Spec for Document Management in
BluWave crm

Updated 31/5/2013

BluWave crm Document Management Spec

1. Any user can upload documents into any of their own folders.
   Managers can upload documents in to their won folders and any folders for users in the same branch.
   Executive users can upload documents into any user's folders.

2. Any user logged in can add, remove folders and mark them as Public or Not.
   They will default as NOT public.
   Public folders allow other USERS access to documents stored in these folders.
   - USERS can access ALL their **own folders** and any All PUBLIC folders.
   - MANAGERS can access ALL folders for ALL users within the **same Branch** and All PUBLIC folders.
   - EXECUTIVE users can access **ALL folders** for ALL users.

3. Files than can be uploaded cannot be larger than 2MB in size.

4. The following File types are supported:

.doc	.docx	.xls	.xlsx	.ppt	.pptx
.zip	.jpg	.jpeg	.bmp	.html	.pdf
.rtf					

5. When sending an ad-hoc email – multiple documents can be attached to the email.

6. When emailing a quote, additional documents can be attached to the email.

7. Appointments can have a document attached to them.

8. Opportunities can have a document attached to them.

9. When a Quote is emailed, before the email is sent, a Quotes folder and subfolder for the current year will be created if that folder does not exist. The system stores all quotes generated in the BluWacve quotes function in the document storage area under that reps Quotes folder, under a sub-folder for the current year e.g. quotes\2013.

10. Folders can only be administered by the current users or the users manager or executive user.

11. Folders cannot be deleted if they contain documents within them.

12. Documents can be Downloaded (Dload) onto your local machine, Viewed on your local machine or deleted from the server.

13. Documents can be searched on **File Name** or Description from any of the Document Management screens.