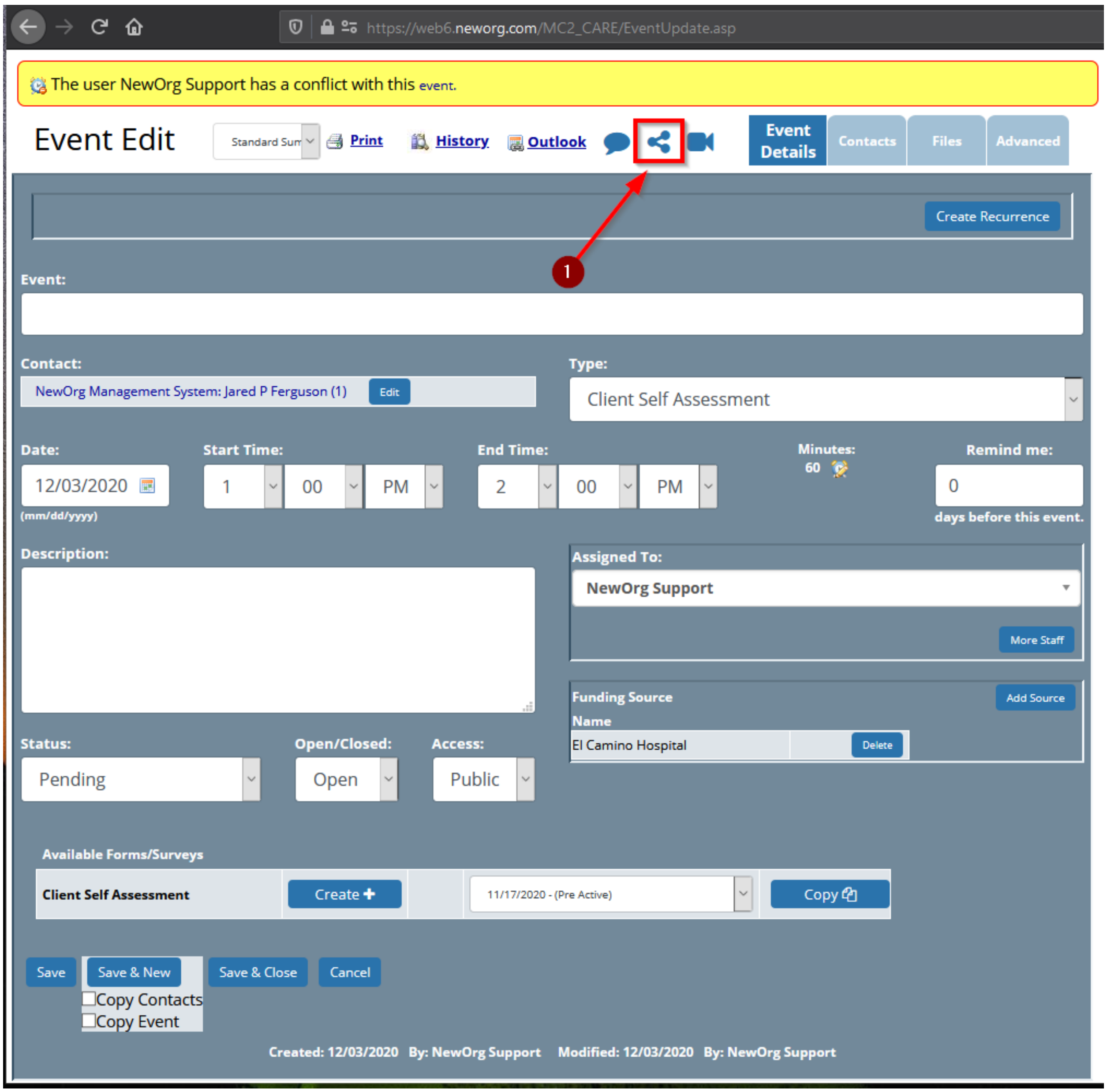
File Sharing & Document Center User Manual

Contents

12/4/20

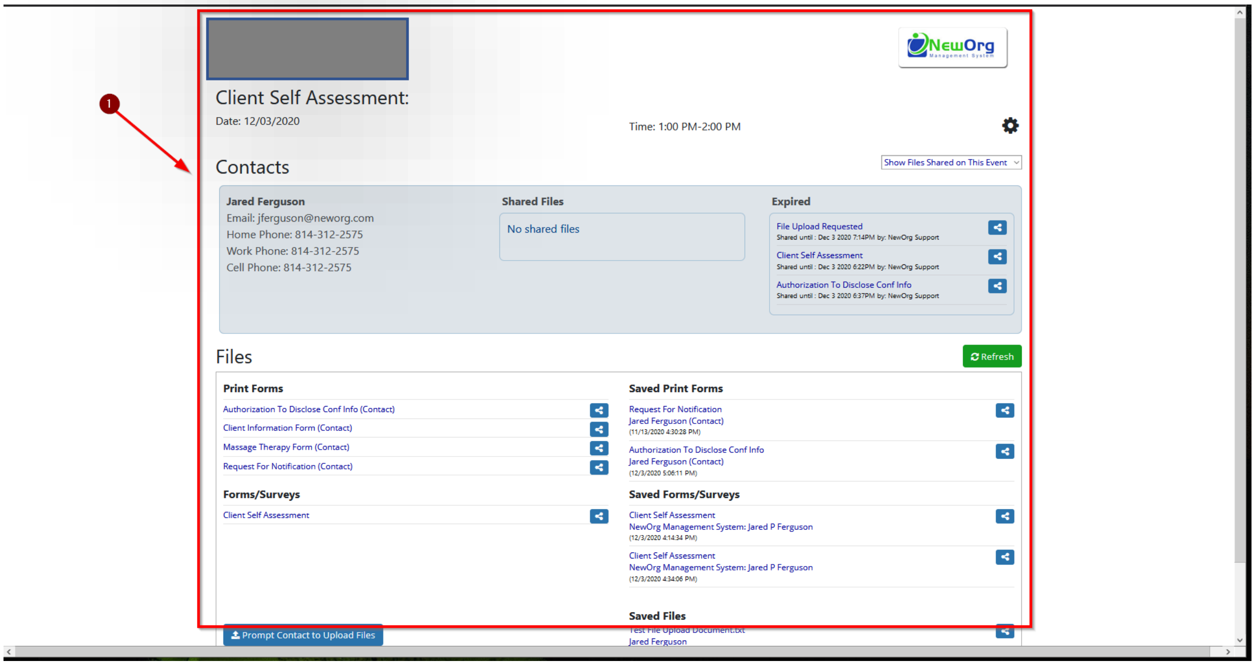
Accessing The File Sharing Display

Note: From any event, after you click 'Save', the 'File Share' icon at the top of the event will display.



1) Click the 'File Share' icon

Note: This will then navigate you to the File Share Display

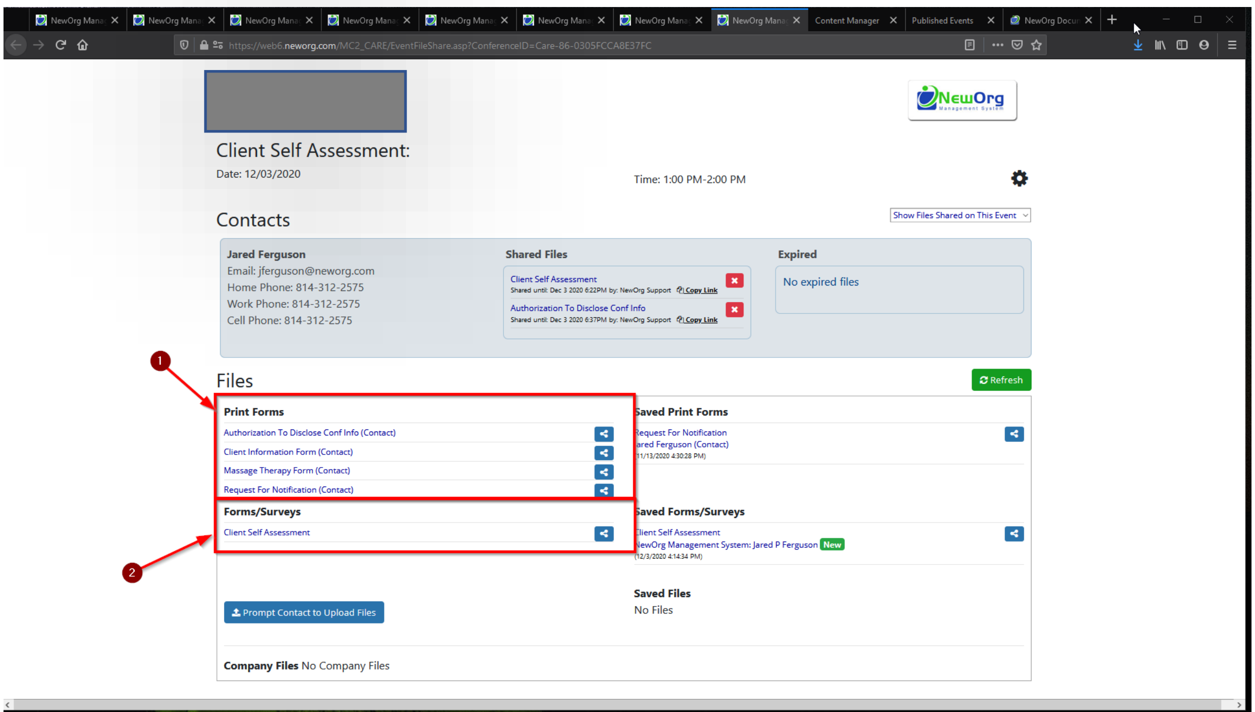


Determining Which Surveys/Forms/Print Forms Are Available

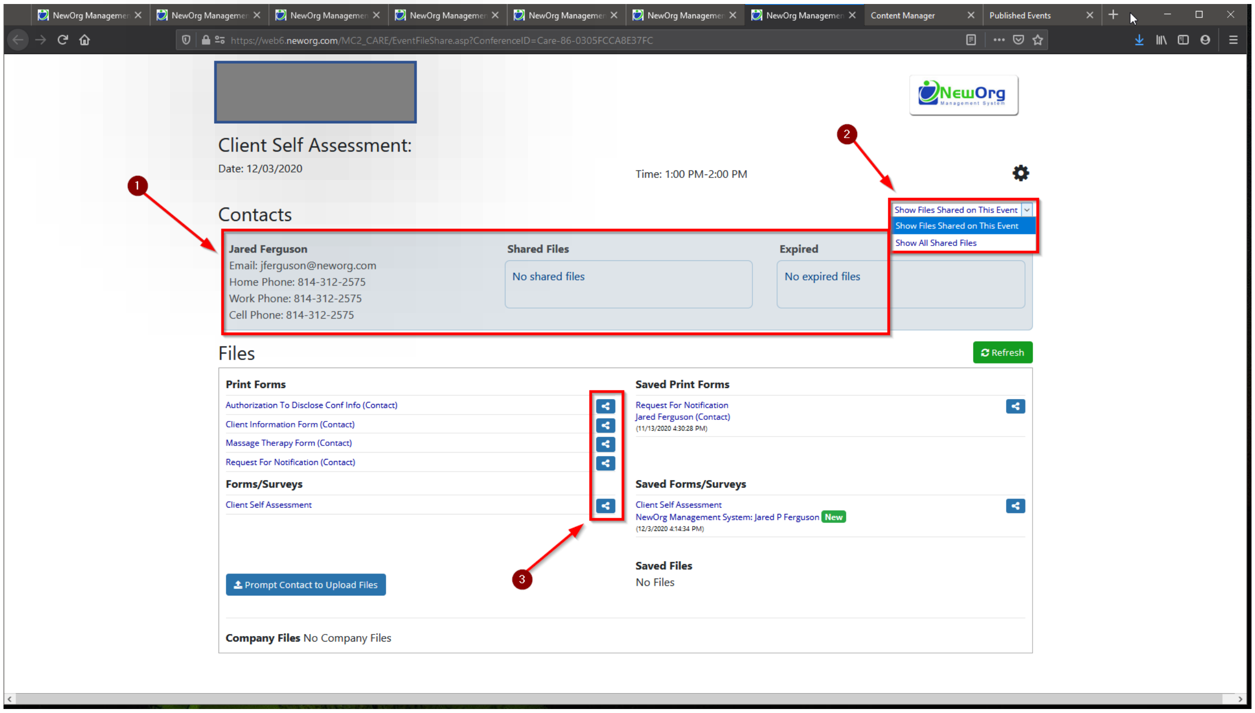
Note: Depending on the 'Event Type' selected will determine which 'Surveys/Forms' are available.

The 'Event Type' will determine which 'Print Forms' are available as well (Forms available in the 'Standard Summary' dropdown of the 'Event'.).

Related to Print Forms, depending on the 'Contact Group' the contact is in, will also determine which 'Print Forms' are available for sharing.

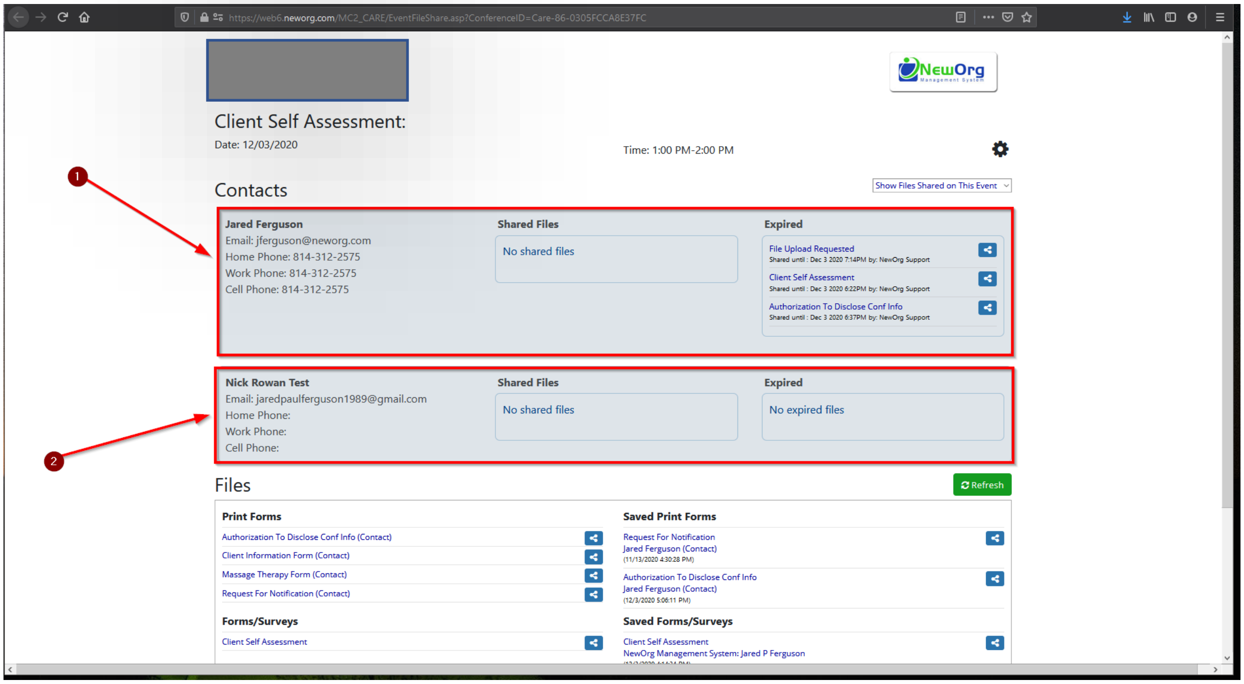


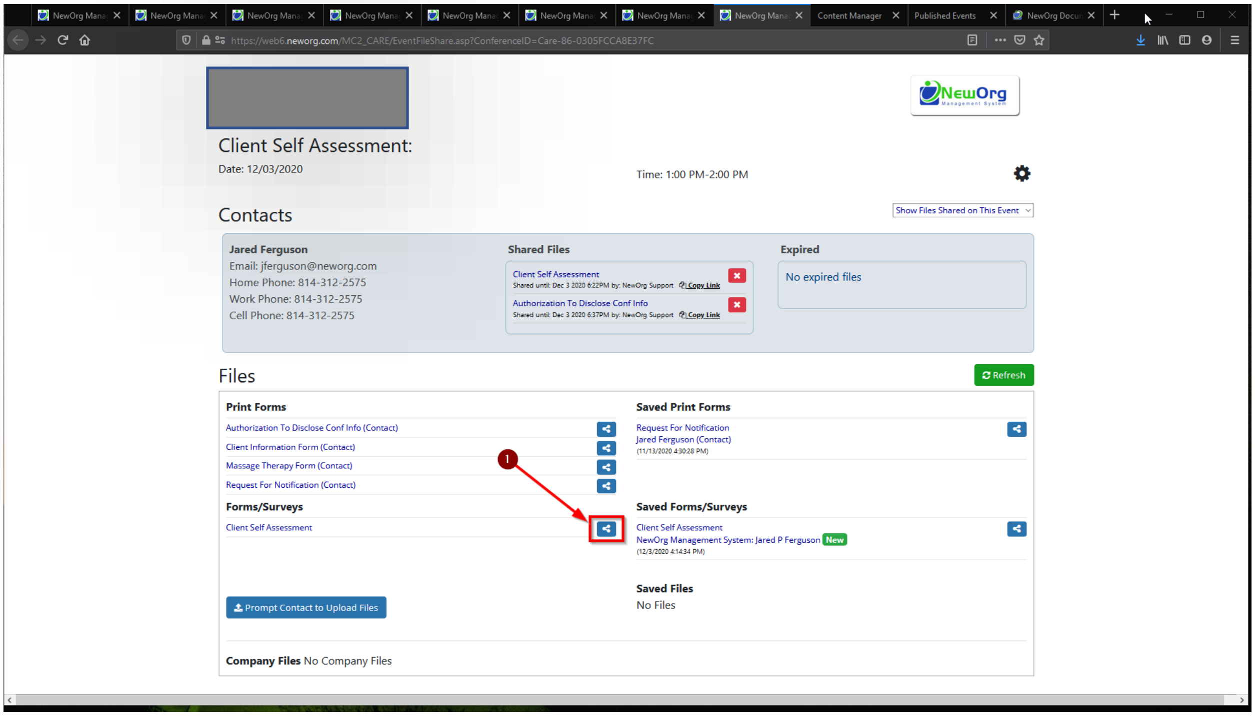
Sharing A Survey/Form



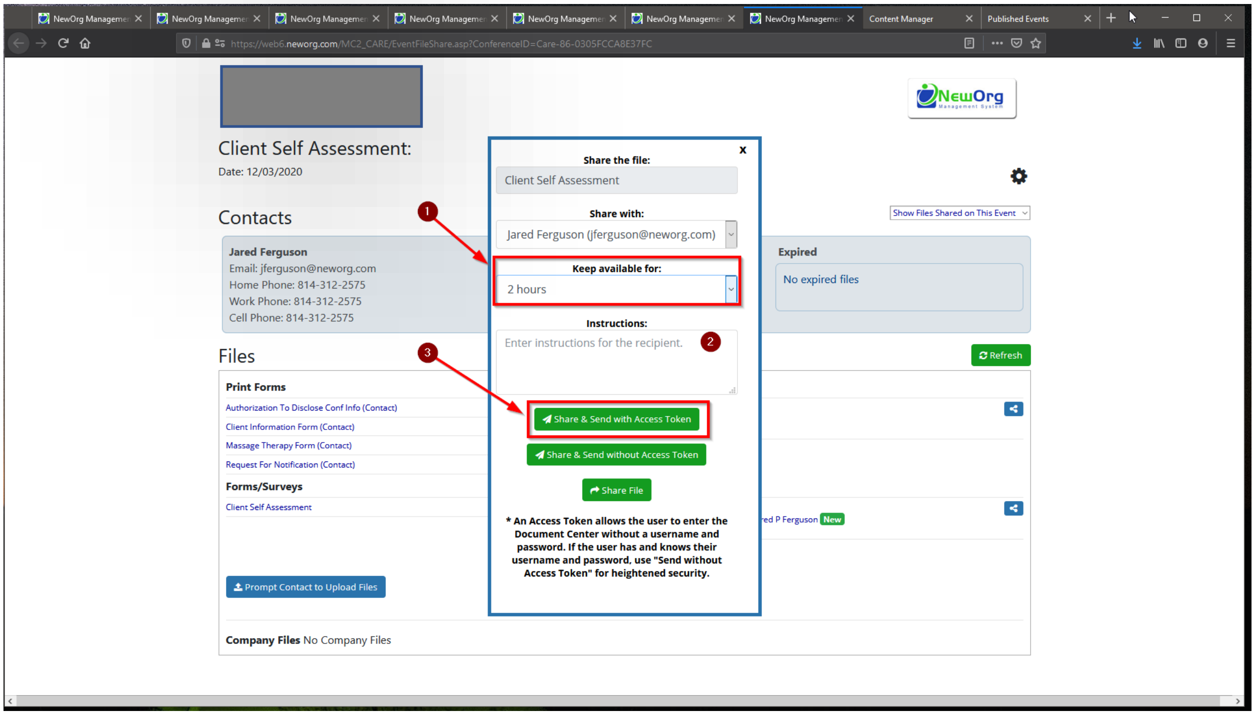
1) The Contact Details will be displayed below the name of the contact in the event.
2) You can view historical 'Files Shared on this Event' or 'Show All Shared Files'.
3) To Share a file, click the 'File Share' icon next to the file name. Be it a 'Survey/Form' or 'Print Form'.

Note: If there is more than once contact in the 'Event', each contact details will be displayed.





1) Click the 'Share' icon next to the 'Survey/Form' you wish to share.



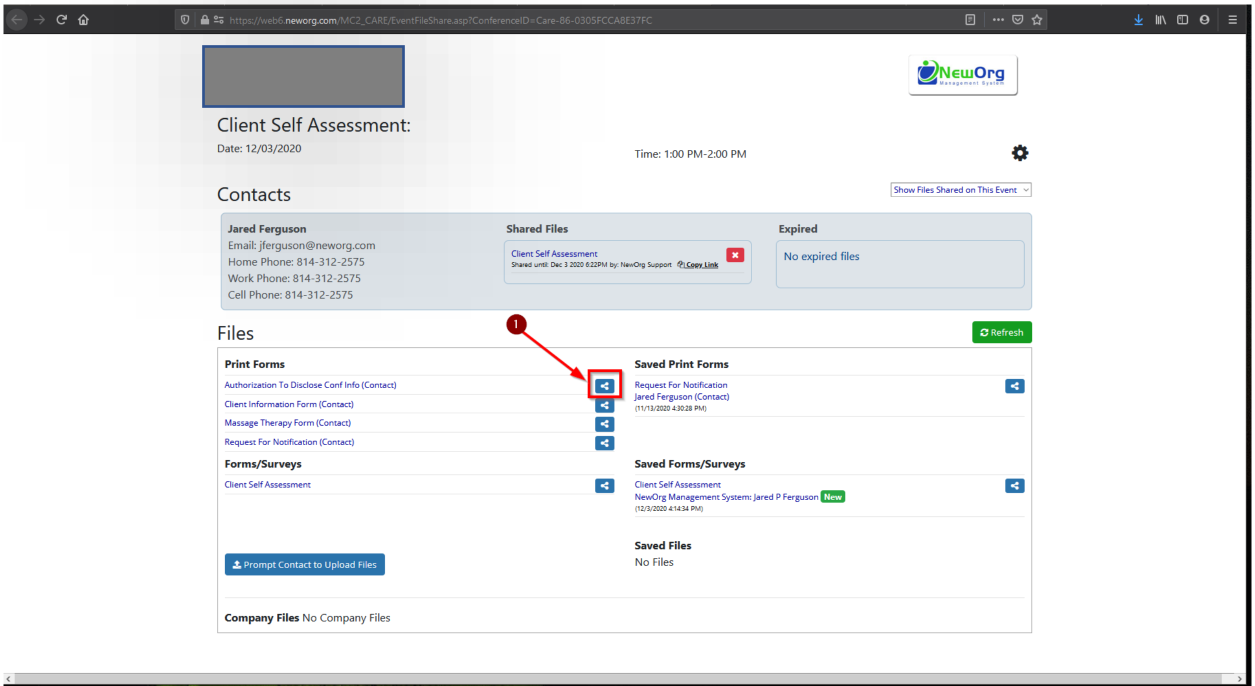
Note: If more than once contact in the 'Event', the 'Share With' dropdown will display each contact records name.

1) Enter the duration for which you wish the file to be available for the client.
2) Enter instructions for the client about the form/file.
3) Click 'Share & Send with Access Token'

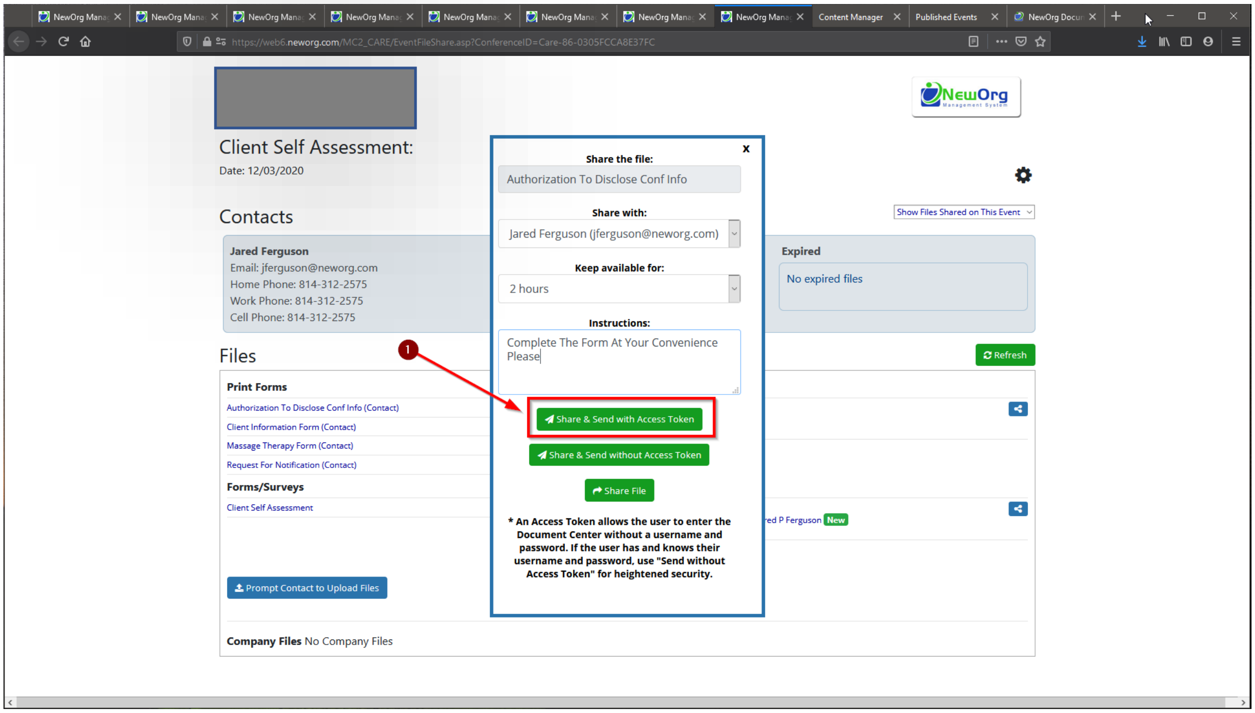
Note: This will send an email to the client directly with a secure link to access the file using a Token.

Sharing A Print Form

Note: Sharing a Print Form via the File Sharing –

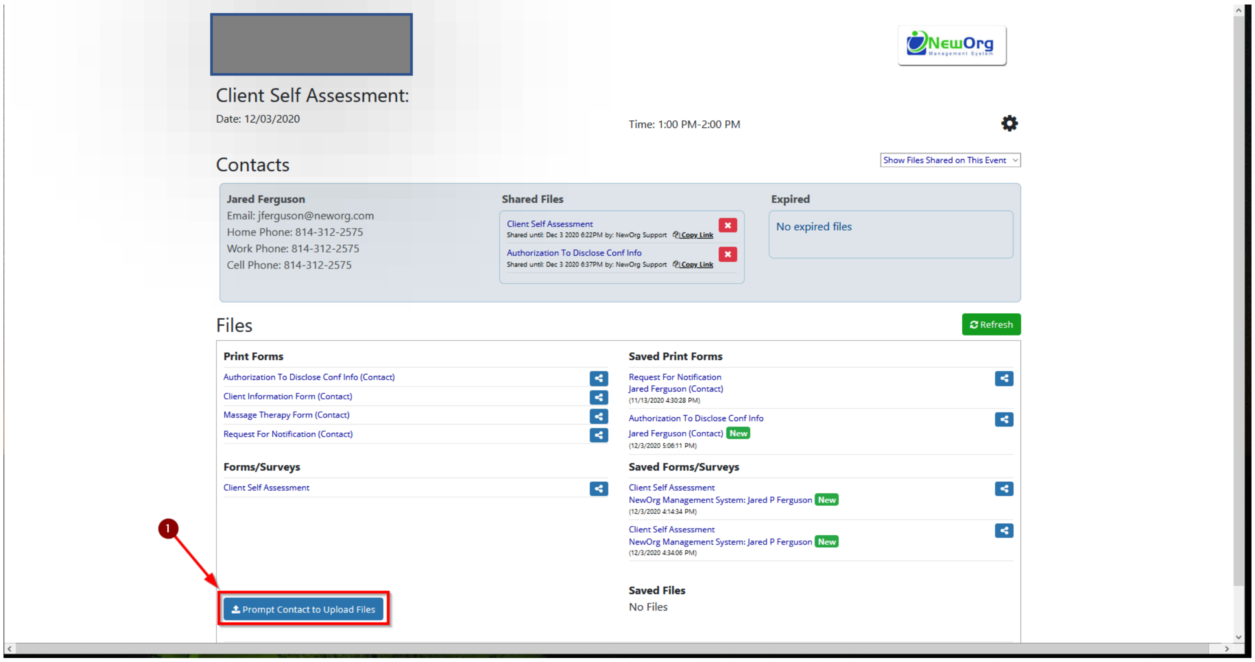


1) Click the 'Share' icon next to the Print Form

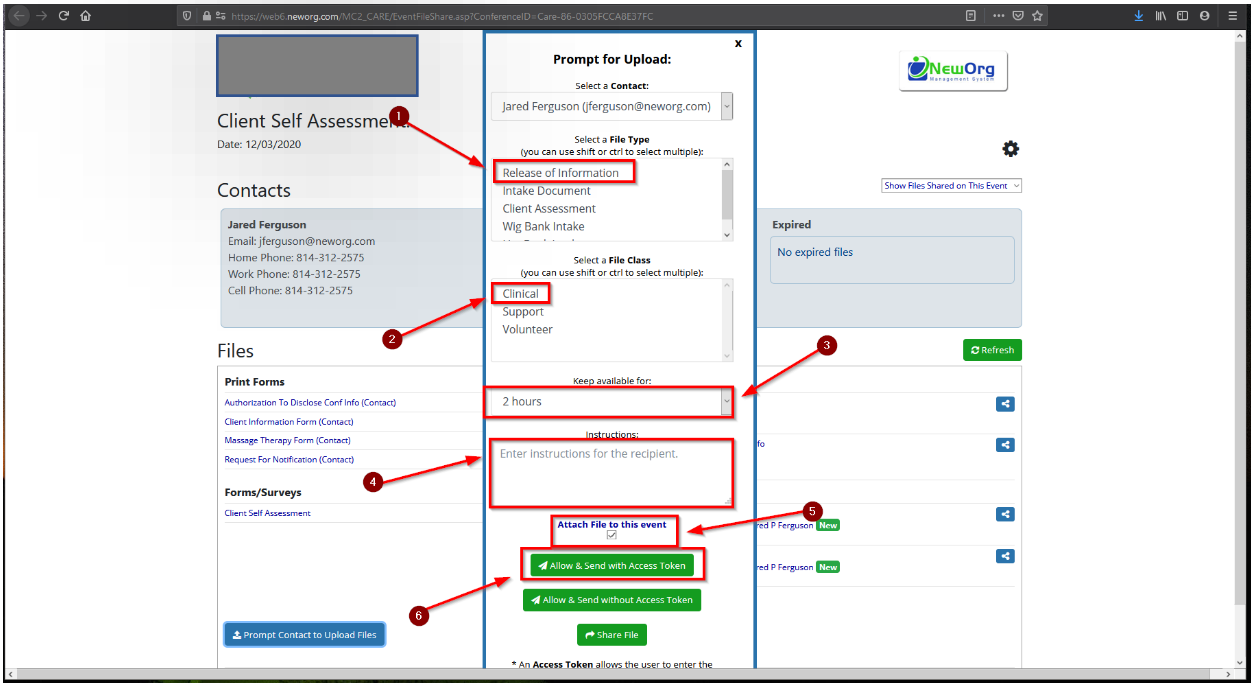


1) Enter the details of how long you wish the file to be available, instructions, and click ‘Share & Send With Access Token’.

Prompting the Contact To Upload a File



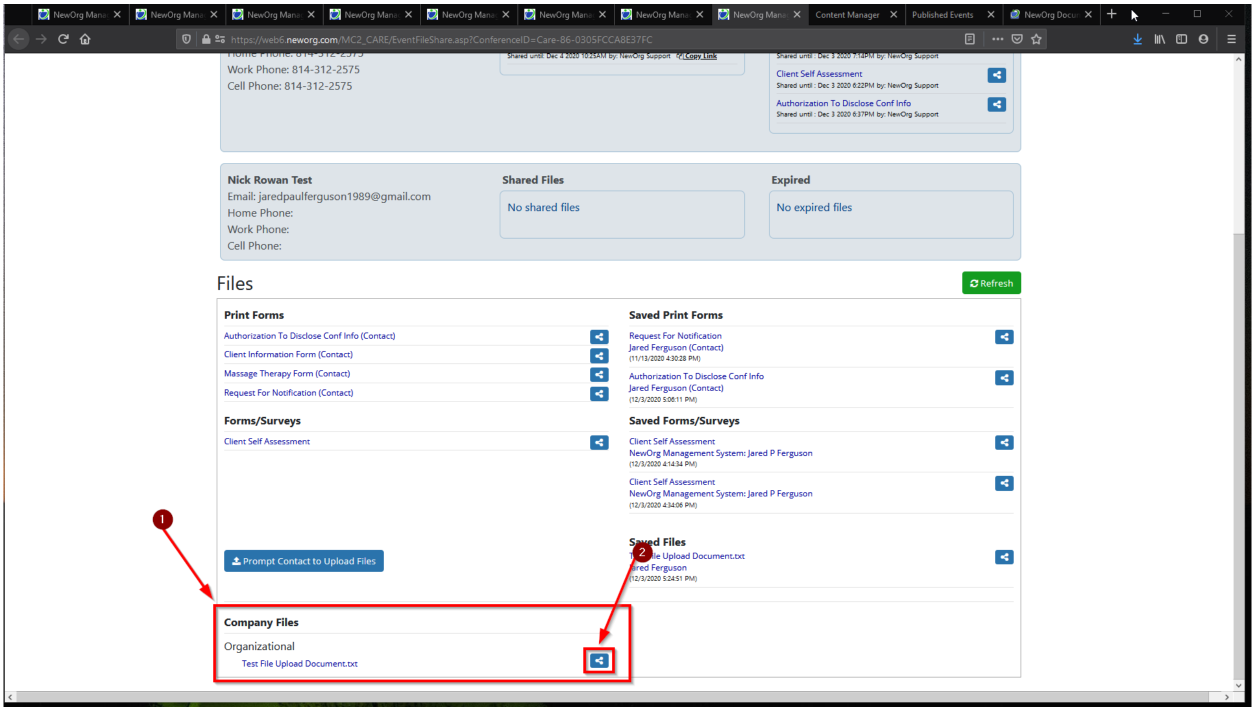
1) Within the ‘File Sharing’ display, click ‘Prompt Contact to Upload Files’.



1) Specify which ‘File Type’ should be uploaded.
2) Specify which ‘File Class’ should be uploaded.
3) Select your Duration for how long the contact has availability to upload.
4) Enter instructions for the recipient regarding the file upload.
5) Keep the ‘Attach File to this Event’ checked if you wish for the file to be uploaded to the ‘Files’ tab of the event. Uncheck the checkbox if you wish for the file to be uploaded to the ‘Files’ tab of the ‘Contact View’.
6) Click ‘Allow & Send with Access Token’.

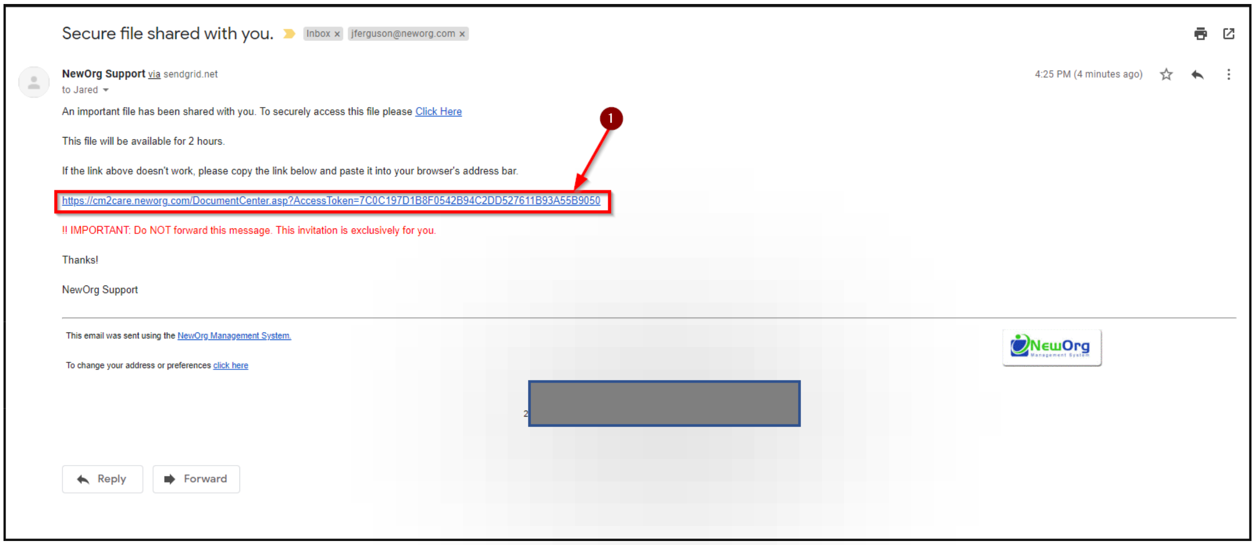
Sharing Company Files

Note: Files uploaded to the 'Files' tab of the system will be available for sharing.



1) Under 'Company Files'
2) Click the 'Share' icon next to the company file you wish to send to the contact.

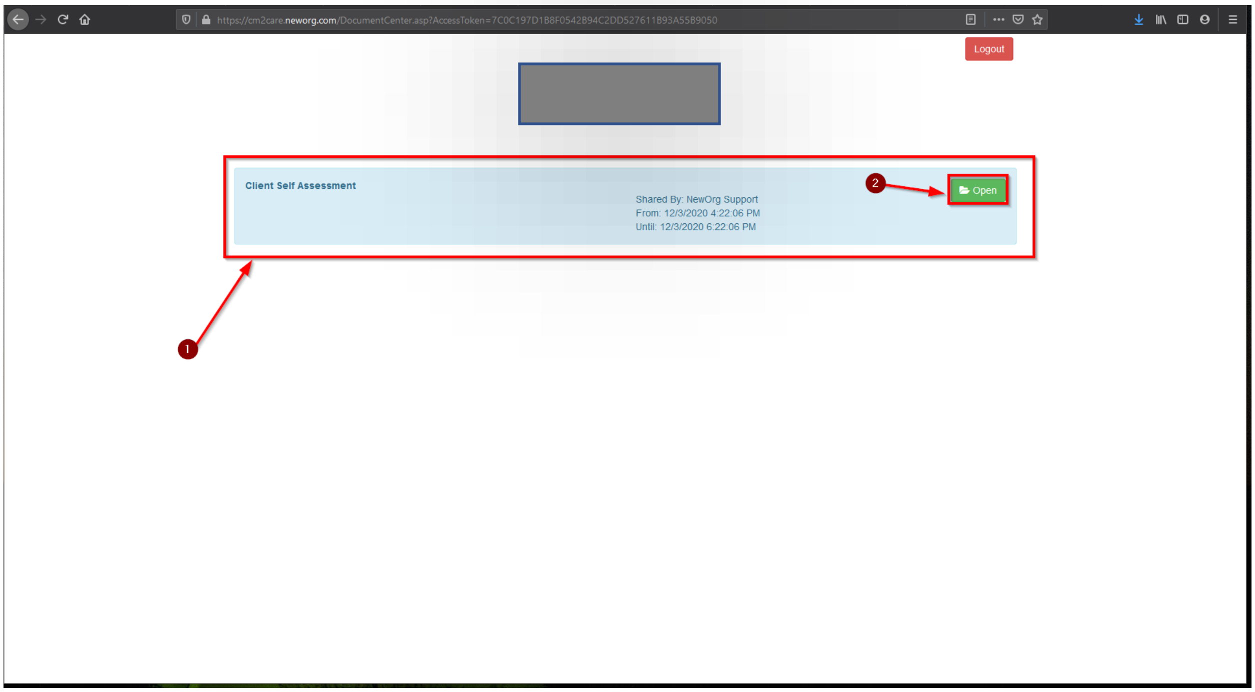
Recipient View and Actions



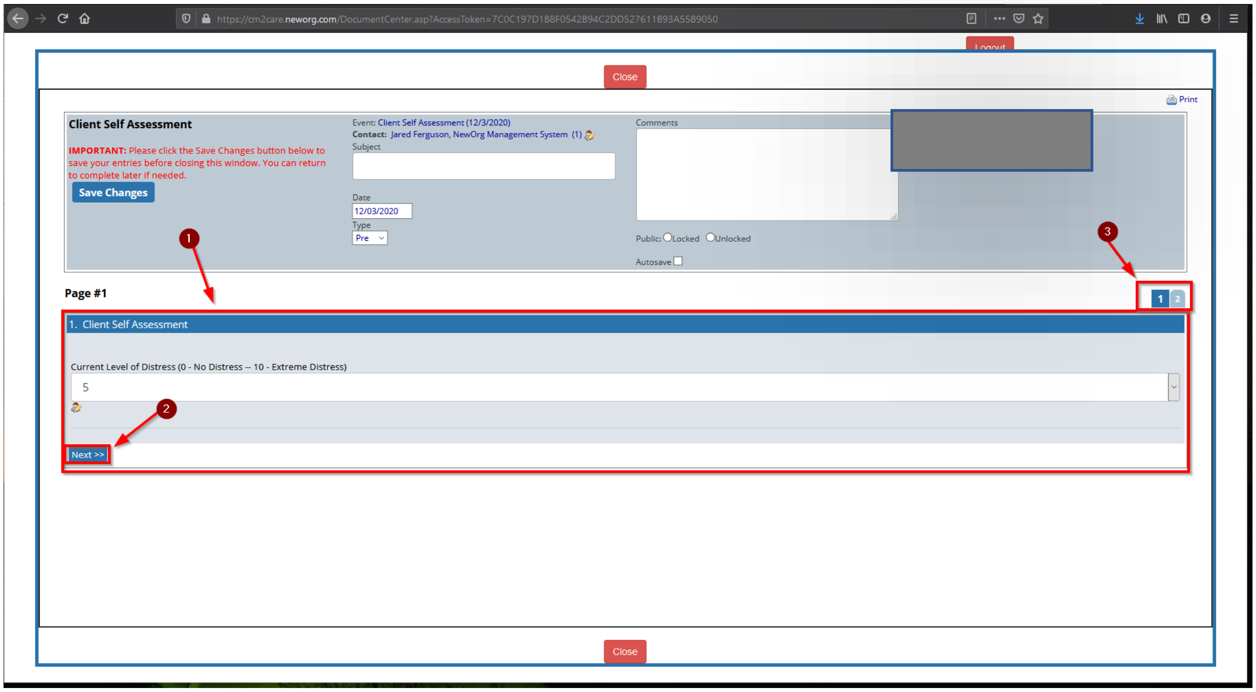
1) The Contact will receive the email in their inbox with a secure link containing the token to access the Document Center.

Note: Single Files or Multiple Files will now be displayed in the Document Center.

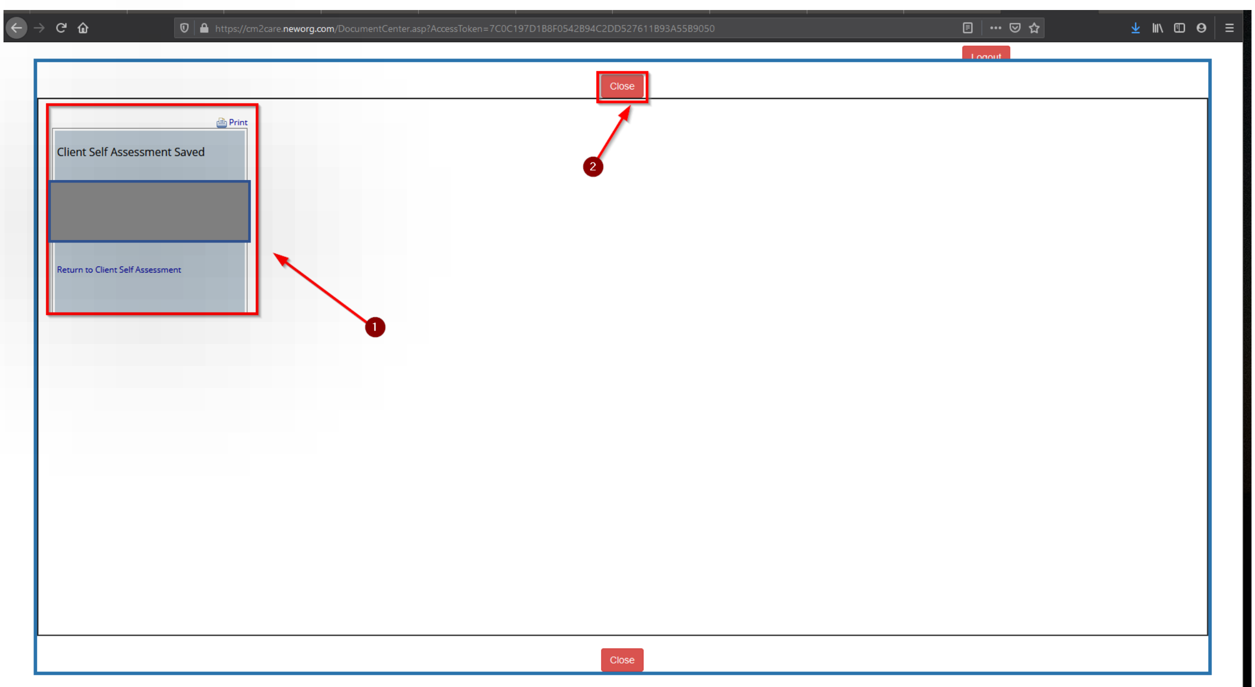
Requested Survey/Form Completion –



1) Click ‘Open’ to view the ‘File’ or Form
   Note: The instructions will be displayed below the ‘File/Form Name’.

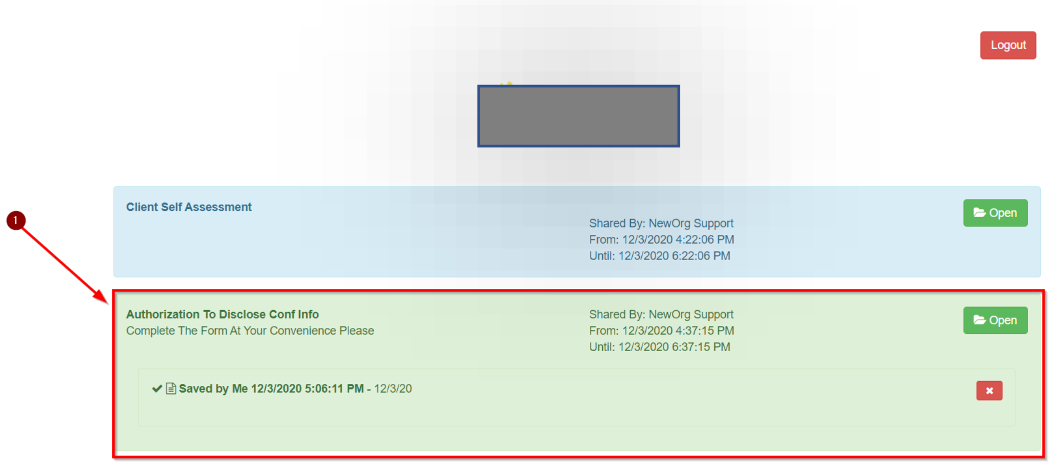


1) Answer the questions,
2) click 'Next' or the
3) 'Page Number' to the right.

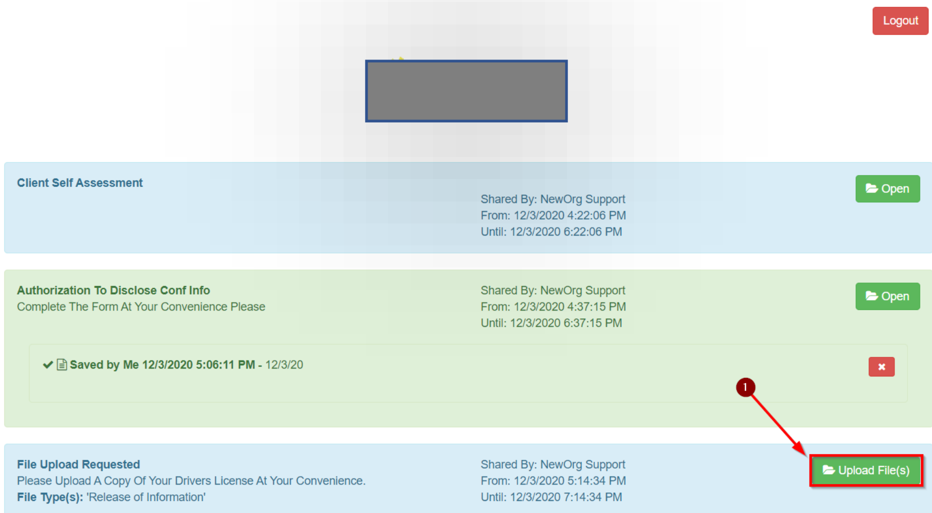


1) Once the form is completed, view the final details
2) Click ‘Close’ to return to the Document Center.

Note: The file will be displayed in Green when it is saved/completed.



Prompt for File Upload --



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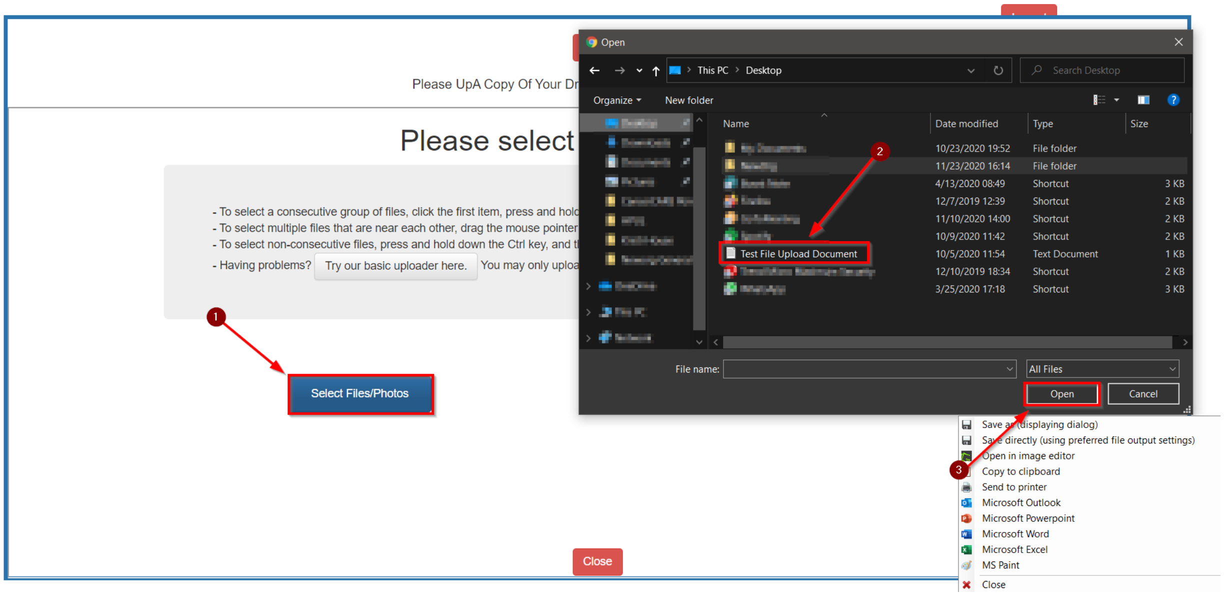
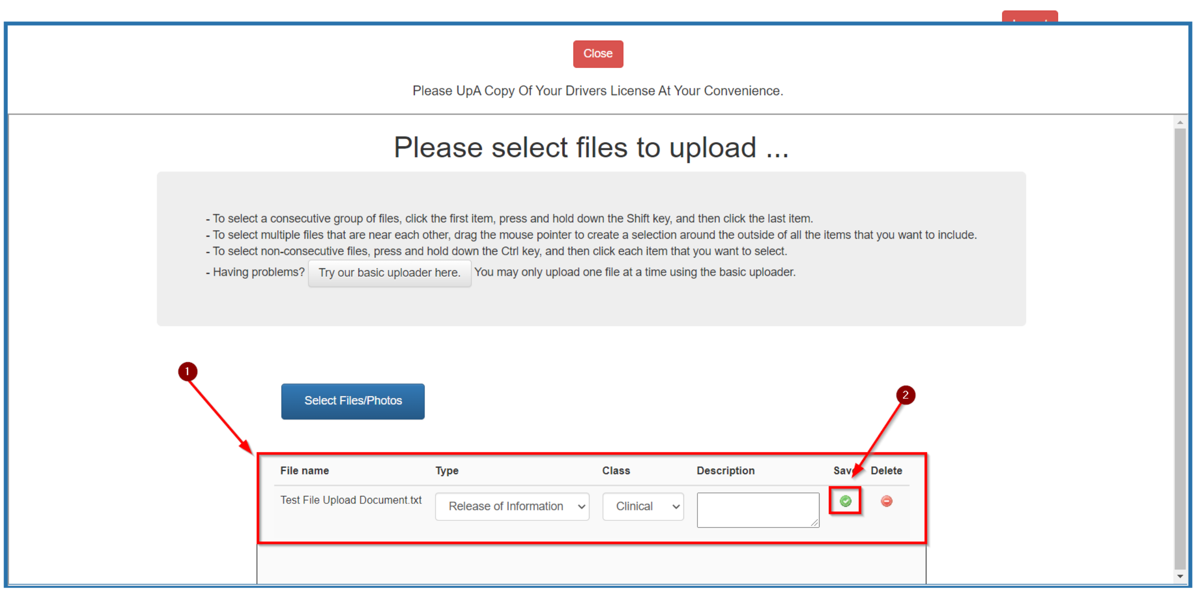
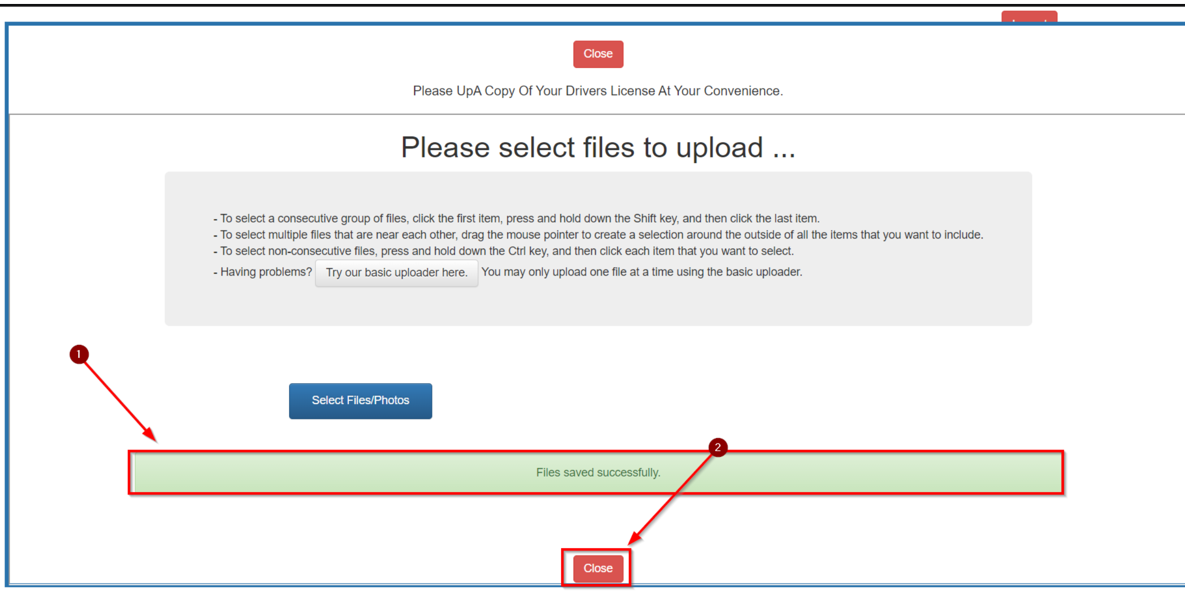
1) The Contact has been prompted to upload a File to their record.
   Note: The instructions will be displayed below the 'File/Form Name'.



1) Click ‘Select Files/Photos’
2) Select the File from their PC or Device
3) Click ‘Open’.



1) Note the ‘File Type’ and ‘File Class’ are preset based on the request from the File Sharing Display.
2) Click ‘Save’ when finalized.

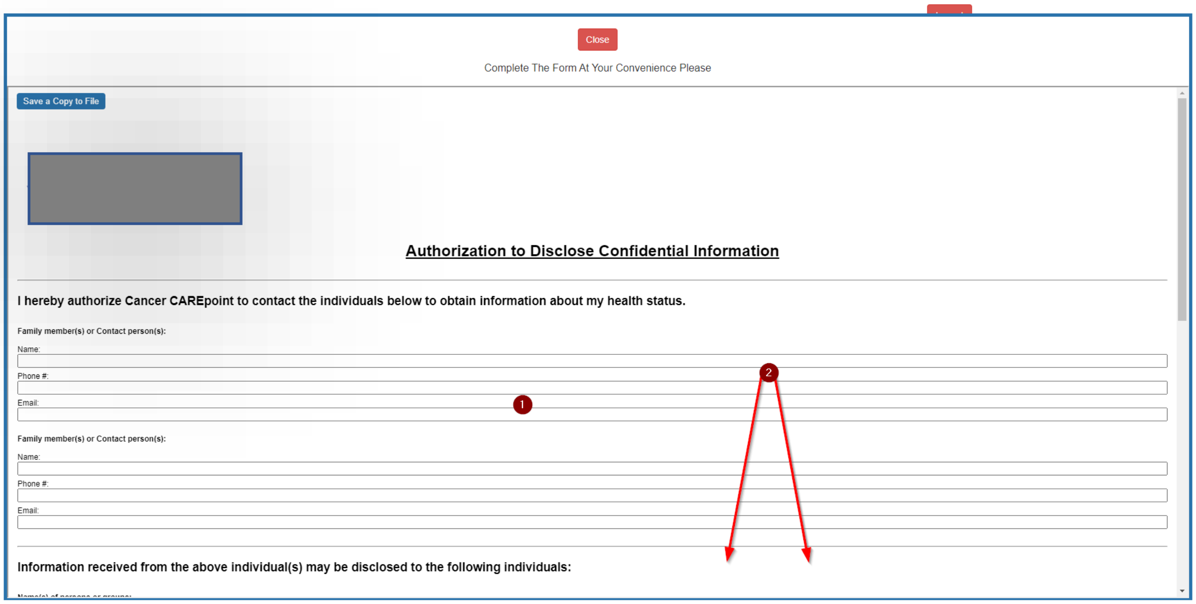


1) Note the File Was Uploaded successfully
2) Click the 'Close' button once finalized.

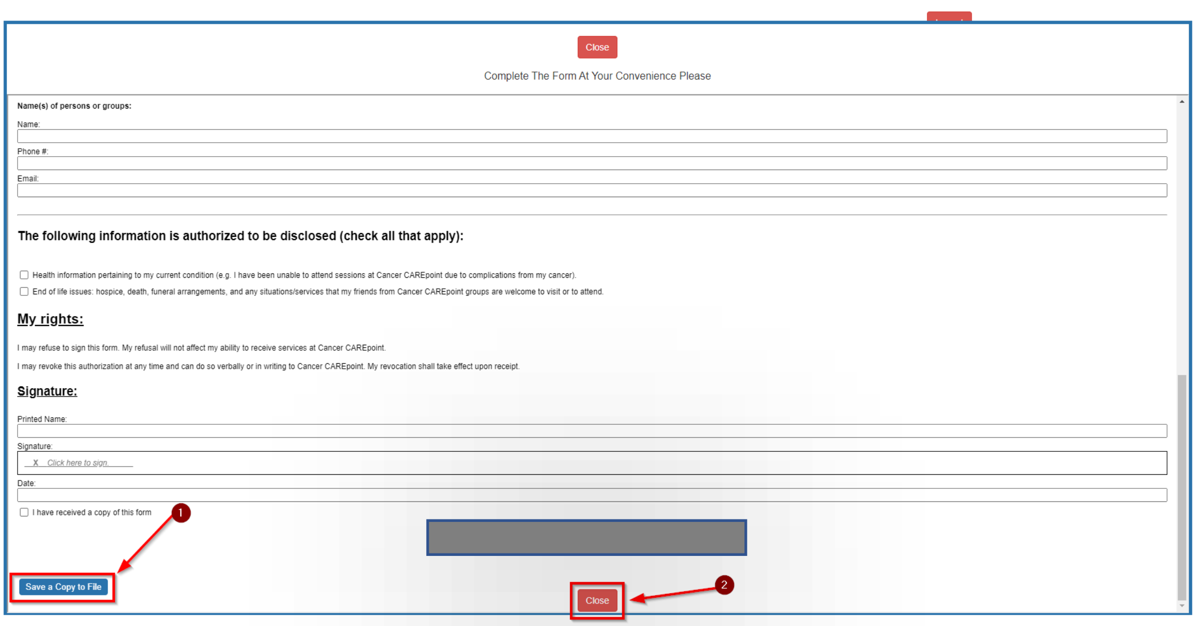
Print Forms –

1) The recipient will be requested to click 'Open' next to the file they wish to view/complete.

Note: The instructions will be displayed below the 'File/Form Name'.



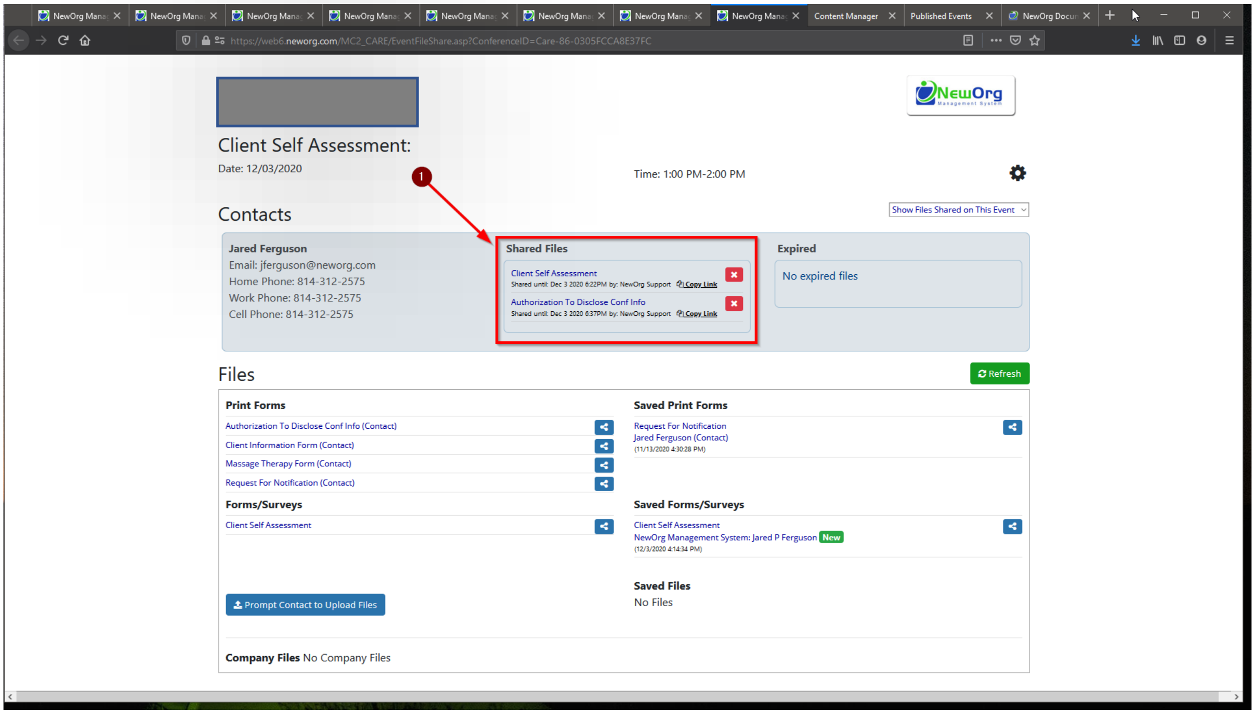
1) The recipient is requested to complete the documentation.
2) Scroll down the form.



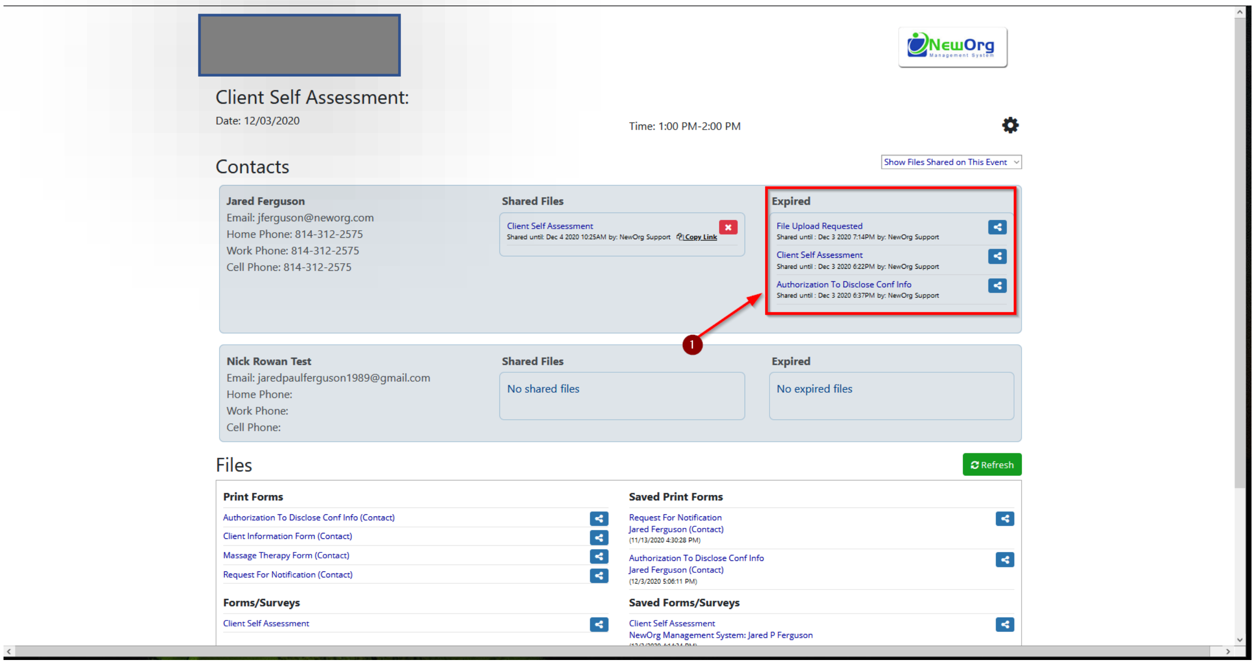
1) Once finalized with entry, click ‘Save a Copy to File’
2) Once Completed, click ‘Close’.

Viewing Previously Shared Files

Note: Previous Shared Files will be displayed in the 'Shared Files' area –

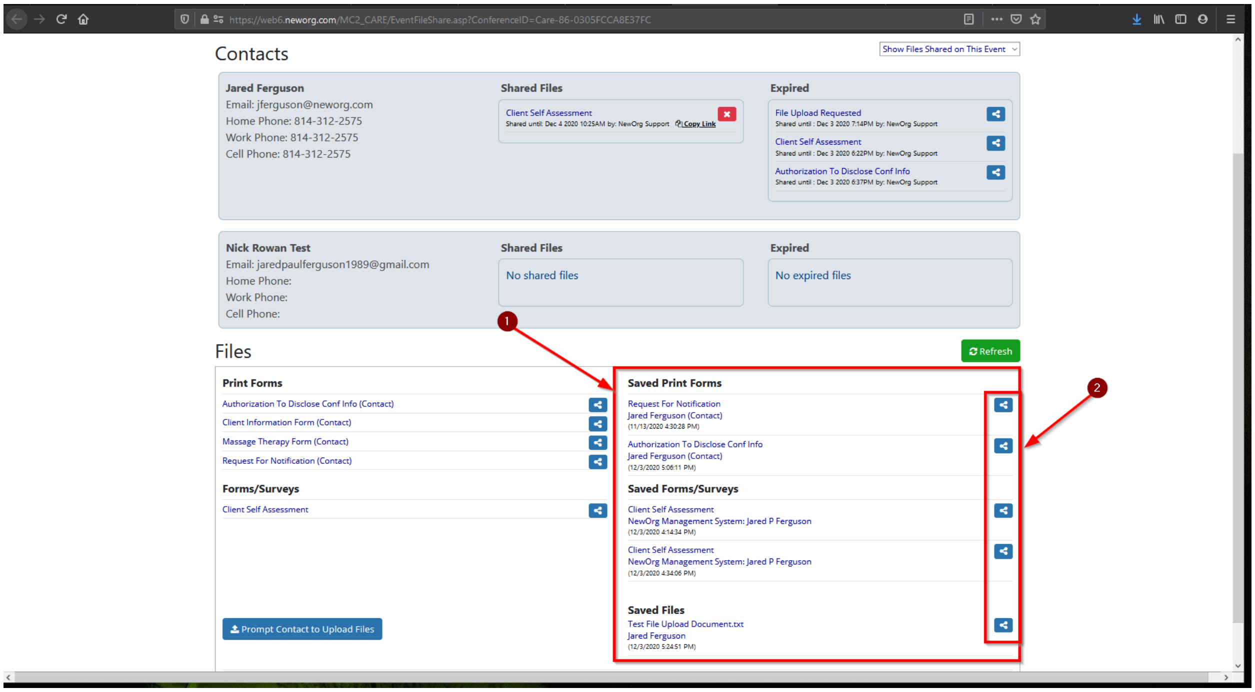


Viewing Expired Files



1) Files that have been shared and have expired based on the ‘Keep Available For’ will be displayed under ‘Expired’.

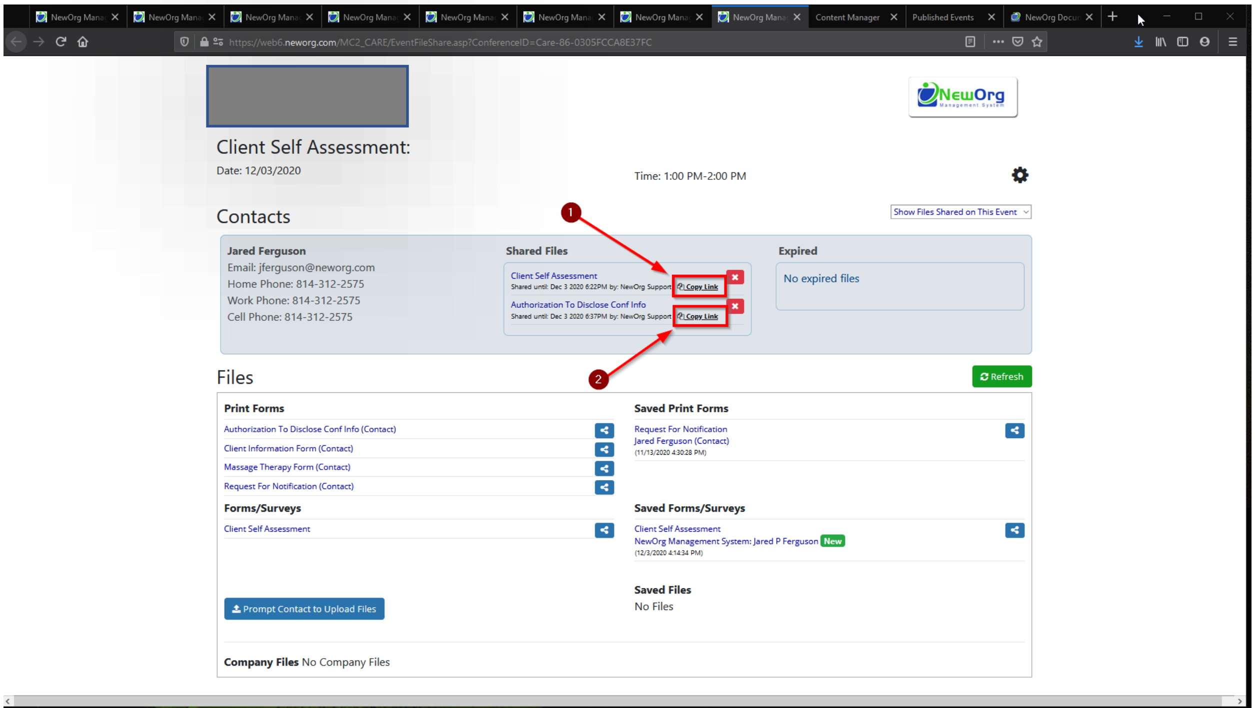
Resharing a Previously Saved File



1) In the ‘Saved Print Forms’, ‘Saved Forms/Surveys’, and ‘Saved Files’ area.
2) Click the ‘Share’ icon next to the file you wish to share again with the contact.

Copying The Link For a Previously Shared File

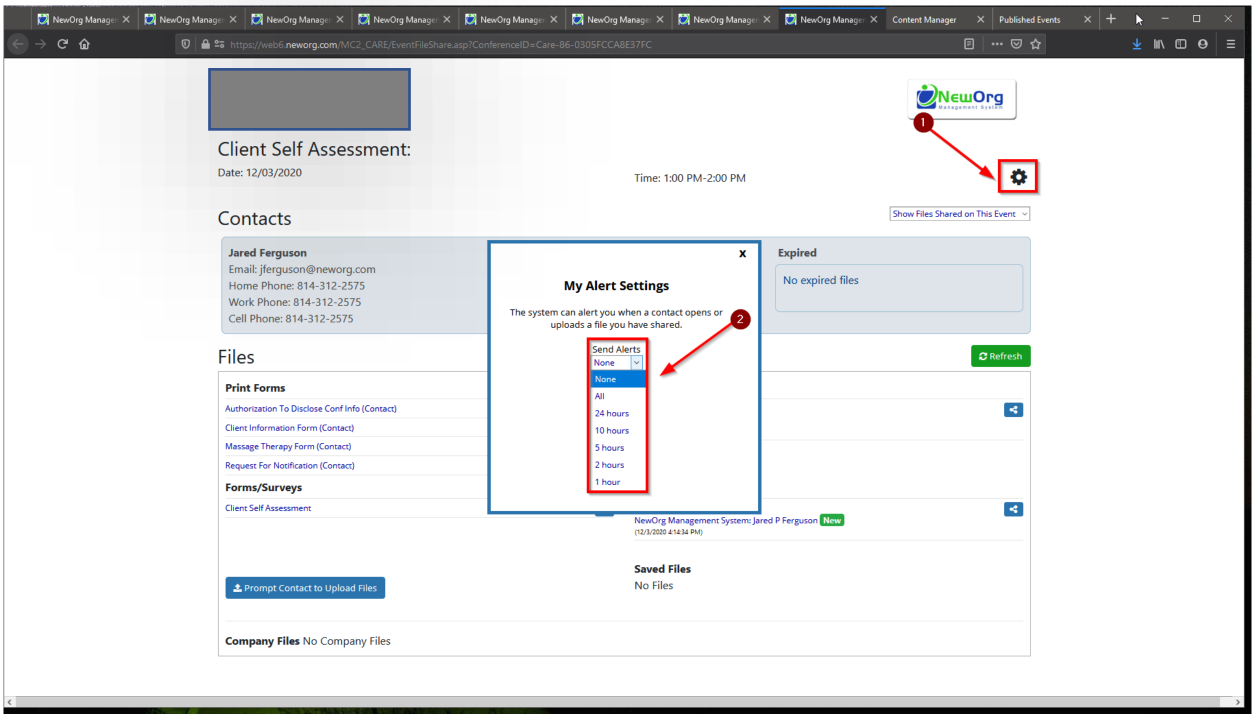
Note: If you choose to send the secure File Share via another communication Tool, you can click 'Copy Link' to paste it into whichever tool you wish to utilize.



1) Click 'Copy Link' and paste the link

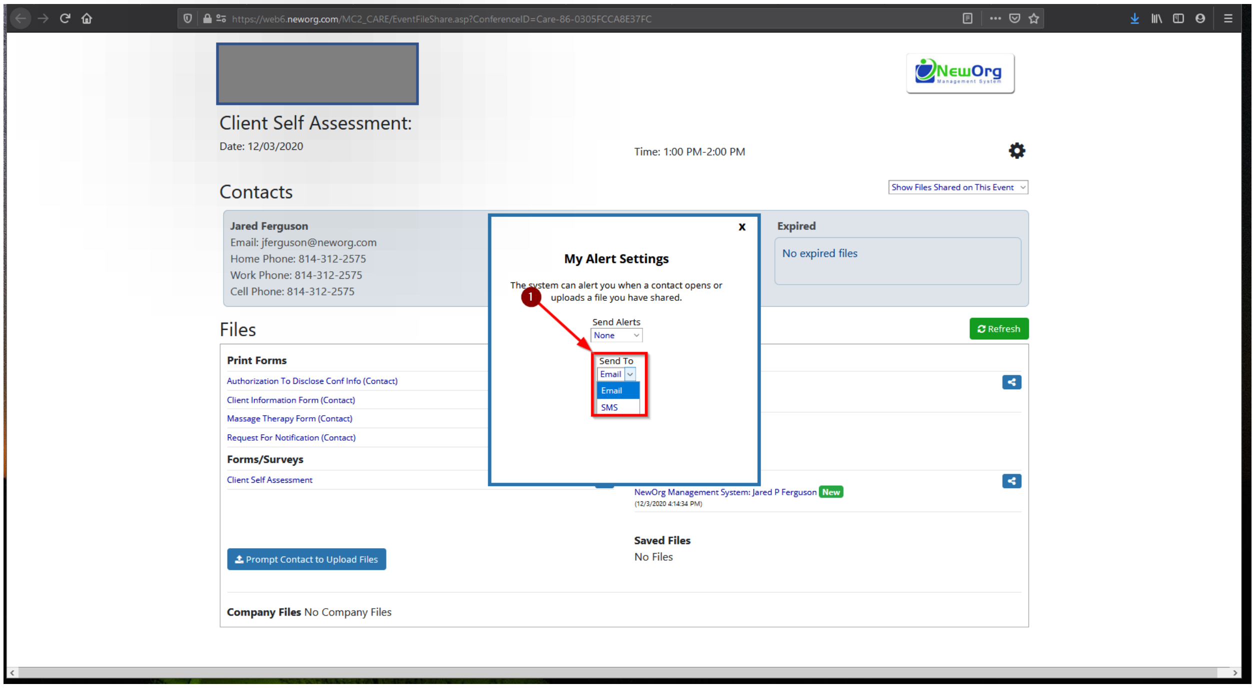
Specifying Your Alert Settings and Alert Notification Method

Note: Within the File Sharing display, you can specify if you wish to receive alerts based on contacts opening or uploading files in the Document Center.

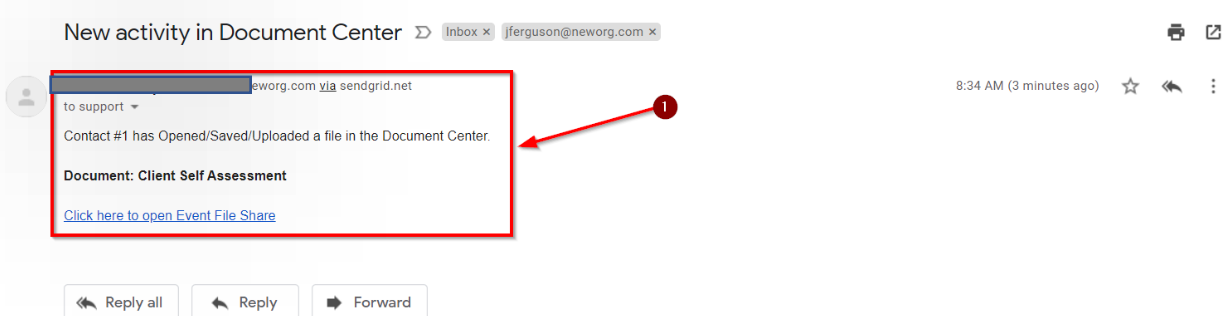


2) Click the 'Gear' icon on the top right of the display
3) Specify the timeline for which you wish to receive an alert, be it All, once per 24 hours, once per 10 hours, once per 5 hours etc.

Note: You can also specify whether your not you wish to receive these alerts via Email or SMS. Both contact details are located within the 'Staff' details.



1) Select either 'Email' or 'SMS' as your preferred alert communication method.



1) If choosing the 'Email' alert method, you will receive an email with the Contact # and information that a document has been opened/saved/uploaded in the Document Center. This email also includes a link to the open the Event File Share display.