How to Add Documents

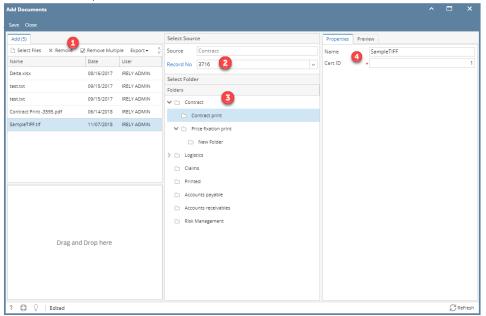
Documents can be added directly from the module transaction (i.e Contracts) or from the Document Manager Add Documents menu and Document Search screen.

Pre-requisites:

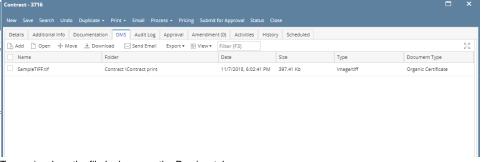
- 1. Create the Folders where the documents will be stored. How to Create and Duplicate Folders in Document Source
- 2. Optional Add Document Types to the Folders

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



- 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.



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