

Company Files (Upload – Update - Edit)


This article describes how to Upload, Update Files (Documents) or Edit Company File options. Files can be shared to view, download or attached to a system Email.

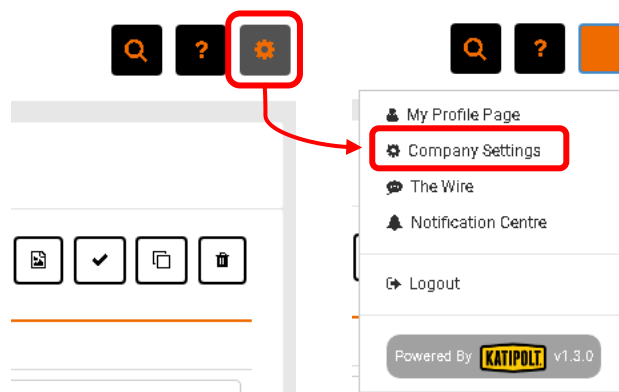
To Upload Files;


Uploading Files can be done at Company Settings, Contacts, Works, Quotes and Sales.

Quick Flow;


Company Settings > [Edit] > COMPANY FILES Subnav > [Add File] > [Choose File] > Description > Option(s) > [Save]

1. Press on the **[Settings]** button  to display the Options Menu, then Press on the **Company Settings** option to display the Company Settings Window




2. From the Company Settings Window, Press on the **[Edit]** button  to display the Company Settings Edit Window

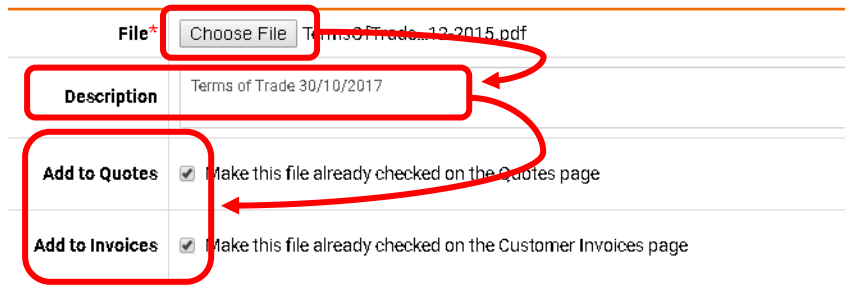



3. From the Company Settings Edit Window, Scroll down and Press the **COMPANY FILES** Subnav to expand, then Press the **[Add File]** button  to display a new FILE: NEW FILE Window



See next page...

- From the FILE: NEW FILE Window, Press the **[Choose File]** button  and navigate to the file, double clicking/pressing the file to upload, then give the file a **Description** and select default **Option(s)** for the file to attach to





- When you have finished uploading, Press the Company Settings Edit Window's **[Save]** button  to save entries



To Update Files or Edit File Options

- From the Company Settings Editing Window scroll down and Press on the **COMPANY FILES** Subnav to expand, then Press on the **[Edit]** link to display the FILE: XXXX Window

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- From the FILE: XXXX Window you can **[Upload New Version]**  of the file to Update, OR Edit the default **Option(s)** for the file to attach to, OR **[Delete]**  the file.

NOTE: To view the File, from the COMPANY FILES Subnav, press on the File Name, OR from the FILE: XXXX Window, Press on the Download File. The file will display in the bottom bar of the Browser Window

- When finished Updating and/or Editing, Press the FILE: XXXX Window's **[Save]** button  to save entries, then Press the Company Settings Edit Window's **[Save]** button  to save entries