# HOW TO: ATTACHMENTS / DOCUMENTS

This guide outlines the steps for uploading and downloading or viewing documents and attachments online on **LauderBuild**. **Attachments** are electronic files such as PDFs, image files or video clips that users can upload and associate with a record. Any attachment may also be referred to as a "**Document**", although they can be any document or file, such as special instructions, diagrams, pictures or other information relevant to the record. Most records in the LauderBuild system will need attachments to be part of the record. Attachments can be added to a record at any time on the **Attachments** page. You can upload, view and print record attachments here.

> *NOTE: You must be logged in a as registered LauderBuild user in order to view and upload attachments. Business Tax users must be the Record Creator, Contact or Owner to view and download attachments.*

Viewing / Downloading Attachments

Users can view, download and print attachments at any time. You can also view document information such as the file name, file size, upload date and type. Open the record and select **Record Info > Attachments**.

Attachments Menu
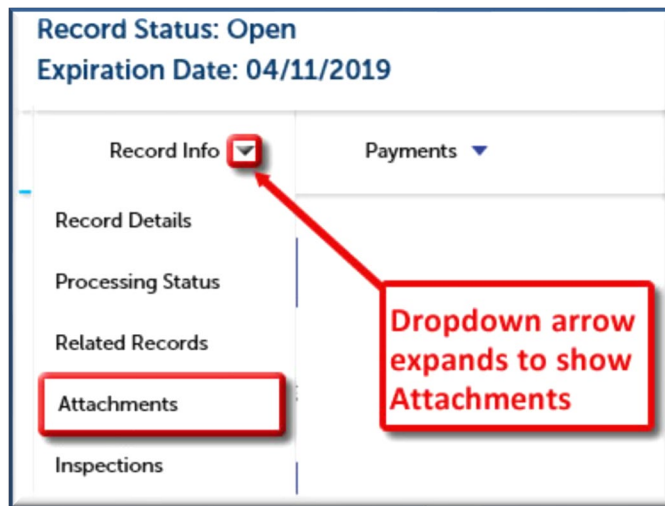
Download and View Attachments

Click on the attachment **Name**. The view and download options depend on what browser you're using.

In Internet Explorer, the Save dialog will open at the bottom of the screen. Click **Open** and the file will open in the default program for that file type or you can save a copy.

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Download Attachments – Internet Explorer

In Chrome, the file must be saved first. It may ask you for a save location or it may automatically save to your Downloads folder and then you will have options at the bottom of the screen. Click **Open** and the file will open in the default program for that file type. **Show in folder** will open the folder that the file was downloaded to.

Download Attachments – Chrome

View Attachment Details

Click **Actions > View Details** to view **Document Details**

Attachment Document Details

Uploading Attachments

These steps will show you how to upload documents to a record. Please note the following when working with attachments:

➢ The maximum file size allowed is 250 MB.

➢ The following file types are NOT allowed: bat; .dll; .config; .cs; .exe; .htm; .html; .js; .jsp; .mht; .mhtml; .msi; .txt

➢ File names should be less than 50 characters and should NOT contain any special characters other than an underscore or a dash.

1. Open the record and select **Record Info > Attachments**.

2. Click **Add**.

3. Click **Add** again to select the document(s).

4. Browse to your document (if you want to select multiple documents, hold the Ctrl key down and click on each document or image you wish to attach). Click **Open**.

5. You will see your selected files in the Upload window. Wait until all the attachments have reached 100% before clicking Continue or they will not attach. You can click **Add** again to add more items or if finished click **Continue**.

6. Next you'll need to define your attachments. For each item, you'll need to select the document **Type** and add a **Description**. This should match what the document is (e.g., a signed contract).
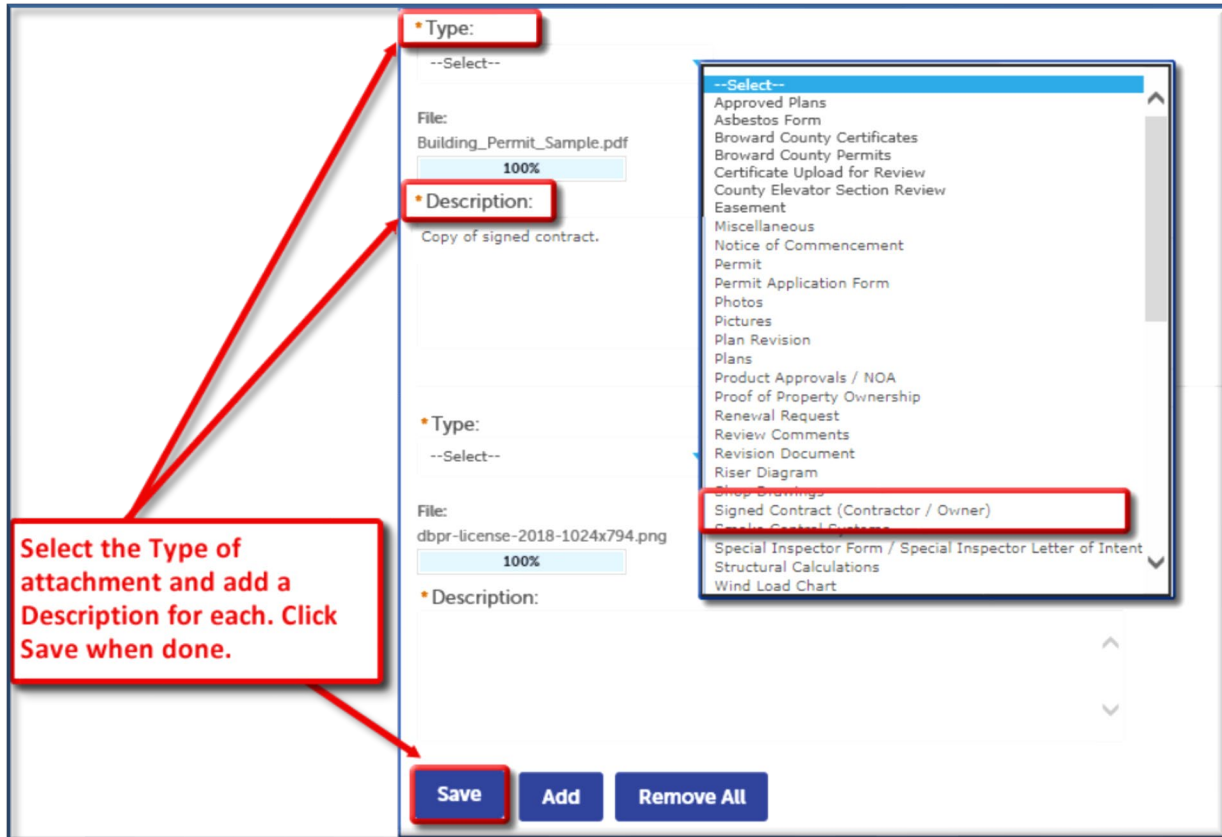
7. Click **Save**.

> *NOTE: You can only remove documents <u>BEFORE</u> saving. Once you click Save you will not be able to remove or delete the attachment. Please contact the Accelaration Technical Support Team to request an attachment be deleted. Please be aware that documents that have already been reviewed as part of the application process might not be able to be deleted.*

You will get a confirmation when your attachments have been saved successfully.

Attachment Upload Confirmation