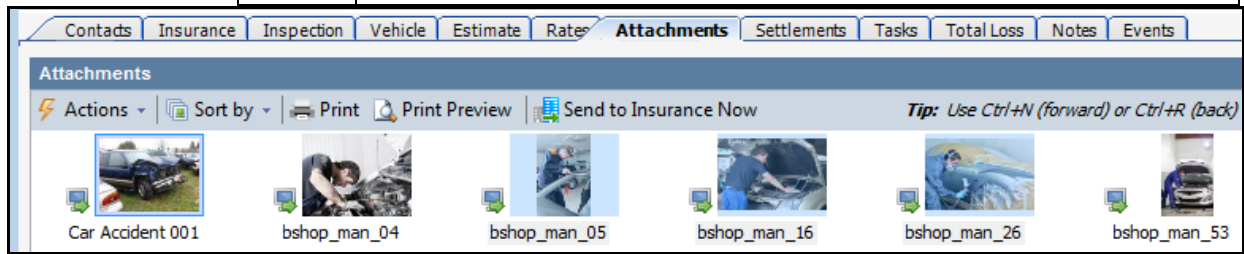
4	Click the **Send to Insurance Now** button to communicate the selected attachments back to the Insurance Company.

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