

# Upload Documents to an Existing Record

1. Open the record that the documents will be added to
2. Click on “Attachments”

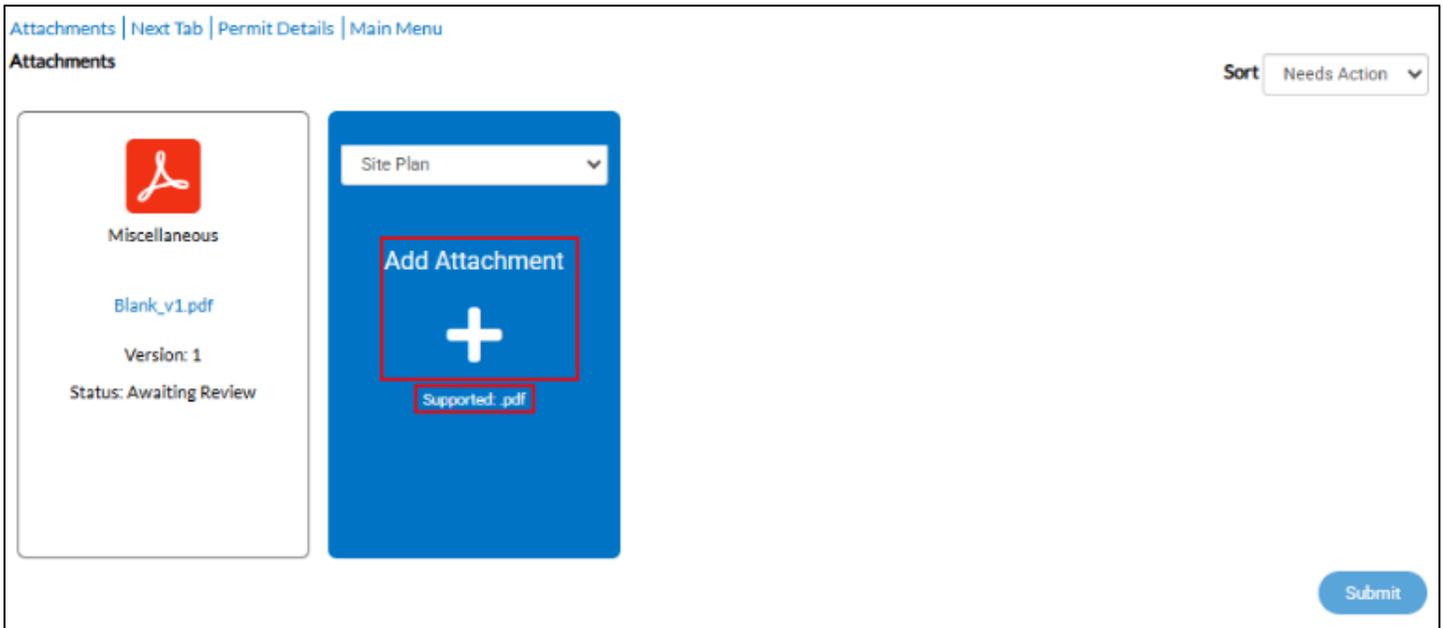
The screenshot displays a web application interface for managing permits. At the top, a navigation bar includes links for Home, APPLY, Apply via Map, TRENDING, Dashboard, My Work, Today's Inspections, Fee Estimator, Pay Invoices, Search, and Calendar. The main content area shows the permit number BRES2025-00303 and an 'Add to Cart' button. Below this, there are tabs for Permit Details, Tab Elements, and Main Menu. A detailed view of the permit is shown, including fields for Type (Residential Building Permit (2025)), Status (Void), Project Name, Applied Date (09/16/2025), Issue Date, District, Assigned To, Expire Date, Finalized Date, and Description (Test permit). A horizontal menu below the details includes buttons for Summary, Locations, Fees, Inspections, Attachments (highlighted with a red box), Contacts, Sub-Records, and More Info. The Attachments section is active, showing a list of existing attachments: a PDF icon labeled 'Miscellaneous', the file 'Blank\_v1.pdf', 'Version: 1', and 'Status: Awaiting Review'. To the right of the list is a 'Sort' dropdown menu set to 'Needs Action'. A large blue 'Add Attachment' button with a plus sign is prominently displayed, with a list of supported file formats below it: .pdf, .jpg, .png, .jpeg, .gif, .tiff, .doc, .docx, .xls, .xlsx, .text, .dwg, .zip, .csv, .rtf, .dxf, ... A 'Submit' button is located at the bottom right of the interface.

3. Specify the type of document that is to be uploaded by clicking “Select Type” within the blue box, and then selecting the document type from the drop-down menu

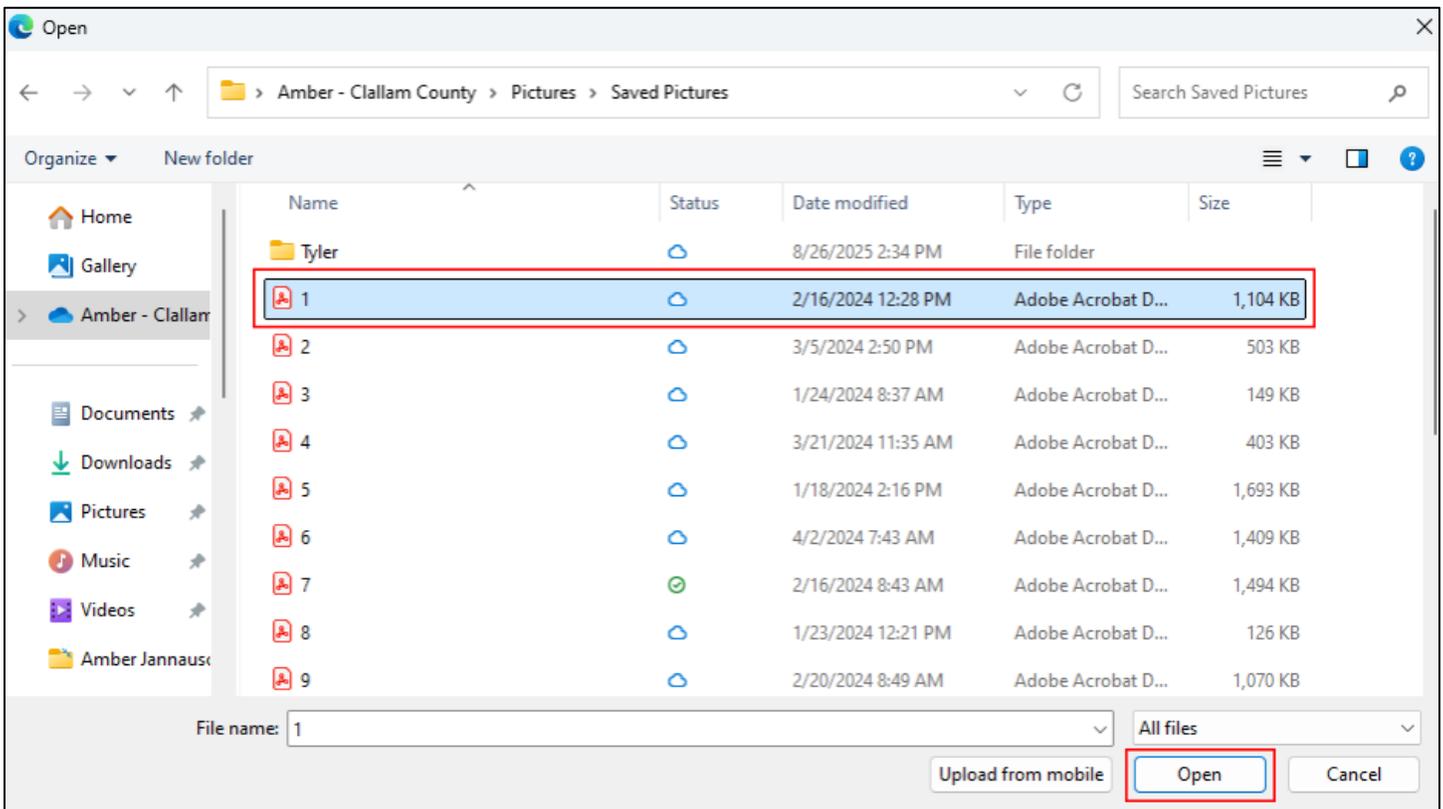
The screenshot displays a web application interface for permit management. At the top, a navigation bar includes links for Home, APPLY, Apply via Mobile, Fee Estimator, Pay Invoices, Search, and Calendar. The main content area is titled "Permit Number: BRES2025-0030" and includes tabs for Permit Details, Tab Elements, and Main Menu. A sidebar on the left shows permit details: Type (Residential Permit (2)), Applied Date (09/16/2025), District, Finalized Date, and Description (Test permit). A central dropdown menu, titled "Select Type", lists various document categories such as ADU Worksheet, Construction Plans, Equipment Cutsheets, FEMA Flood Elevation Certificates, Fire Sprinkler Plan, Floor Plans, Itemized Bid, Miscellaneous, Proof of EPA Certification, Proof of Ownership, Site Plan, Special Inspection, Structural Calculations, Truss Calculations, Truss Layout, and Water Mitigation Certificate (Recorded). Below the dropdown is a blue "Add Attachment" button with a plus sign and a list of supported file formats: .pdf, .jpg, .png, .jpeg, .gif, .tiff, .doc, .docx, .xls, .xlsx, .text, .dwg, .zip, .csv, .rtf, .dxf, etc. To the left of the button, an existing attachment is shown: a PDF file named "Blank\_v1.pdf" (Version: 1) with a status of "Awaiting Review". The interface also features a "Sort" dropdown set to "Needs Action" and a "Submit" button at the bottom right.

4. Click “Add Attachment”

**\*\*\*Note: Make sure the type of file (ex: PDF, JPEG, JPG, etc.) that will be uploaded matches the “Supported” file types**



5. Locate the desired file and click “Open”



- Repeat steps 3 – 5 to add additional documents
- Once all documents have been added, click “Submit”

Summary Locations Fees Inspections **Attachments** Contacts Sub-Records More Info

Attachments | Next Tab | Permit Details | Main Menu

**Attachments** Sort Needs Action

Miscellaneous  
Blank\_v1.pdf  
Version: 1  
Status: Awaiting Review

Site Plan  
1.pdf  
Size: 1.08 MB  
[Remove](#)

Select Type

**Add Attachment**

+

Supported: .pdf, .jpg, .png, .jpeg, .gif, .tiff, .doc, .docx, .xls, .xlsx, .text, .dwg, .zip, .csv, .rtf, .dxf,...

[Submit](#)

- Click “Ok” on the “Submit Confirmation”. The files will then be uploaded.

**Submit Confirmation**

Are you sure you're ready to submit these files for review? Doing so will disable the ability to upload files for this session.

[Cancel](#) [Ok](#)

**Saving File**

1 of 1 Uploaded [Show Details](#)

100%

9. Once the upload is complete, a success message will be displayed

Home APPLY Apply via Map TRENDING Dashboard My Work Today's Inspections Fee Estimator Pay Invoices Search Calendar

**Permit Number: BRES2025-00303** Add to Cart

Permit Details | Tab Elements | Main Menu

<b>Type:</b> Residential Building Permit (2025)	<b>Status:</b> Void	<b>Project Name:</b>
<b>Applied Date:</b> 09/16/2025	<b>Issue Date:</b>	
<b>District:</b>	<b>Assigned To:</b>	<b>Expire Date:</b>
<b>Finalized Date:</b>		
<b>Description:</b> Test permit.		

Summary Locations Fees Inspections **Attachments** Contacts Sub-Records More Info

Attachments | Next Tab | Permit Details | Main Menu

**Attachments** Sort Needs Action

✓ The file upload was submitted successfully. ✕

 <b>Site Plan</b> 1_v1.pdf Version: 1 Status: Awaiting Review	 <b>Miscellaneous</b> Blank_v1.pdf Version: 1 Status: Awaiting Review	<div style="background-color: #0070c0; color: white; padding: 10px; border-radius: 5px;"><p>Select Type </p><p style="text-align: center; font-weight: bold; font-size: 1.2em;">Add Attachment</p><p style="text-align: center; font-size: 2em; font-weight: bold; color: white;">+</p><p style="font-size: 0.8em; color: white;">Supported: pdf, jpg, png, jpeg, gif, tiff, doc, docx, xls, xlsx, text, dwg, zip, csv, rtf, dxf...</p></div>
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Submit