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# **Document Management**



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## 1. Introduction

There is a document storage facility on the BluWave Software system, where the users could save documents in folders that the System Administrator can define. These are stored permanently on our secure server.

BluWave Software allows users to associate a document to the following forms on the system:

- Activities
- Opportunities
- Emails
- Current Products
- Job Cards

In order for documents to be added to these forms, the system would need access to those documents. The only way for Bluwave to have access to these documents are if they are uploaded to our secure server.

This feature not only allows the user to associate the correct documentation with records on the system, but also allows access to those documents anytime & anywhere. This would be another centralization of information feature of the system.

This storage facility should only be used to store customer related documentation as well as marketing and company related documentation.

We do not recommend using this facility for storing all your company documents.

There is an 8MB per individual file size limit.

Administrators should create folders and subfolders on the BluWave document management area to allow for uploading marketing materials and quotes created by the system. These documents can then be attached to emails and sent to customers.

Folders can either be public or private.

**Public Folders** are folders where other users would be able to view the content, but not change or delete. A Sales manager could have a public folder dedicated to marketing brochures and catalogues.

**Private Folders** are used for users to add in different documentation necessary. Each user should have at least one folder to their name in order to store documents on the secure server.

By sending quotes from BluWave, the system will automatically create a folder called "Quotes" and the year as the subfolders and save a copy of the quote in there.

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## 2. Viewing the Document Management page

To view the Document Management page, click on the System Setup Tab and then the Documents sub-tab

The **top portion** of the screen will allow the user to add documents to the server from their computers, while the **bottom portion** will allow the user to search and view the documents that are stored in the different folders.

ome	Activities	Le	eads	Contacts	Companies	Opportunities	Reports	System Setup	Financials	List Manager		
CRM S	etup   Administ	er Users	s   Edit Pro	file   Imp	orts   Quote S	etup   Pricelist	Management	Documents	Volume Pricing	Workflow		
0	Count		Docun	nent Mar	agement							
~	Search	_ [	Upload yo	our Files t	o the Server							
Search			Sales Staff		1	Vichelle Snyder	S			•	0	
Within F	lease Select	•	Save in Fold	ler/Subfolde	r [					▼ Ade	d/Edit Folders	
			Select your	file to Uploa	d:	Choose File N	o file chosen	I				-
0	Quick Create		Description	of your File:								
-						Upl	oad File					
Please	Select	· ·	Search: C	a anala la s		File Name		The December				-
			Search: S				۲	File Description			_ 0	
NUR	Calendar		F	lease type	in your searc	h				Search		·
≤ S	eptember 2019	≥	Filter files:	Sales	Staff: Michell	e Snyders	Folder:	(All Folders)	▼ Sub	Folder:		T
Mo Tu	We Th Fr Sa	Su	Uploaded	Folder	Sub Folde	r Sales Rep	File Descrip	tion	File Name			
26 27	<u>28 29 30 31</u>	-	20/08/2019	Company Docs		Michelle Snyders	download (1)		download (1	).png	Dload View	<u>/ Del</u>
2 3	<u>4 5 6 7</u> <u>11 12 13 14</u>	8	08/08/2019	Company		Michelle	393783-200	$\backslash$	393783-200	.png	Dload View	/ Del
<u>9 10</u>	11 12 13 14	10		Docs		Snyders		$\backslash$				

The user will be able to search for a specific document by typing in either the file name or file description in the search field and then clicking on the **Search button**. The user could also change under which Sales staff the search should be done by changing the filter settings in dropdown fields below the search field.

Ν

Once the user has found the file they were looking for, the user could either **Download**, **View** or **Delete** the file (depending on their user rights).

# 3. To Add Folder/ Subfolder for the Users

To view the Document Management page, click on the **System Setup Tab** and then the **Documents sub-tab**.

			Na			÷ Z.				Getting Sta	arted   User P	rofile   Log Out?
Home	Activitie	\$	U	eads	Contacts	Companies	Opportunities	Reports	System Setup	Financials	List Manager	
CRM Se	etup   Adr	niniste	r User	s   Edit P	rofile   Imp	orts   Quote S	etup   Pricelist	Management	Documents	Volume Pricing	Workflow	
$\mathbf{P}$	Search					nagement to the Server						
Search				Sales Staf			Aichelle Snyder	S			T	0
Within F	Please Sele	ct	•	Save in Fo	Ider/Subfolde	er 🗌					▼ Ad	d/Edit Folders
				Select you	r file to Uploa	ad:	Choose File N	lo file chosen				
	Quick Crea	ate	•	Description	n of your File		Upl	oad File				
	Calendar				Search by Please type	Field 🤇	File Name	۲	File Descriptior		Search	0
≤ S	eptember 20	19	≥	Filter files	: Sales	Staff: Michell	e Snyders	Folder:	(All Folders)	V Sub	Folder:	•
Mo Tu	We Th Fr	88	su	Uploaded	Folder	Sub Folde	r Sales Rep	File Descrip	tion	File Name		
26 27 2 3	28 29 30 4 5 6	<u>31</u> 7	1 8	20/08/201	9 Company Docs		Michelle Snyders	download (1)		download (1	).png	Dload View De
2 <u>3</u> 9 <u>10</u>	<u>11</u> <u>12</u> <u>13</u>	1 <u>4</u>	-	08/08/201	9 Company Docs		Michelle Snyders	393783-200		393783-200	png	Dload View De

To add folders for users, click on the Add/Edit Folders button.

Document Folder Maintenance									
Ad	d New Folder	▼ Sales Staff	Michelle S	Gnyders	¥				
Туре	New Folder Name:			Public Fol	der?				
		Save Folder	Exit						
	Sales Staff	Folder Name	Public Folder	Sub Folder Name					
Delete	Michelle Snyders	Company Docs	True	Jub Folder Name					
<u>Delete</u>	Michelle Snyders	Quotes	E False	2019					
Delete	Michelle Snyders	ServiceRequests	True	2019					

The first dropdown field will allow the user to either add in a **new folder or sub-folder**.

Then the sales staff would be selected to specify who the folder would be belong to.

The **folder name** could be anything; we suggest keeping it descriptive.

By checking the **Public Folder? Checkbox,** the folder and its contents would be visible to other users. They would however not be able to delete any documents in that folder.

## 4. Attaching a File to the System

To attach a file to the system, the user could either attach it directly to the **Document Management page** or add the file to the server from one of the forms that allow the attachment of documents (Activities, Opportunities, Emails, Current Products or Job Cards).

### 4.1 From the Document Management page

To access the Document Management page, click on the **System Setup Tab** and then the **Documents sub-tab.** 

#### 4.1.1 Step 1: Where to save the File on the Server

The user will choose under which **sales staff** and then what **folder** to save the file under on the secure server.

Document Manage	ement /									
Upload your Files to the Server										
Sales Staff	Michelle Sny	/ders	¥	0						
Save in Folder/Subfolder			•	Add/Edit Folders						
Select your file to Upload:	Company D Quotes \ 201									
Description of your File:	Description of your File: ServiceRequests \ 2019									
	ServiceRequ	uests \ 2020								
Search: Search by Field	○ File Name	e 💿 File Descripti	on		•					
Please type in y	our search		S	earch	0					
Filter files: Sales Stat	f: Michelle Snyders	Folder: (All Folders)	Sub Folder:		•					
Uploaded Folder	Sub Folder Sales	Rep File Description	File Name							
29/01/2020 ServiceReques	ts 2020 Miche Snyde	Company for January	By Quotes Issued Vs Ta Company for Januar		View Del					

### 4.1.2 Step 2: Finding the File on the Users' Computer

After making that selection, the user would click on the **Choose File button** to search for the file in mind on their computer.

Document Management										
Upload your Files to the Serve	Upload your Files to the Server									
Sales Staff	Michelle Snyders	0								
Save in Folder/Subfolder	Save in Folder/Subfolder Company Docs									
Select your file to Upload:	Choose File No file chosen									
Description of your File:										
	Upload File									

The user would then select the file on their computer and click on the **Open button** at the bottom of the screen.

open			
	is PC > Pictures > Bluwave	~	ර Search Bluwave , p
Organize 👻 New folde	er		⊑ - □ ?
<ul> <li>✔ Quick access</li> <li>▲ OneDrive</li> <li>▲ This PC</li> <li>▲ 3D Objects</li> <li>▲ Desktop</li> <li>④ Documents</li> <li>▲ Downloads</li> <li>▲ Music</li> <li>▲ Pictures</li> <li>֎ Videos</li> <li>≅ OS (C:)</li> <li>⇒ Data (D:)</li> <li>♦ Network</li> </ul>	waves_sea_water stream_5037_25 60x1440		Select a file to preview.
File na	ame:		
	-		Open Cancel

After clicking on the **Open button**, the name of the file will appear in the **Description field**.

Document Managemer	nt		
Upload your Files to the Ser	ver		
Sales Staff	Michelle Snyders	۲	0
Save in Folder/Subfolder	Company Docs \	۲	Add/Edit Folders
Select your file to Upload:	Choose File waves_sea_water_stream_5037_2560x1440.jpg		
Description of your File:	waves_sea_water_stream_5037_2560x1440		
	Upload File		

The user could change the Description of the file or leave it as is.

#### 4.1.3 Step 3: Uploading the File to the Server

Click on the **Upload File button** to save that file on our secure server. Once the file is saved, the user would be able to view that file in the folder where they have saved it (in the bottom portion of the document management page).

	earch by Field ease type in you		) File Na	me	۲	File Descrip	tion	/	s	earch	0			
Filter files:	Sales Staff:	Michelle	e Snyders	5 <b>v</b>	Folder:	(All Folders)		•	Sub Folder:		•			
Uploaded	Folder	Sub Folder	Sales Ren	File Des	scription		<b></b>		File Name					
03/02/2020	Company Docs		Michelle Snyders	waves_	sea_water	_stream_5037_	_2560x14	140	waves_sea_wate	er_stream_503	7_2560x1440.jpg	<u>Dload</u>	<u>View</u>	<u>Del</u>
29/01/2020	ServiceRequests	2020	Michelle Snyders		2020.pdf	Target By Com	pany tor		Quotes Issued v January 2020.pd		mpany tor	<u>Dload</u>	View	<u>Del</u>
				Born to	Ride Force	ed to Work_ Thi	is funny		Born to Ride For	ced to Work 1	This funny biker			

### 4.2 From the Activities, Opportunities, Email, Current Product or Job Card forms

To attach a document to the system from one of these forms, the user will follow the same steps as mentioned above in the **4.1 From the Document Management Page section**, but the user will have to complete one additional step in order to attach the file to the form.

#### 4.2.1 Accessing the Document Management page

First the user would need to access the document management page, by clicking on the **Attachment button** at the bottom of the page.

edit C	Opportunity Update Canc	el	
Opportunity Details			
Sales Staff:	Michelle Snyders <ul> <li>Image: The state of the state</li></ul>	Status:	Enquiry
Company:	Adams&Adams	Probability %:	0
Contact:	Gladyce Moore 🔹	Value:	0
Opportunity Name:	5 printers	GP Value:	0
Order No		Created By:	Michelle Snyders
Expected Order Date:	29/02/2020	Next Activity:	Telephone Call
Product:	QP - Quoted Products	Activity Date:	24/01/2020
Note:		Quote/Opp No:	1137
			Create Quote
		Quote Due:	×
		Quote Submitted:	×
		Invoice No/Date:	23/01/2020
Opportunity UDF1	0		
Attachment:			View File
	Update	Cancel	

#### 4.2.2 Step 4: Attaching the File to the Form

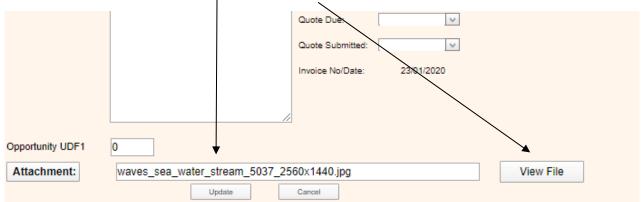
After clicking on the **Attachment button**, the document management page will open, and the user can then do one of two things:

- 1. Either Upload a new file to the system by following **Step 1 to Step 3** discussed in the previous section and select the document from the server (the bottom portion of document management page).
- 2. Or just select an existing file from the server (the bottom portion of document management page).

To attach the required file to the form, the user would only need to find the specific file and click on the **Select link** at the left side of the page.

Documen	Document Management Select an existing file or Upload a new file and select it.									
Upload your Files to the Server										
Sales Staff		Michelle Sr	lyders	•	] 🚺					
Save in Folder/S	ubfolder			۲	]					
Select your file to	Upload:	Choose Fil	e No file chosen							
Description of yo	ur File:									
			Upload File		-					
Search: Search	ch by Field	File N	ame       I File Description							
Pleas	e type in yo	our search			Search					
Sales Staff: N	lichelle Sny	ders 🔻 Fold	ler: (All Folders)   Sub Folder	er:	T					
•	Uploaded	Folder	File Description	File Name						
Select	03/02/2020	Company Docs	waves_sea_water_stream_5037_2560x1440	waves_sea_wat	ter_stream_5037_2560x1440.jpg					
Select	29/01/2020	ServiceRequests	Quotes Issued Vs Target By Company for January 2020.pdf	Quotes Issued \ January 2020.pd	/s Target By Company for df					

After clicking on the **Select link**- the **file chosen** will appear on the form. The user would then be able to easily view the file by clicking on the **View File button**.



## 5. Specifications for Document Management

There are a few things to keep in mind with document management:

The system will only upload files that are less than 8MB in size.

The system won't the upload of files in the following formats:

- .CSV file
- Files that contain Macro procedures.

When uploading documents to the different forms, the system will only allow the user to add **one document** to each form (with the exception of the Email form- this form allows the user to select more than one document to attach it to the email, by checking the checkboxes next to each file and then clicking on the **Done, Return to Email button**).

If more than one document needs to be associated with the form, we suggest the user create a Zip Folder on their computer and attach that to the form.

We also suggest that when attaching documents to the system that needs to be associated with a specific company or quote/opportunity number, to include that into the file description.

For instance, when uploading an external quote done in excel or word to name it: Company name- Quote Number. I.e. Adams&Adams- Quote 1254.