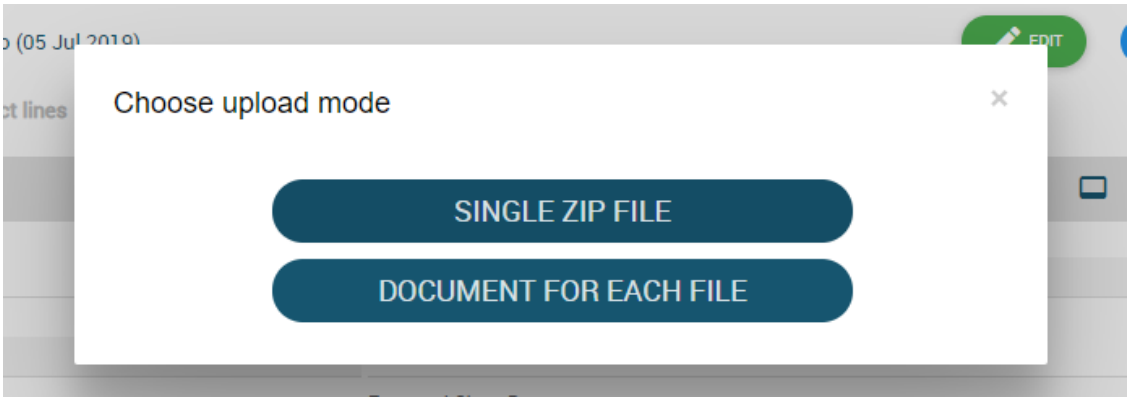
5.6.2 Create new document from related list

Opening DOCUMENTS in a CRM entity makes it possible to upload one or more files using drag and drop. The system will present a popup that allows you to choose the upload method: individual files or single file in .zip format. The next step allows the user to change the name of the document, choose the destination folder and add an optional description.

Two checkboxes allow the user to select whether or not the document is active and visible on the Customer Portal.





Revision #1
Created 2026-01-28 14:56:14 UTC by Admin
Updated 2026-01-28 14:56:14 UTC by Admin