

Attachments

Last Modified on 01/17/2023 9:58 am EST

AlarmBiller allows you to add attachments to proposals, work orders, and invoices. Here you can create a library of attachments for this purpose.

Adding a New Attachment

Add

To add a new attachment click “Add” in the top right corner of the page.

Attachments

Attachments			<input type="checkbox"/> Show Inactive Attachments	Add
Drag a column header and drop it here to group by that column				
Attachment Name	Type			
SDM AstraSecurity.pdf	contract			 

Complete Fields

Complete Attachment fields.

Attachment Name	Type	
<input type="text" value="Grossman Contract"/>	<input type="text" value="contract"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>

Attachment Name

Type a name for the attachment.

Type




Choose a document type from the dropdown box.

Save

Click the check mark on the right side of the screen to save.

Uploading

To link a document to the attachment name, click the upload button to the right of the attachment.

Attachment Name	Type	
Grossman Contract		  


Upload Files



Click "Upload Files" in the upper right corner of the page that appears and select the file(s) you would like to upload from your documents. You can also drag and drop a file(s) from your documents directly onto the page. Then click "Save" in the bottom right corner to update.

Documents for: Grossman Contract
×

Documents

*Max File Size 5MB

Show Deleted Documents
  Upload Files

File Name	Description	Type	Security	Modified	
add attachment.png		contract	Customer	8/11/2016	 

1 - 1 of 1 items
↻

* Click File Name to rename/replace a document.

✕ Cancel
💾 Save