

Attachment Types Table





The Attachment Types table is a background table that holds a record for each value to be displayed in the Attachment Type field within the Attachment record. It also defines any special fields to be displayed for this attachment type within the Attachment record.

Use Case

Attachment Types can be created and edited by admins and Contract Managers. Each attachment type might be either or both of the following:

- An option for Type of Document in a company document.
- An option for Attachment Type in an attachment record.

The Show in Tables field in the attachment type record controls whether the attachment type is used in attachments and company documents.

Attachment Type			
Save Cancel		Attachment Type History « »  	
ID	10	Status	Active ▼
*Attachment Type	W-9		
Show in Tables	Company Documents 	Used by System	<input type="radio"/> Yes <input checked="" type="radio"/> No
Sort Order	1	Fields to Show	W9 
Include in Approval Packet	No ▼	Include in DocuSign Envelope	No ▼
Notes			

The Attachment Type and Fields to Show fields are pulled into the Attachments and Company Documents tables as a link to selected fields from another table. The values in Fields to Show are used to control visibility of certain fields in the Attachment and Company Document records.

The Sort Order field is used to determine the order of the drop-down list displayed in the Attachment Type field within Attachment records.

Attachment Types

Status: 8 record(s) found, 1 pages. Click [here](#) to re-count records.

New | Mass Edit | Delete | Actions ▾

Views ▾ | Search ▾ |  ▾ |  ▾

<input type="checkbox"/> Edit	ID ↓	Attachment Type	Fields to Show	Sort Order
<input type="checkbox"/>	 8	Document Ready for Approval		1
<input type="checkbox"/>	 7	Supporting Document		9
<input type="checkbox"/>	 6	Performance Bond	Expiration Date, Coverage Amount	7
<input type="checkbox"/>	 5	Insurance Certificate	Expiration Date, Type of Certificate, Coverage Amount	6
<input type="checkbox"/>	 4	Document Provided by Approver		3
<input type="checkbox"/>	 3	Document Provided by Outside Party		1
<input type="checkbox"/>	 2	Fully Executed Agreement		4
<input type="checkbox"/>	 1	Generated Agreement from Template		5

Ownership

Attachment Type records are owned by their creator. Specifically, an attachment type record is owned by the user whose Login matches the Creator Login field.