

# Fast-Class File

Client Data System

## Volume 131: Uploading a Document

### To Attach a File to a Contact Record:

- Open a contact record.
- Select the **Letters/Documents** tab.
- Click the **Attach File** button.
- In the **Document/Image Description** window, click **File Name**.
- Browse for the file you would like to attach to the contact record.
- Right-click on the file and choose **Select**.
- Select **Embedded** or **Link**.

*Note: Selecting **Embedded** makes a copy of the file and inserts it into CDS. Keep in mind that this option will increase the size of your database. Selecting **Link** creates a direct link to any file stored on your System, Network Environment, or on the Internet. When creating a link to a file, the file should remain in its original location.*

- Click OK.



Figure 1: The Document/Image Description window

### To Attach a File to a Policy Record:

- Open a policy record.
- Click **Proposals** from the **Basic Information** tab.
- In the **Document Log**, click the **Attach File** button.
- In the **Document/Image Description** window, click **File Name**.
- Browse for the file you would like to attach to the policy record.
- Right-click on the file and choose **Select**.
- Select **Embedded** or **Link**.
- Click OK.