

How to Add Documents

Documents can be added directly from the module transaction (i.e Contracts) or from the Document Manager Add Documents menu and Document Search screen.

Pre-requisites:

1. Create the Folders where the documents will be stored. [How to Create and Duplicate Folders in Document Source](#)
2. Optional - Add Document Types to the Folders

How to Add Documents in Document Manager

1. On the user's menu panel, click Document Management menu
2. Open Add Documents screen
3. Click the Select Files button to start uploading documents
4. Select the document and proceed with uploading
5. Select the document, Record No. and Folder

The screenshot shows the 'Add Documents' window. It has a 'Select Source' section with 'Source' set to 'Contract' and 'Record No.' set to '3716'. Below this is a 'Select Folder' section with a tree view showing folders like 'Contract print', 'Price fixation print', 'Logistics', 'Claims', 'Printed', 'Accounts payable', 'Accounts receivables', and 'Risk Management'. The 'Contract print' folder is selected. On the right, there are 'Properties' and 'Preview' tabs. The 'Properties' tab shows 'Name' as 'SampleTIFF' and 'Cert ID' as '1'. The main area on the left shows a list of files with columns 'Name', 'Date', and 'User'. The file 'SampleTIFF.tif' is selected. A 'Drag and Drop here' area is at the bottom left.

6. If the folder is associated with Document Type, required fields should also be filled.
7. Click the Save button once done. The document will be attached to the selected transaction under the DMS tab.

The screenshot shows the 'Contract - 3716' window. It has a menu bar with 'New', 'Save', 'Search', 'Undo', 'Duplicate', 'Print', 'Email', 'Process', 'Pricing', 'Submit for Approval', 'Status', and 'Close'. Below the menu bar are tabs: 'Details', 'Additional Info', 'Documentation', 'DMS', 'Audit Log', 'Approval', 'Amendment (0)', 'Activities', 'History', and 'Scheduled'. The 'DMS' tab is active. It shows a table with columns 'Name', 'Folder', 'Date', 'Size', 'Type', and 'Document Type'. The table contains one row: 'SampleTIFF.tif', 'Contract \Contract print', '11/7/2018, 6:02:41 PM', '397.41 Kb', 'image/tiff', and 'Organic Certificate'.

8. To preview how the file looks, open the Preview tab