Attaching an image/document to a client file

- 1. From the client Policy Summary Screen, click on Images/Scan Document.
- 2. Double click on <Add New Image/File>.

💶 Policy Summary Screen	
Auto Policy for AAA Ziggy Zoom Zoom Images / Attached Files for Client File Description	Summary View/Edit Details Receive a payment Write a Check View Payment History Print Forms/Letters View/Add Notes Images/Scan Document Emails <u>Certificate Holders</u> Endorsements
Scan a Document (TIFF) Select Scan Source Open in default viewer Setup Scan Options Sow Setup Before Scan Other Policies Policy Balance Send to ITC TurboRater	Activate Policy Cancel Policy Delete Client Done
Other Policies Policy Balance Send to ITC TurboRater File Created: 10/29/2009. Last Modified: 12/4/2009	2016

3. In the Attach New Image/File box that will come up, type in the description for the image

Attach New Image/File	
Please Enter Description for the Image/File	OK Cancel
Test image	

- 4. Browse to the location of the file.
- 5. Highlight the file and click **Open**.

Choose a File to					? 🗙
Look in:	C Documents		•	두 🗈 💣 📰 -	
My Recent Documents Desktop My Documents	Attaching docu	ments.pdf			
My Computer					
S	File name:	Attaching documents.pdf		•	Open
My Network Places	Files of type:	Adobe Acrobat		•	Cancel

6. Your document name will then display in the **Description** box on the **Policy Summary Screen**.

Images / Attached Fil	es for Client File	Summary
Description		View/Edit Details
<pre><add file="" image="" new=""></add></pre>	Image	Receive a payment
Test image		Write a Check
A		View Payment History
NO PREVIEW AVAILABLE	Print Forms/Letters	
	View/Add Notes	
		Images/Scan Document
		Emails
		Certificate Holders
		Endorsements
Scan a Document (TIFF) Select Scan Source		Activate Policy
Select Scan Source Open in default viewer	Open Email Delete	Cancel Policy
Setup Scan Options	201013	Delete Client
Show Setup Before Scar		