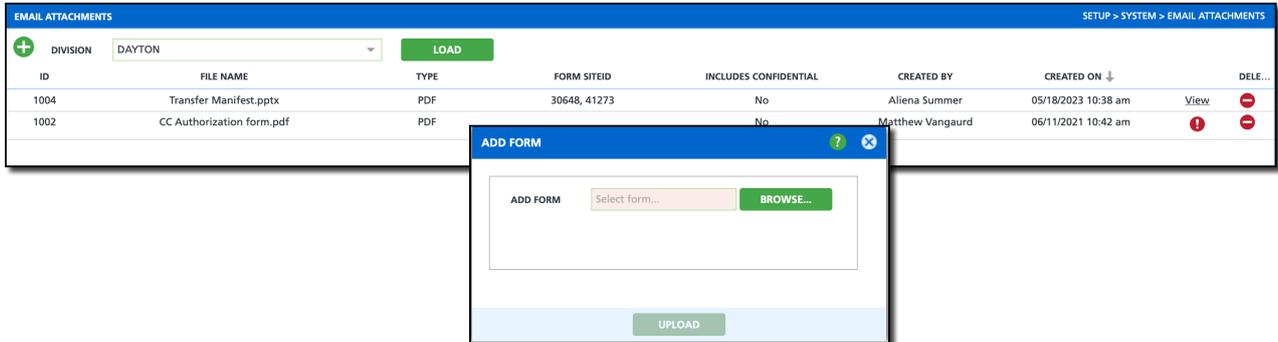


# Email Attachments

Last Modified on 05/30/2023 9:29 pm EDT

Pathway: [Setup](#) > [System](#) > [Email Attachments](#)

The Email Attachments tool is used for uploading and storing documents for future use as attachments in customer emails, proposals, and service contracts sent from the Navusoft system. Examples of email attachments include: Cancellation Policies and Credit Card Authorization forms.

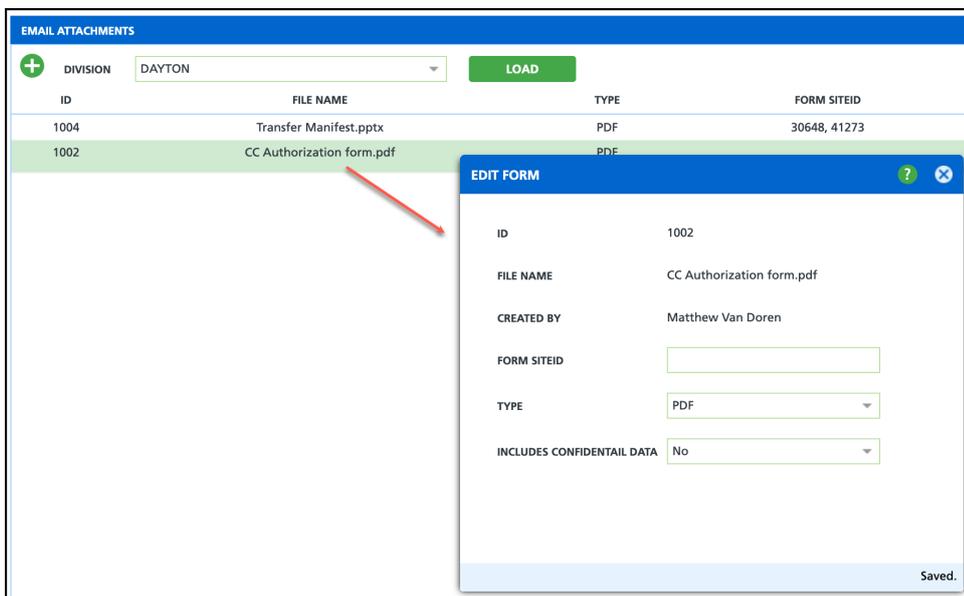


## Add an Email Attachment

1. Select the **Division** the attachment is intended for and click **Load**.
2. Click the **green +** icon to open *Add Form*.
3. Select **Browse** to search and upload the attachment. After the attachment has been uploaded the Add Form screen will close.
4. Apply additional setup to the attachment by double clicking on the uploaded **Form** to open *Edit Form*.

## Edit Email Attachment

Additional form setup is available by double-clicking on an attachment to open the Edit Form popup editor.



Field	Description
<b>Form Site ID</b>	Option to restrict the form's use to only the site of the entered Site ID. This field is required if 'Form Site (External Form)' is selected from the Type drop down.
<b>Type</b>	Indicates the file type of the attachment. By default, all uploads are assigned PDF. If the attachment is specific to a site, select 'Form Site (External Form)' and enter a Form Site ID.
<b>Includes Confidential Data</b>	Indicates if the attachment includes confidential data.

## Add an Attachment to an Email

After an attachment has been uploaded and saved, it will display in the Forms drop down of the Send Email screen. Attachments can be sent with customer emails, proposals and service contracts.

The screenshot displays a software interface with a 'SEND EMAIL' modal window open. The background shows two site profiles for 'Trash ROOFING'. The left profile is at 1111 Navusoft Ct, STE 1150, Corpus Christi, TX 78401-0512, with contact number +1 555-555-1234. The right profile is at Washington Drive BLDG 332 & CORPUS CHRISTI, TX 78401, with contact number (555) 555-1234. The 'SEND EMAIL' window has the following fields:

- SUBJECT:** Acct Notify \ New Contact
- SEND TO (EMAIL):** (Empty field)
- EMAIL TO CONTACT:** (Empty dropdown)
- FORMS:** CC Authorization form.pdf (Selected and highlighted with a red box)

The email body text is as follows:

Good morning @@account.name;;

If we haven't met yet, I will be your Account Manager with QA Waste going forward. My primary goal is to ensure your continued satisfaction and to earn your trust. My cell phone number is below.

Please do not hesitate to call, text or email me any time.

Thank you,  
 John Doe  
 Commercial Account Manager  
 C: 555.555.6554  
 O: 555.555.0360  
 12345 Navy Blvd  
 Clearwater, FL 33762

A 'SEND' button is located at the bottom of the modal window.