

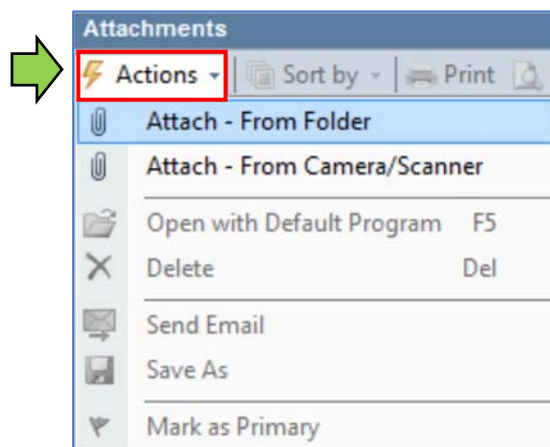
Job Aid: Send Attachments

Overview There are two ways to select attachments and then send them to the Insurance Company.

- 1) **With a Locked Estimate:** Select photos and PDFs to upload when you lock the Workfile. Photos default to YES. PDFs default to NO.
- 2) **After the Estimate is Locked:** Select photos and PDFs to upload *after* you have locked the estimate.

This job aid describes how and when to use each feature.

With Locked Estimate Scenario: You are writing your Estimate and you are on the **Attachment tab**. Add photos and PDF files as you need using the **Actions** sub-menu:



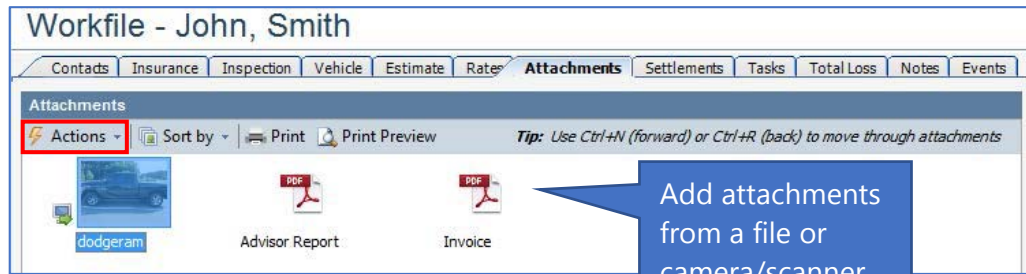
Use the following steps to identify which photos and PDFs should be sent with the workfile when you lock the Estimate:

Step	Action
1	Go to the Workfiles View, locate the desired Workfile, and double-click to open it
2	Go to the Attachments tab .
3	Use the Actions menu to add photos and PDF attachments to the Workfile.

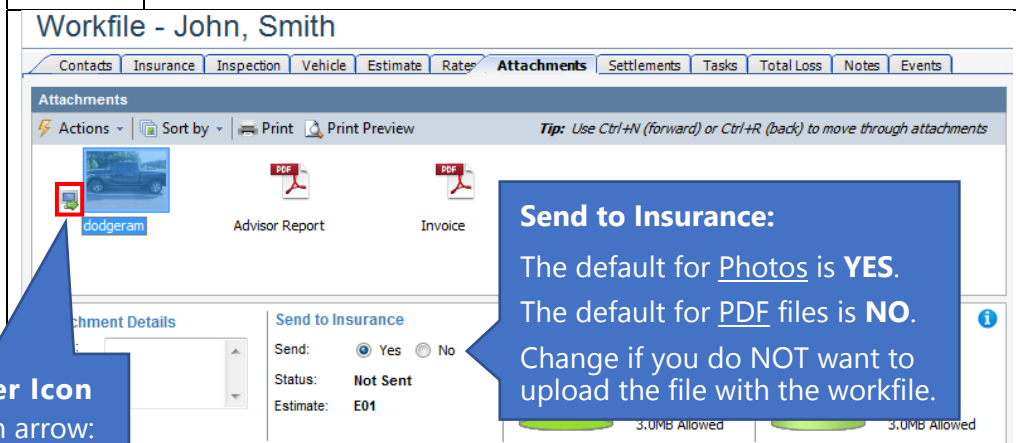
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Job Aid: Send Attachments, Continued

With Locked Estimate
continued



Step	Action
4	Mark each attachment as either Send to Insurance (YES) or (NO) before you lock the Estimate.



The **Computer Icon** with the green arrow:



indicates that this attachment is set to Send to the Insurance Company.

You can also sort by flagged attachments.

When you're finished with all the attachments, **Save** the Workfile.

When you lock the Estimate (or Supplement), all photos and PDFs identified as Send to Insurance will upload with the Workfile.

NOTE: If you do create a Supplement later, anything flagged to send that has **not already been sent** will automatically get uploaded when you lock the Supplement.

Job Aid: Send Attachments, Continued

After Estimate is Locked

Scenario: You have already locked the Estimate. You need to resend or add more photos or PDFs to the Workfile and send them to the Insurance Company without creating a new Supplement.

Use the following steps to identify new, additional photos and PDFs to send to the **Insurance Company Now** after the Estimate is locked.

Step	Action
1	Open the locked Workfile and go to the Attachments tab.
2	Use the Actions menu to add the new photos and/or PDFs attachments to the Workfile.
3	Click on a new photo or PDF to select it.

4	Mark the first new photo or PDF as Send to Insurance .	
5	While the attachment is still selected, click Send to Insurance Now .	
6	When prompted, click YES to confirm you want to send the attachment now.	
7	Repeat for each additional photo or PDF.	
<p>TIP! Select more than one photo or PDF at a time, and click Send to Insurance Now. All your selected attachments will go up at once.</p>		