

Attachment Types Table

The Attachment Types table is a [background table](#) that holds records that populate the values displayed in the Attachment Type field drop-down list within an Attachment record. It also defines any special fields that should be displayed for this attachment type within the Attachment record.

Use Case

Attachment Types are created and edited by users in the Admin groups and Contract Managers. Each Attachment Type record can be one of the following, or both:

- 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 record can be used in the Attachment and Company Document tables.

Attachment Type			
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 Attachment and Company Document tables as a link to selected fields from another table. The values in Fields to Show are used to control the 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

Automation

The Standard System Demo system does not contain any rules, or actions, in the Attachment Types table by default.

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.