

5.6 Documents

vtenext features a simple but invaluable documents manager.

Documents manager main characteristics:

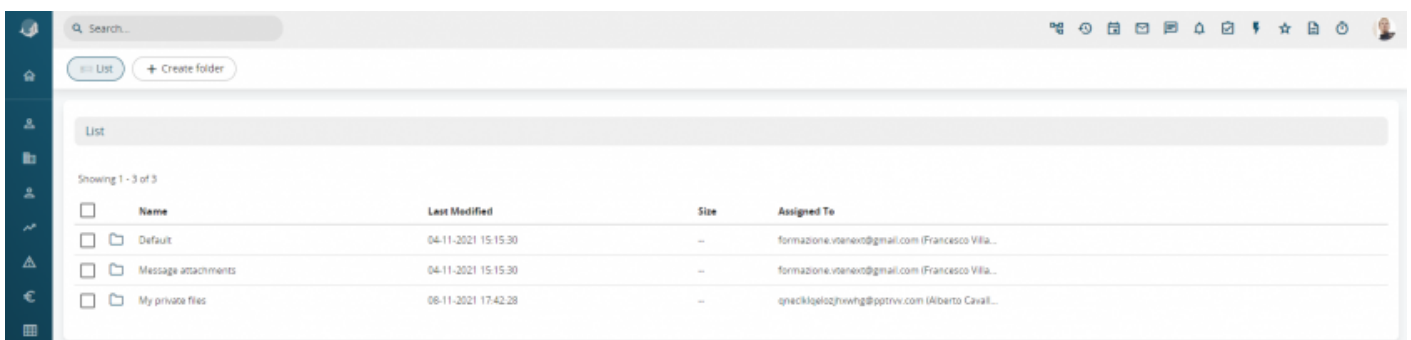
- Store file type documents (uploaded locally) or links (url from the web);
- Create folders to store documents digitally;
- Assign documents to the user responsible for managing them: e.g., if the module is set as private, each individual users can view only the documents assigned to their name;
- Share 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).

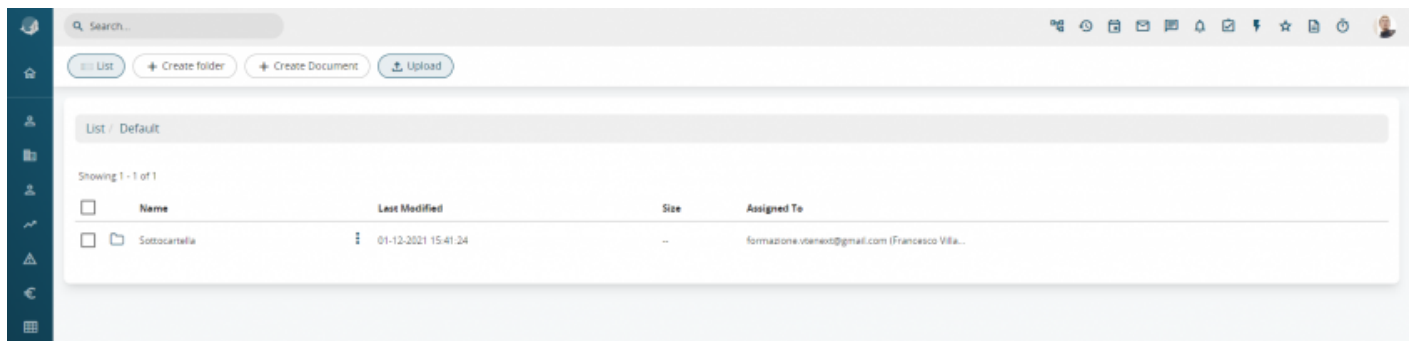
By default, vtenext have two folders loaded:

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.

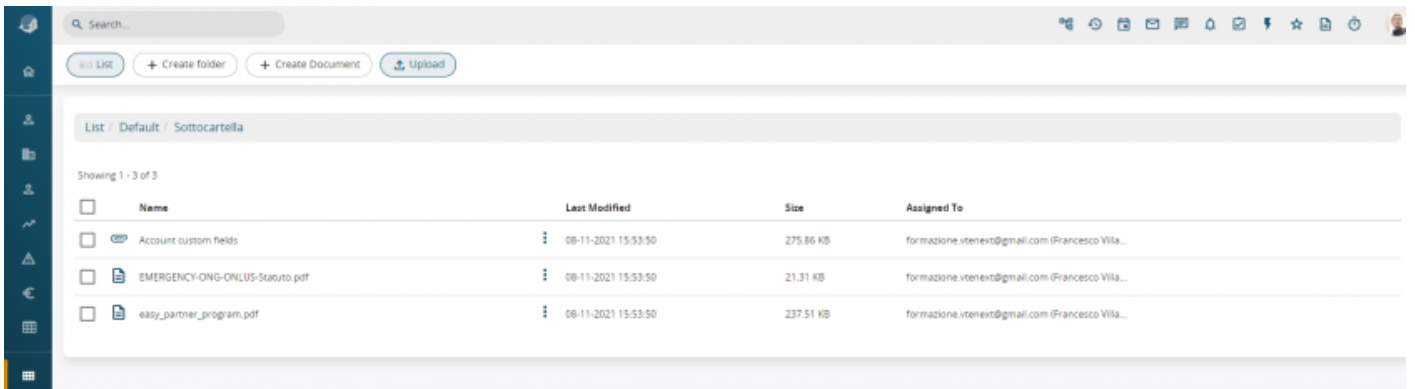
N.B.: folders containing documents cannot be deleted. First remove all the contents and then you will be able to delete the folder.



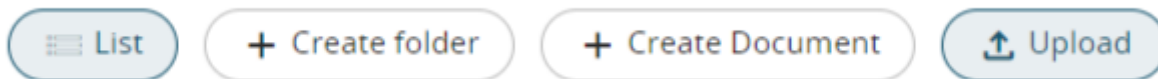
Folder list present by default in the module Documents.



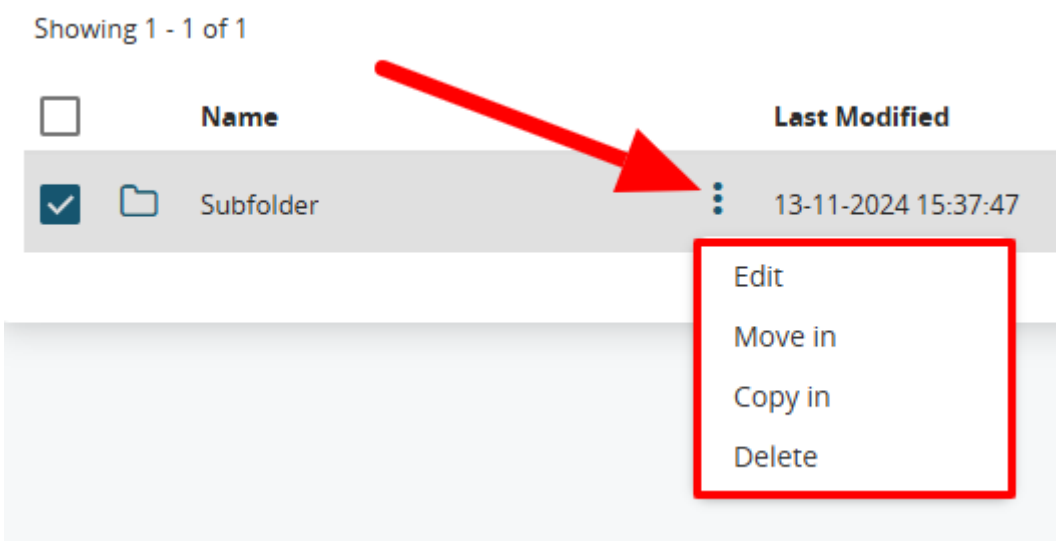
Clicking on the folder (in the example it was chosen the default folder), we can note that within this folder there is a sub- folder.



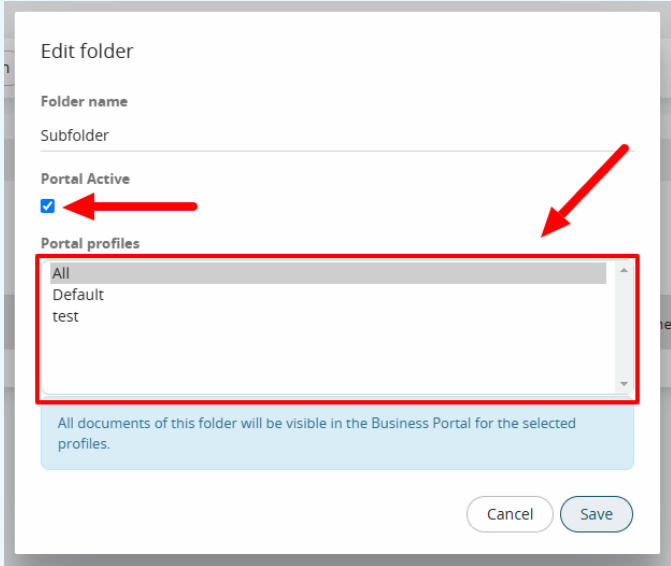
Finally, within the sub-folder there can be other files and sub-folders that can create a infinite structure. Note the path present in the head of the module.



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.



By clicking on the three dots next to the name of each Folder or Subfolder (**except for the three standard ones named Default, Message attachments, and My private files**), an options menu will open:

Edit	<p>to rename the folder or enable its display on the Customer Portal. In the popup screen that appears, you can choose a new name for the folder or decide whether to activate it on the Customer Portal, specifying which profiles can view this folder.</p> <p>Note: if the folder is not set as "Active on portal," the documents it contains will not be visible from the portal, even though they are available and active on the portal</p> <div data-bbox="813 580 1485 1144"></div>
Move in	<p>to move the folder to another level, you'll need to select the new folder/level where the folder will be relocated</p>
Copy in	<p>to duplicate the folder and its contents into another folder, you'll need to select the new folder/level where the duplication will be made</p>
Delete	<p>to delete the folder and its contents</p>

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

Creating Document

Basic Information

Title:

Folder Name:

Document No:

Assigned To:

Description

Notes:

File Information

Attachment type:

Storage backend:

File Name: Nessun file selezionato

Version:

Portal Active: ☐

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 "Visible on Portal" or "Portal Active" field allows the uploaded document to be viewed by authorized contacts within the Customer Portal (see dedicated chapter). Always remember to check that the folder containing the document is also visible on the portal, as explained in this chapter.

Download All Attachments Function

Starting from version 22.05.1, a button has been added in the related Documents section within CRM records, allowing users to download all related documents in a single zip file.

Documents (5) - List

Showing 1 - 5 of 5

Select Documents Add Document **Select or drop files here** Download all attachments

Action	Title	File Name	Assigned To	Folder Name
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	File di esempio campo formula	campo_formula.png	formazione.vtenext@gmail.com (Bruce Wayne)	Subfolder
	media test	ARUBA.png	formazione.vtenext@gmail.com (Bruce Wayne)	Default
	NIBE09.pdf	NIBE09.pdf	formazione.vtenext@gmail.com (Bruce Wayne)	Default
	tcibd0501m000_600_20230301-143408.xlsx	tcibd0501m000_600_20230301-143408.xlsx	martina.salmeri@gmail.com (Martina Sal)	Default
	test	Screenshot_2023-03-07_130641.png	formazione.vtenext@gmail.com (Bruce Wayne)	Default

Revision #6

Created 2 September 2024 07:59:00 by Admin

Updated 13 November 2024 14:49:30 by Admin