

5.6 Documents

vtenext features a simple but invaluable documents manager.

Documents manager main characteristics:

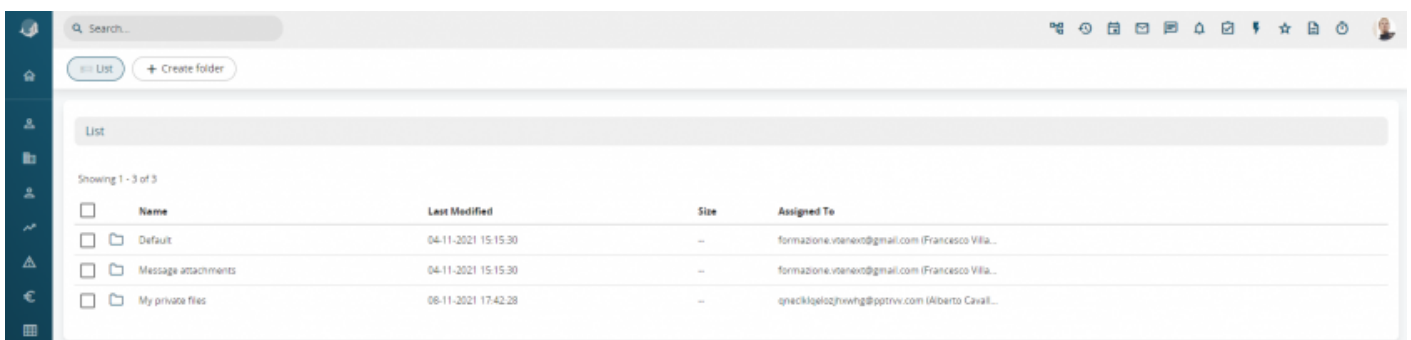
- Store file type documents (uploaded locally) or links (url from the web);
- Create folders to store documents digitally;
- Assign documents to the user responsible for managing them: e.g., if the module is set as private, each individual users can view only the documents assigned to their name;
- Share documents without sending them by email, by means of the download link;
- Share and provide read/write access to third parties without a vtenext account for revision purposes by means of a special authorisation token;
- Monitor the number of document downloads.

The documents display is arranged in folders or in list mode (List button). Folders can be created (Add Folder) and removed (Delete folders selected with flags).

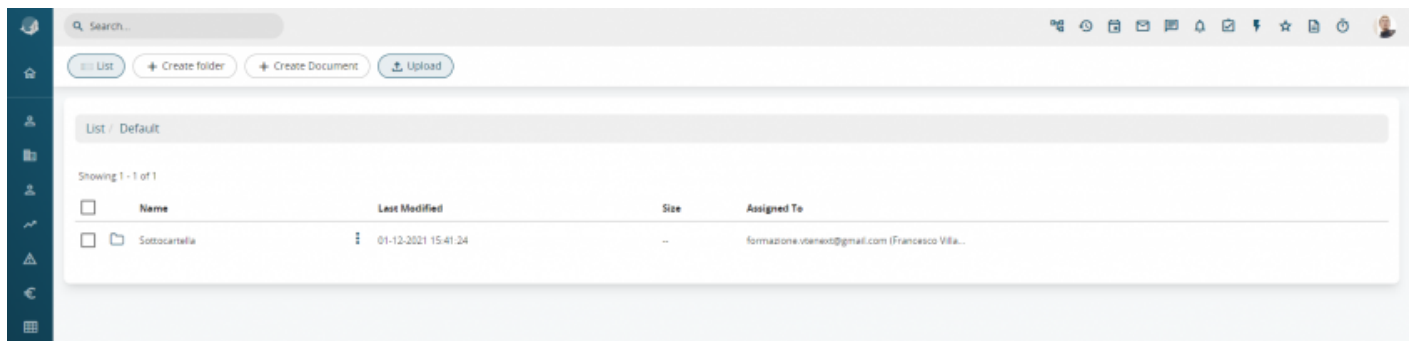
By default, vtenext have two folders loaded:

1. **DEFAULT:** example folder that allows you to upload your first files
2. **MESSAGE ATTACHMENTS:** which automatically collects all the attachments of the emails connected to the various entities or modules of the crm. For example, if an email is linked from the Messages module to a Contact, the attachment present will turn into a document that we will find directly linked to that same Contact and within this folder.
3. **MY PRIVATE FILES:** collects all files that were previously located in the folder MY FILES present in the homepage.

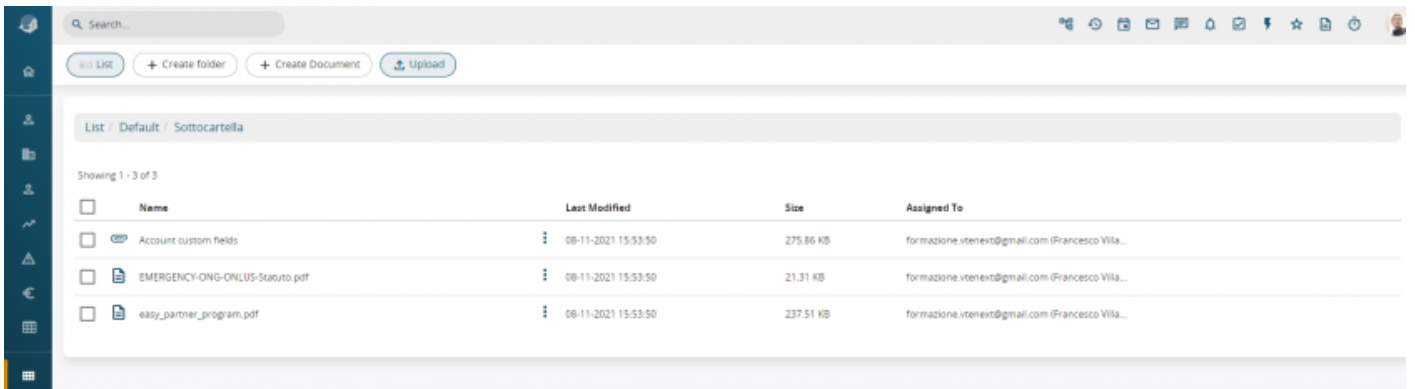
N.B.: folders containing documents cannot be deleted. First remove all the contents and then you will be able to delete the folder.



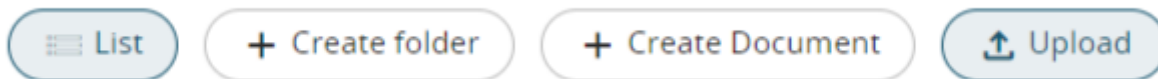
Folder list present by default in the module Documents.



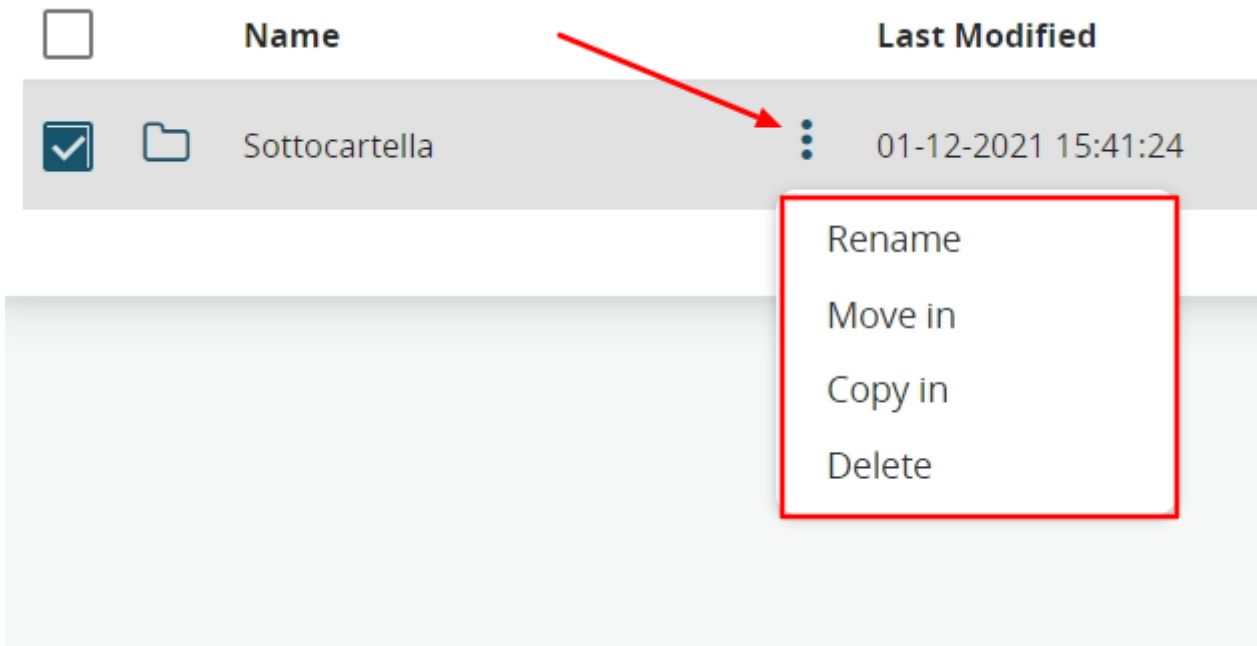
Clicking on the folder (in the example it was chosen the default folder), we can note that within this folder there is a sub- folder.



Finally, within the sub-folder there can be other files and sub-folders that can create a infinite structure. Note the path present in the head of the module.



For each folder or sub-folder, it will be possible to create a new folder, create a new document, or directly upload a file in the active folder.



Clicking on the three vertical dot points, present near the name of the folder, the program will open a option menu with the following possibilities:

- **Rename:** to rename the folder
- **Move in:** to move the folder in another level
- **Copy in:** to duplicate the folder and its content in another folder
- **Delete:** to delete the folder and its content

When a user clicks on Create Document it will be possible to access the following screen:

A screenshot of a web application interface for 'Creating Document'. The form is divided into several sections: 'Basic Information' with fields for Title, Document No (AUTO GEN ON SAVE), Folder Name (Default), and Assigned To (User: qnackidpeloqhowing@ppstnu.com (Alberto Cavallari)); 'Description' with a rich text editor; and 'File Information' with fields for Attachment type (File), Storage backend (Internal), File Name (Scop file), Version, and Portal Active (checkbox). A red arrow points to the 'File Information' section, which is highlighted with a red border. The footer shows 'VPM-07/21/19' and '© 2019-2021 - ners.com - License'.

In addition to the essential information it must be added other fields as shown in the previous image.

The “Attachment type” field offers the following options:

- **FILE:** upload a file from your computer to the CRM (upload); the file will be saved in the vtenext folders.
- **URL:** indicate a link to the file position (the file will not be saved in the vtenext folders)

The fields “**Visible on portal**” or “**Portal active**” allows the loaded document to be displayed to enabled contacts in the Customer Portal (see dedicated chapter).

Revision #1

Created 23 August 2023 07:23:53 by Thomas

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