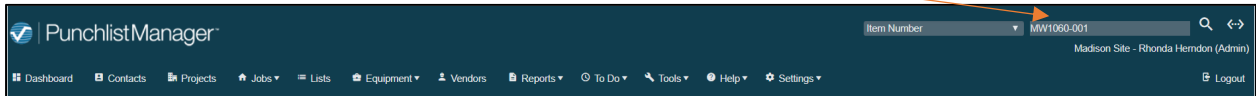


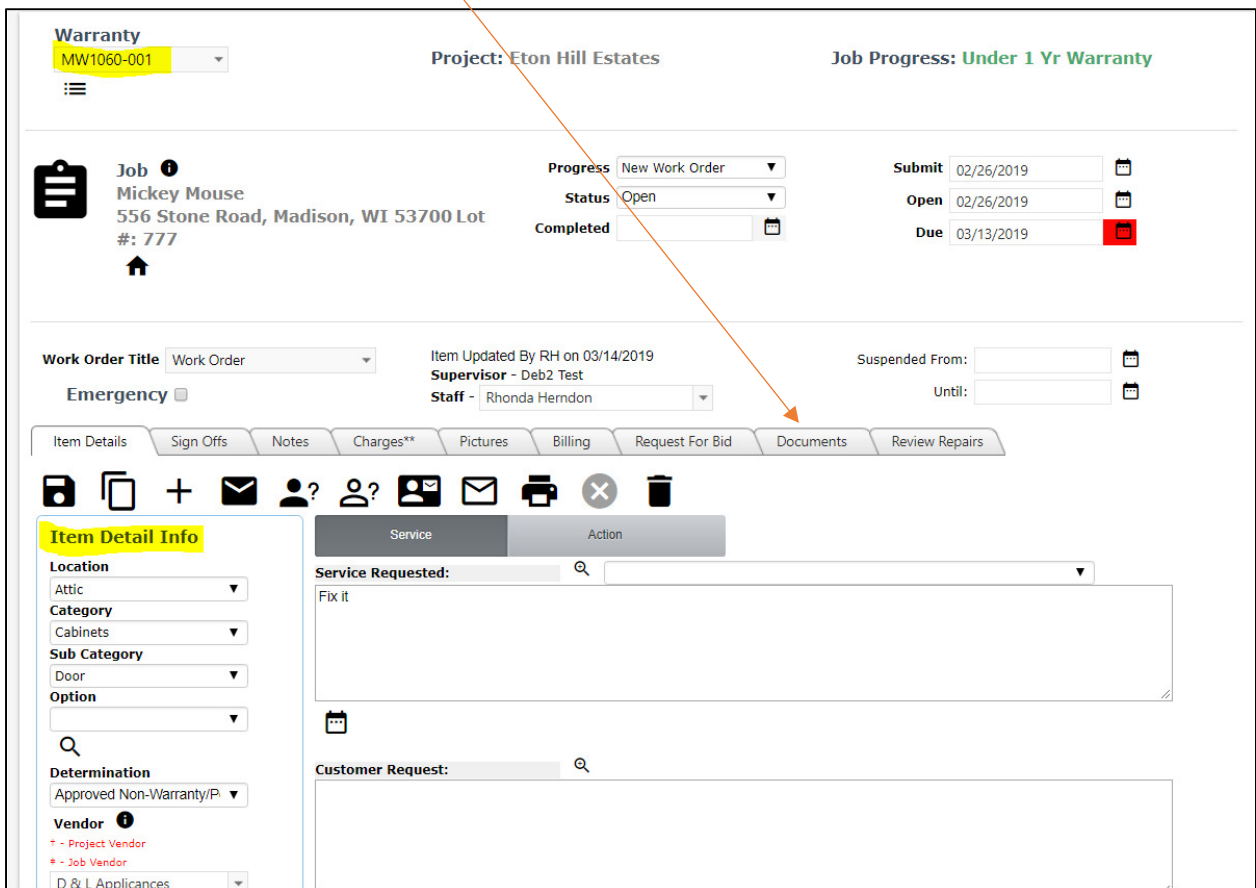
## HOW TO UPLOAD DOCUMENTS/PICTURES TO ITEMS

Attaching documents to an Item is a convenient and simple feature that allows you to send any pertinent documents to your vendor(s) with their work order(s).

You can attach a document to an Item from **Item Detail** screen. If you have already saved the item and moved on, you can quickly come back to it by selecting the specific item number in the global search field.



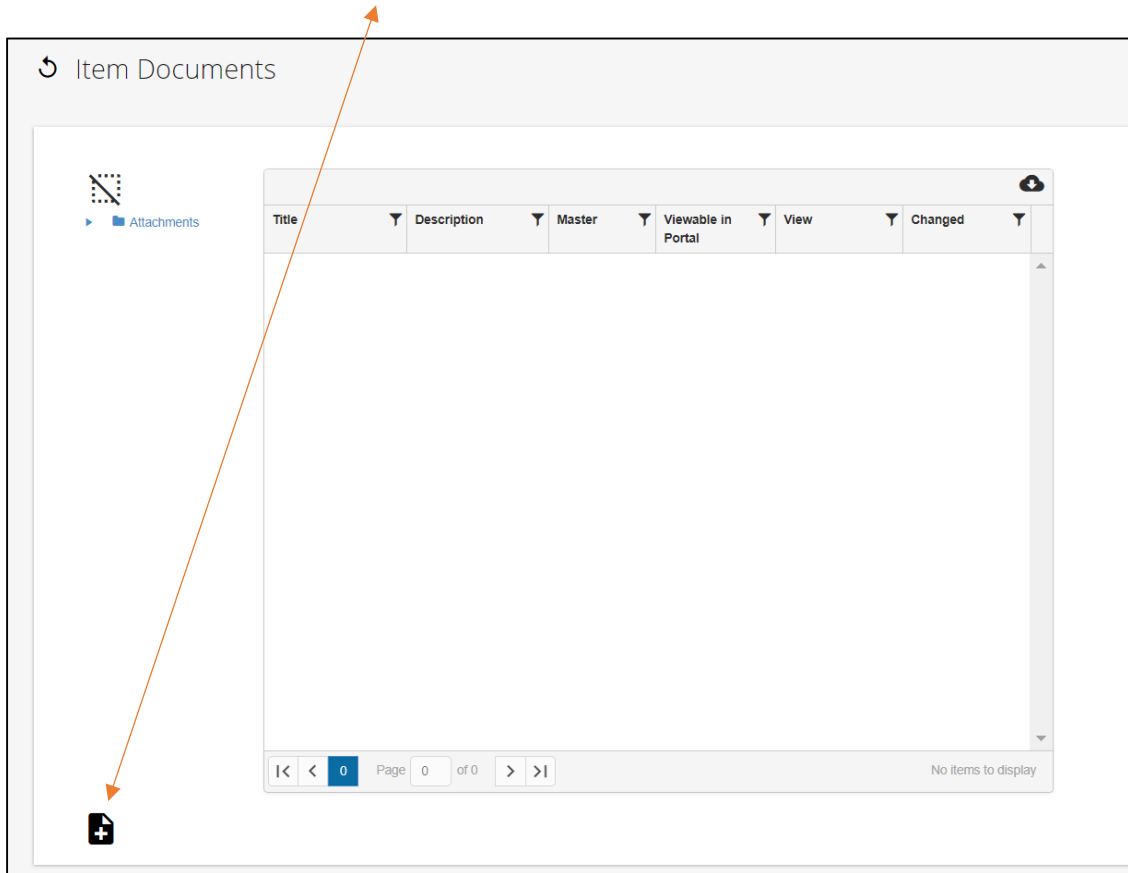
From the Item Detail screen, select the **Documents** tab



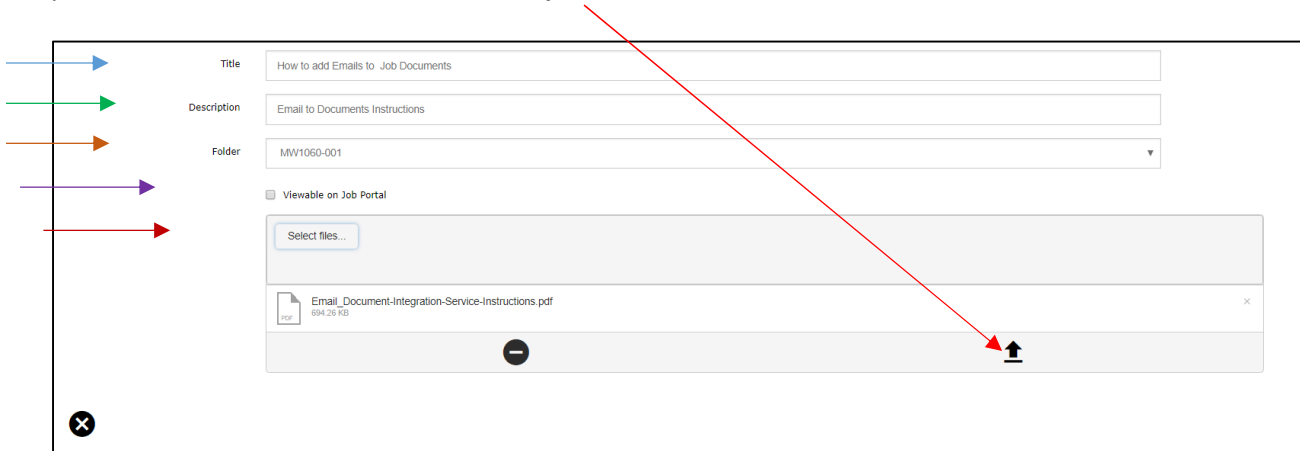
Which will take you to the **Item Documents** screen.

## HOW TO UPLOAD DOCUMENTS/PICTURES TO ITEMS

To add a new document, select the **New Document** icon

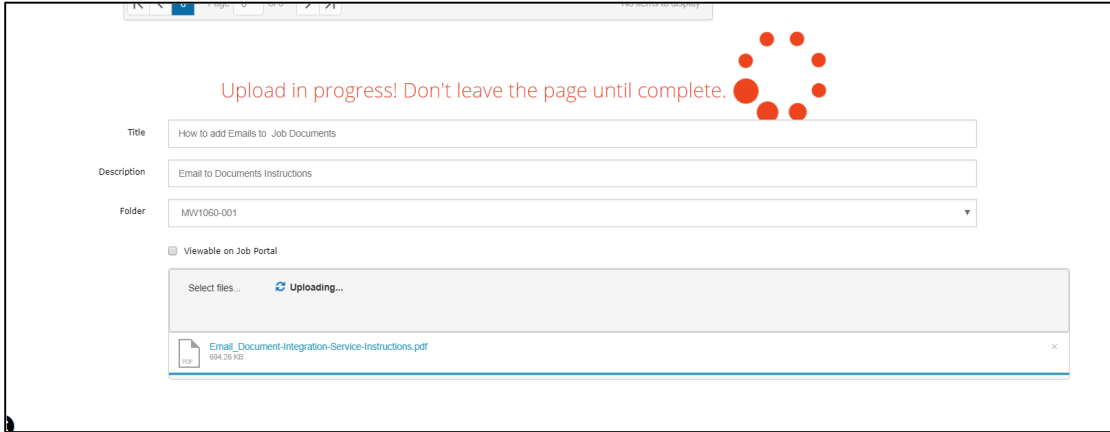


Enter a **Title** and **Description** for the attachment and select a **folder**. If appropriate, select **Viewable on Job Portal** (meaning that your homeowner will be able to see this document via the Job/Homeowner Portal). Click on **Select Files**, choose your desired attachment and select the **Upload** icon.

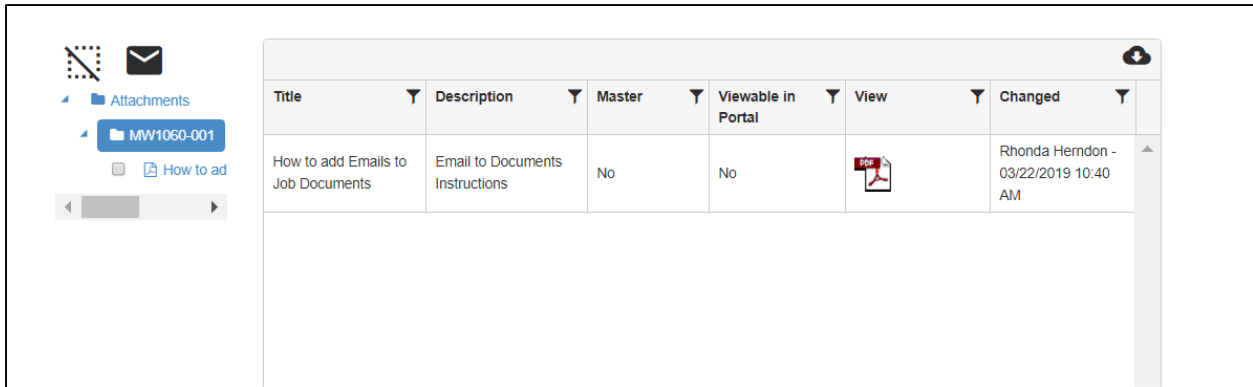


## HOW TO UPLOAD DOCUMENTS/PICTURES TO ITEMS

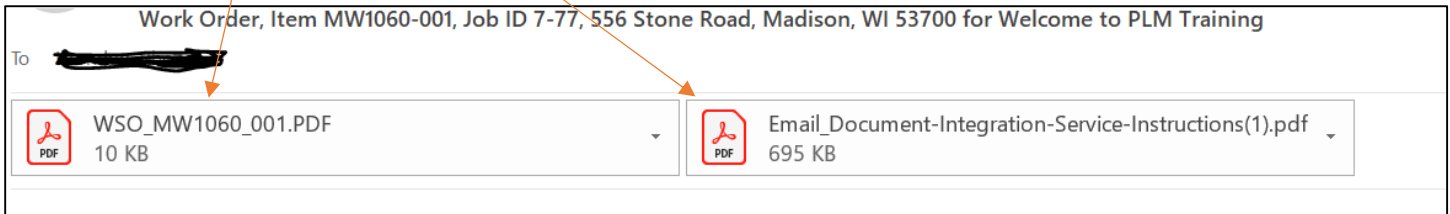
As the document uploads, you will see the following popup. If you leave the page before the upload completes, it will not be attached to your work order.



Once the upload has finished, you can view it in the Item Documents tab



The attachment will accompany the work order when sent to the vendor. It will appear as follows in the vendor's email with both the work order and the attachment included.



## HOW TO UPLOAD DOCUMENTS/PICTURES TO ITEMS

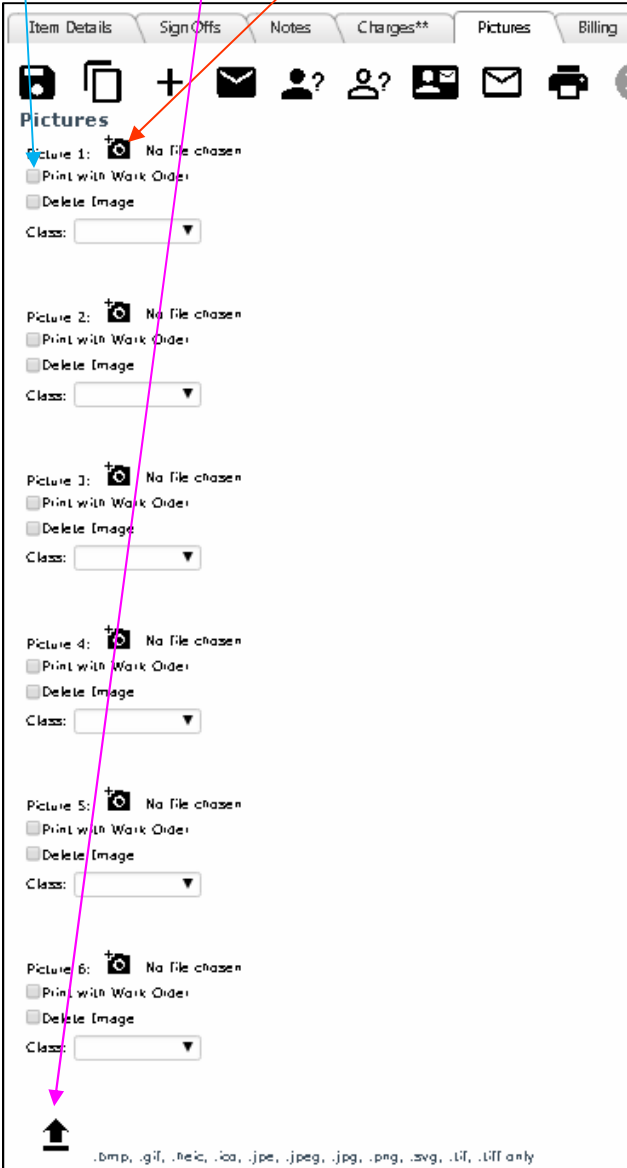
### How to Upload Pictures to an Item:

**Note:** Up to six (6) .JPG images (compressed images), can be uploaded to an Item.

Pictures can be added within the Item Detail screen or Quick Add screen (NOTE: only 3 pictures can be added here).

**Item Detail Screen** –Select the Pictures tab.

Select the Box that says 'Print with Work Order' click on **Choose File...** to select the picture you would like to upload. Continue this process until all the pictures you would like to assign to the work order (item) have been uploaded. Now select the 'Save, Upload Pictures & Close' button to attach the pictures. The Item will now include the image(s) on the second page of the printed, emailed, or faxed Item.



Item Details | Sign Offs | Notes | Charges\*\* | Pictures | Billing

**Pictures**

Picture 1:   Print with Work Order  Delete Image  
Class:

Picture 2:   Print with Work Order  Delete Image  
Class:

Picture 3:   Print with Work Order  Delete Image  
Class:

Picture 4:   Print with Work Order  Delete Image  
Class:

Picture 5:   Print with Work Order  Delete Image  
Class:

Picture 6:   Print with Work Order  Delete Image  
Class:

.bmp, .gif, .heic, .ico, .jpe, .jpeg, .jpg, .png, .svg, .tif, .tiff only