Customer Profile: Manage Attachments

Under the **Attachments tab** of the Customer's Profile, upload and save things such as pictures, site maps, special install manuals, or any additional contract with the customer. Attachments can also be made visible on the field employees' **IndusTrack mobile**.

The **Attachments List** contains a listing of all the different documents or files relevant to your client's account or associated with a job or task that have been uploaded via the page. It also includes a link to the attached document. Click on this to open the file.

The details that are shown on the listing are:

- Date when the file was attached
- The Service Location where the attachment applies to
- The Job # associated with the attachment
- The Task associated with the job
- The email of the one who uploaded the file.
- The hyperlinked file name. Clicking on this will open the document/file in a new tab.
- Any notes that have been entered

Click on the table header to **Sort** the list alphabetically according to the selected header.

Use the **Filter Bar** to quickly find an attachment.

Use the **Clear Filter button** to remove the filter settings.

Select the number of attachments to be displayed per page. Options to choose from are 10, 25, 50, and 100. Use the Previous and Next buttons to move from one page to another (if there is more than one page).

Use the **Add New** button to upload an attachment.

Add an Attachment

To attach a file, click the **Add New** button.

The **Add New Attachment** window will come up.

Fill in the details. Fields with ***** are required.

Upload a file/document on the **Attachment*** field.

To upload the file, use the **Choose File button**. You can attach contracts, instruction manuals, images, site maps, and other files. The maximum allowable size is 15 mb.

Add notes about the attachment or the associated job or any notes as needed.

To make an uploaded sitemap or instruction manual or any uploaded file visible to field employees via the IndusTrack mobile, be sure to tick the **site map checkbox**.
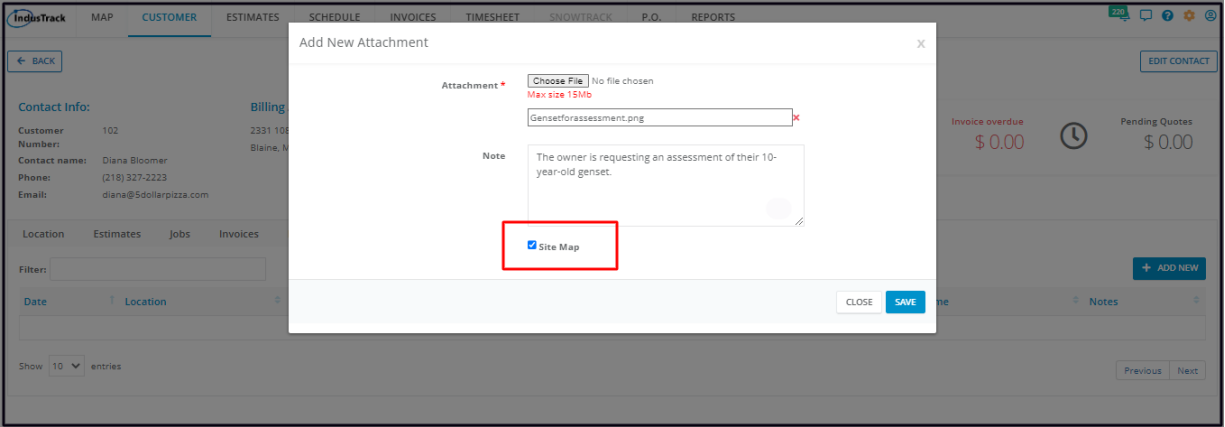
Save the new attachment. The file will be added to the listing.
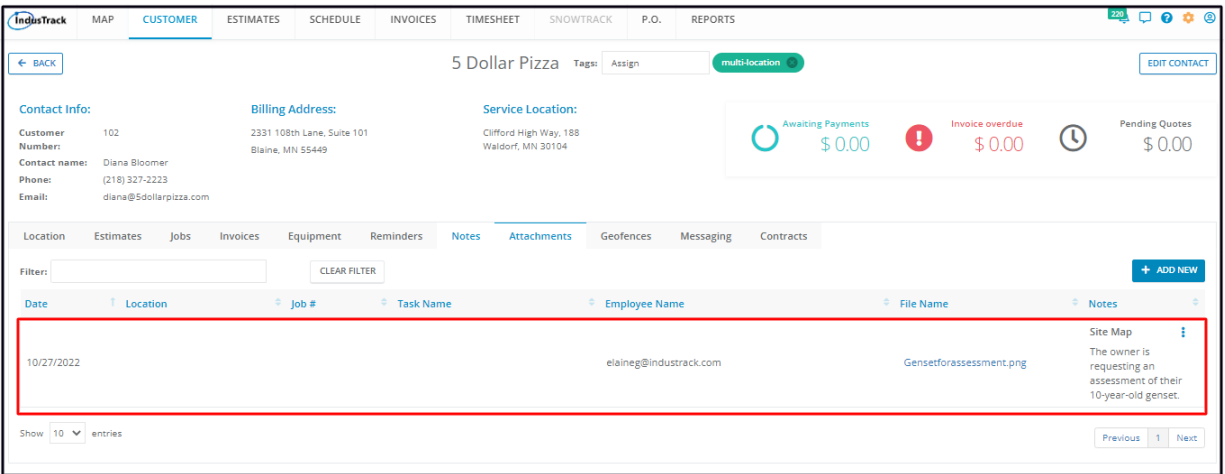
Only one document or file can be uploaded to each attachment record. If you have multiple documents to upload, create separate attachment records for each.

Edit an Attachment

Find the Attachment Record to be updated from the List. Go to the 3-dot menu to its right and select **Edit**.

Update the record as needed. **Save** once done.

Edit an Attachment – Replace an Attached File

Find the Attachment Record to be updated from the List. Open this in edit mode.

Upload the new document. This will overwrite the existing attached file. Save once done.

Delete an Attachment Record
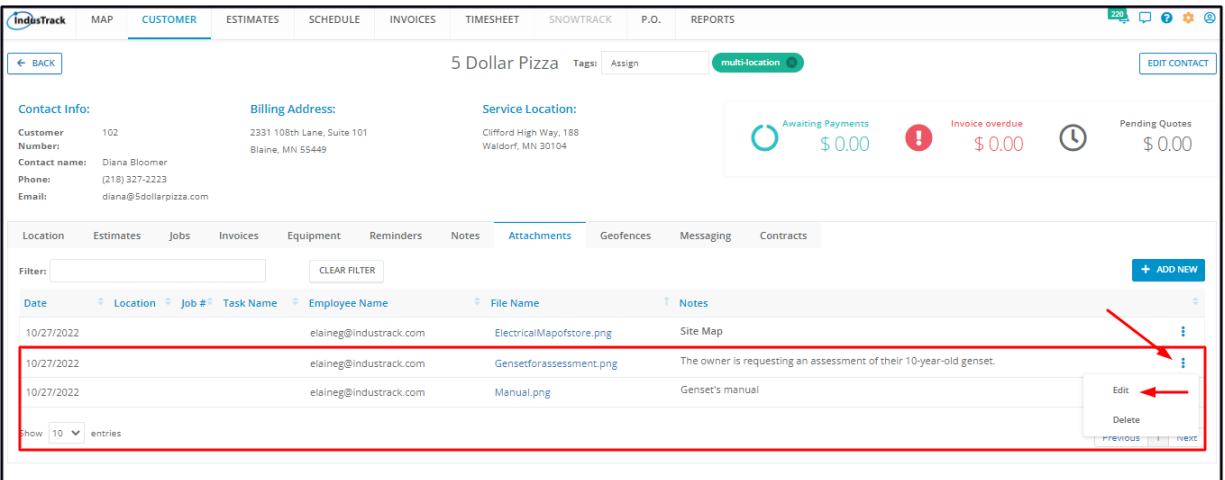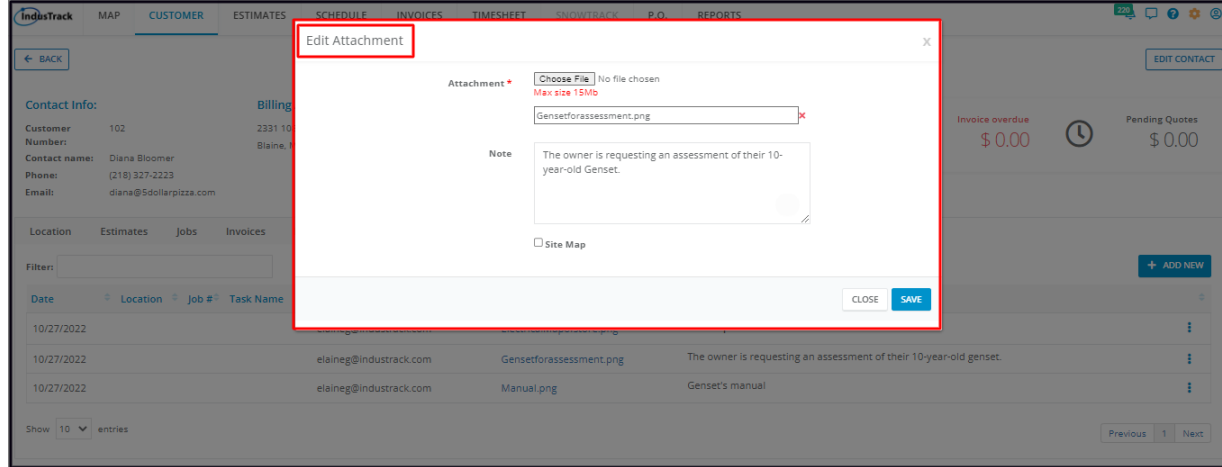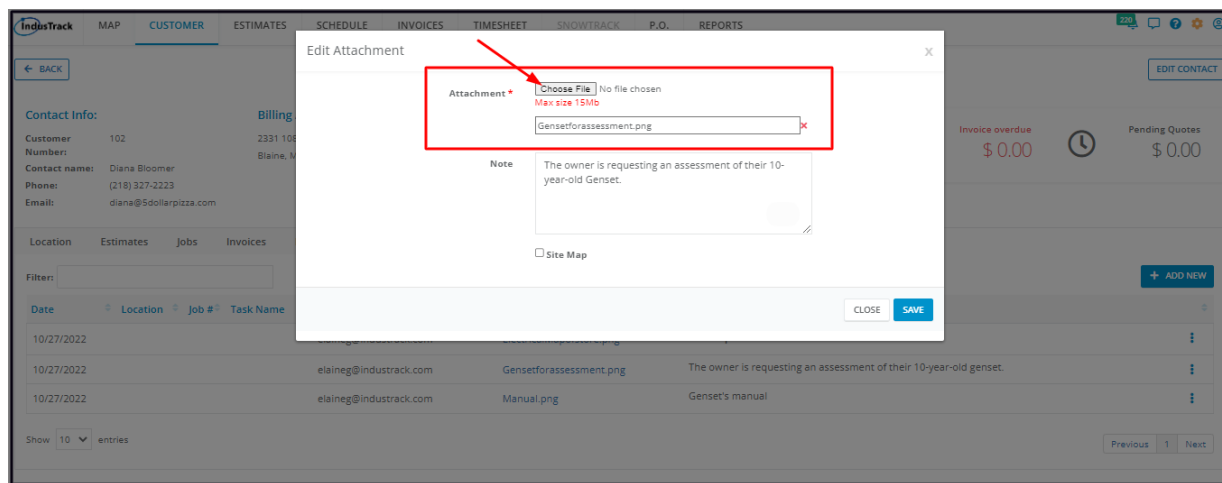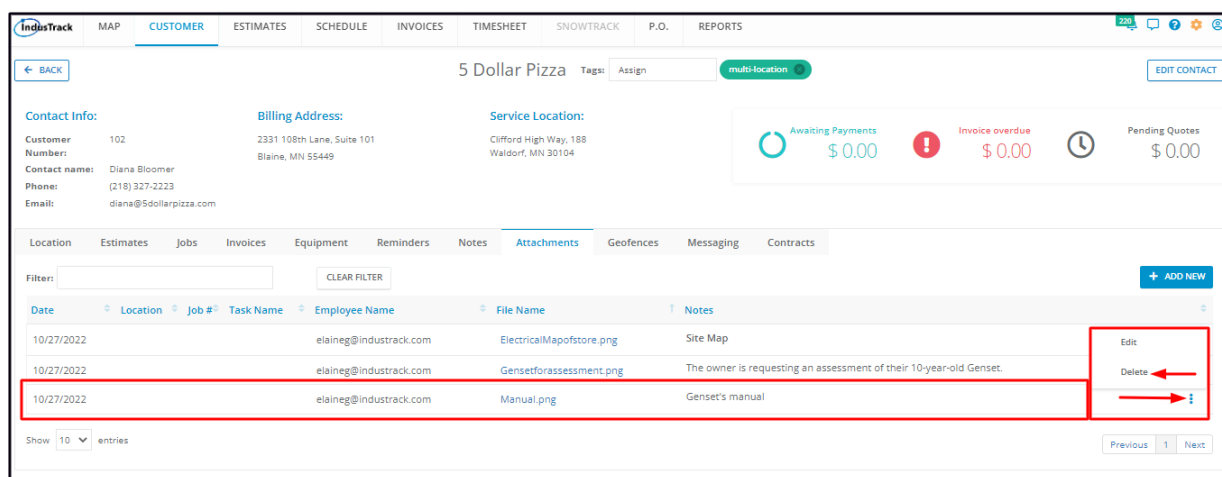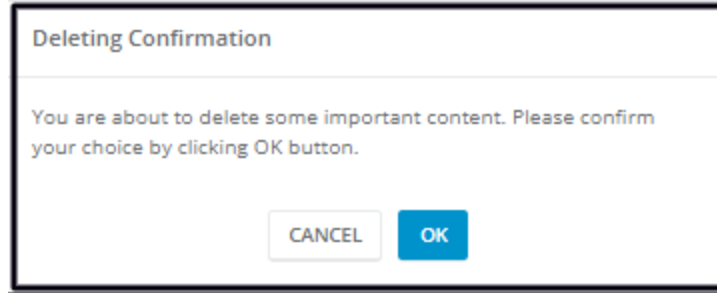
Delete a Customer's Attachment that is no longer being used or was created in error. It is wise to exercise caution when using this function. Deleting a client's record may have an effect on other functions, settings or data. This action can not be undone.

Find the Attachment Record to be deleted from the List. Go to the 3-dot menu to its right and select **Delete**.

From the **Delete Confirmation window** that will come up, select **OK** to continue with the deletion. Select **Cancel** to abandon the action.

Deleting Confirmation

You are about to delete some important content. Please confirm your choice by clicking OK button.

CANCEL   OK

The Attachment will be removed from the list.