

Company - Documents & Pictures

Documents & Pics is a central area where all the documents and pictures associated with a Company can be accessed by all employees. They will have the ability to add, view and search depending on permissions. To add Documents and/or Pictures search the Company using your preferred search method. Within the Company record single click on the **Documents & Pics** tab.



Jacksonville Property Mgmt - 904-000-0000
Jacksonville Property Mgmt
 2369 1st Street, Suite 300, , Jacksonville Beach, FL 32250

Detail |
 Contacts (5) |
 Work Order Setup |
 Subs/Techs |
 Tasks (1) |
 Correspondence (4) |
 Documents & Pics (1) |
 Locations (2) |
 Referrals

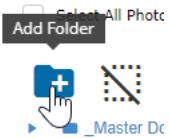
Note: The number in parentheses is the total number of Documents and Pictures that are associated with the Company.

Folders are a great way to keep your documents and pictures organized.

To Add a New Folder



1. Click the **folder icon**; the **Add Folder pop-up** will display.
2. Type the description of the **Folder Name**.
3. Click the **Save changes**.

Documents



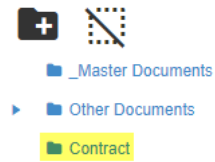
Add Folder

Folder Name

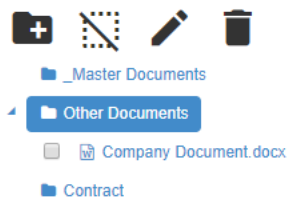
Save changes


Documents



When a **triangle** displays to the left of the folder name single click the **triangle** to expand and display the details stored within the folder.

Documents



Title	Description	Master	Viewable in Portal	View	Changed	Location
Company Document.docx		No	No		Dawn Bryant - 10/27/2019 11:42 AM	

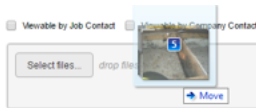
Company - Documents & Pictures

How to upload a document and/or picture to the Company.

1. Click the **New Document** icon, located to the bottom left of page.



2. Apply the **Title** (if applicable); if a Title isn't added into this field then the Title of the Document and/or Picture(s) selected will be applied.
3. Apply the **Description** (if applicable).
4. Select a **folder** from the drop-down you would like the documents and/or pictures to be stored in (if applicable).
5. Check **Show In Company Portal** if you would like the uploaded documents and/or pictures to viewable in the Company Portal.
6. **Assign To Job**, is not applicable as this option has no function.
7. Select a **Location** from the drop-down select the Location the Document and/or Picture is applicable to.
8. Click **Select files...** to browse where the document and/or pictures are stored.
9. Select the documents and/or pictures you would like to upload or drag and drop the files into the light-grey select files box.



Note: There is no limit as to how many Documents and/or Pictures can be stored against the Company, but one individual Document cannot be larger than 10mb.

10. Click the **Upload icon** to proceed.

Title


Description

Folder

Show in Company Portal Assign To Job

Location

Select files...


Contract.docx
29.00 KB
×

⊖
⬆
Upload

Company - Documents & Pictures

Upload in progress

Upload in progress! Don't leave the page until complete.

Title:







Description:

Folder:

Viewable by Job Contact Viewable by Company Contact

Show In Intuitive Inspections

Select files... drop files here to upload Uploading...

 Water Damage.JPG 35.98 KB	100%	×
 Damage.JPG 86.57 KB	100%	×
 EQP 2.JPG 64.63 KB	100%	×
 Equipment Setup 2.JPG 68.88 KB	100%	×
 Equipment Setup.JPG 28.76 KB	100%	×
 Water 2.JPG 52.98 KB	100%	×

Upload in progress! Don't leave the page until complete.

Note: The green line with a 100% equals the upload is complete for that document and/or picture. The blue line with a 100% equals the upload is still processing.

Also if a document exceeds the 10MB size constraint a notification will be displayed.





The following message notifies the user of the file upload progress and status.

When the upload is complete a Files uploaded! message will display to the bottom left of the page.




Upload Complete

Documents

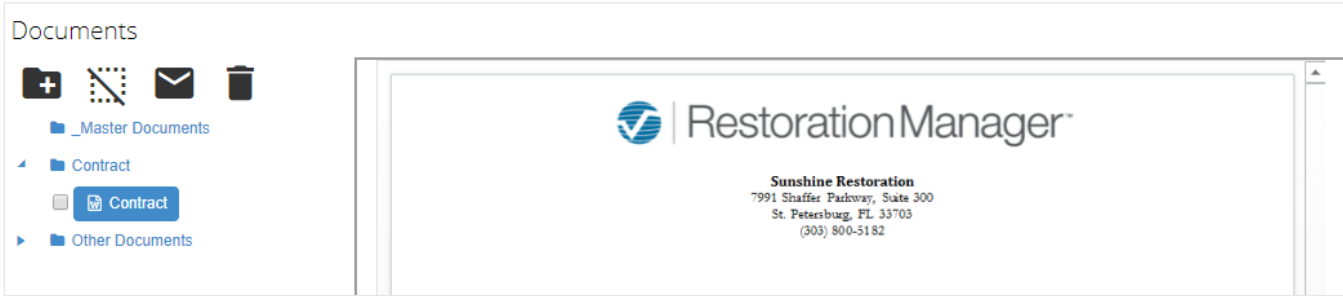





- _Master Documents
- Contract
 - Contract
- Other Documents

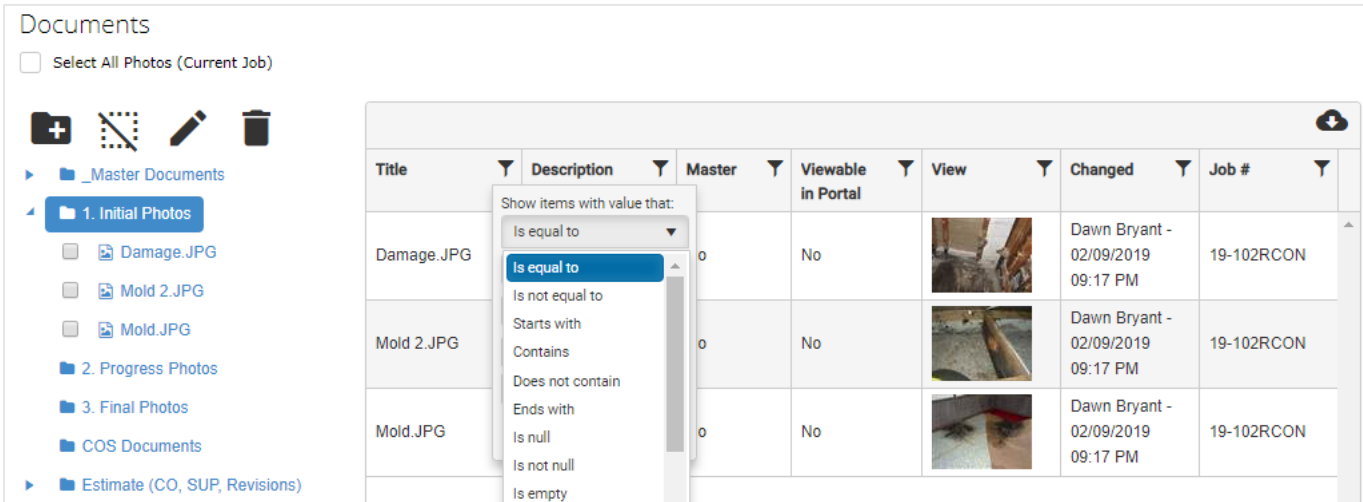
Title	Description	Master	Viewable in Portal	View	Changed	Location
Contract	Signed on 10/27/2019	No	No		Dawn Bryant - 10/27/2019 12:10 PM	Turtle Shores

Company - Documents & Pictures

Single click on the file to display the information in a preview window.



The search features provide the ability to narrow down the Documents and Pictures associated with a Company. Click on the funnel in any one of the headers and this provides you several search options. You can also click on any one of the the column headers to sort.



Other folder options; when a folder is highlighted you can deselect the folder by clicking the **Deselect** icon. You can edit a folder name by clicking **Edit** icon. You can delete a folder or document by clicking **Delete** icon.

