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.

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.


2.1 Searching for a file

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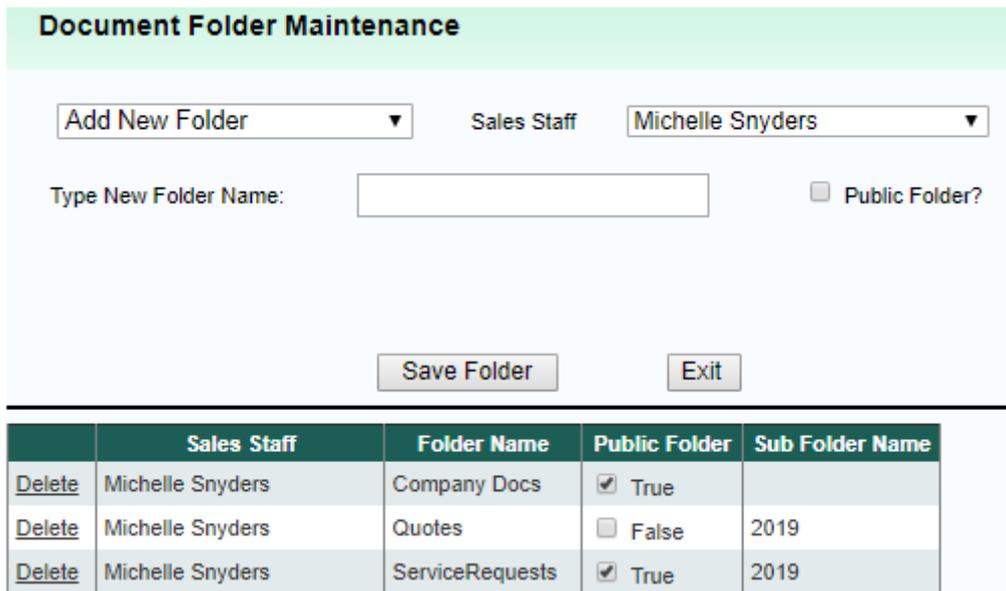
Once the user has found the file they were looking for, the user could either **Download**, **View** or **Delete** the file (depending on their user rights).

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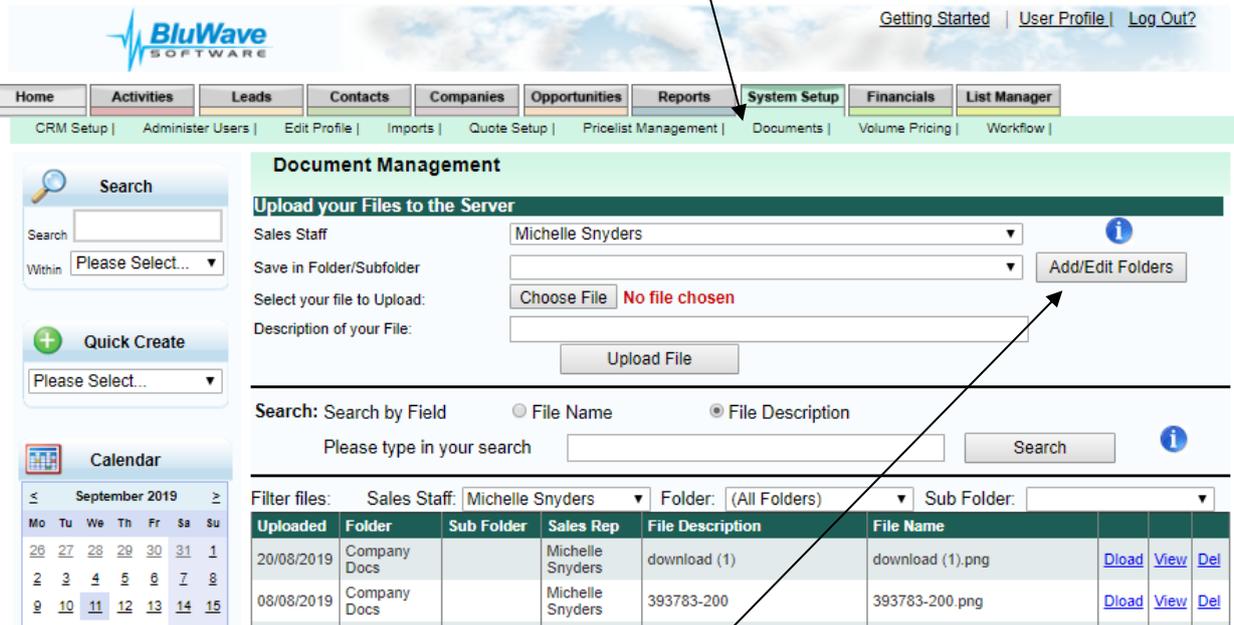
To add folders for users, click on the **Add/Edit Folders button**.

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.

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.

The user would then select the file on their computer and click on the **Open button** at the bottom of the screen.
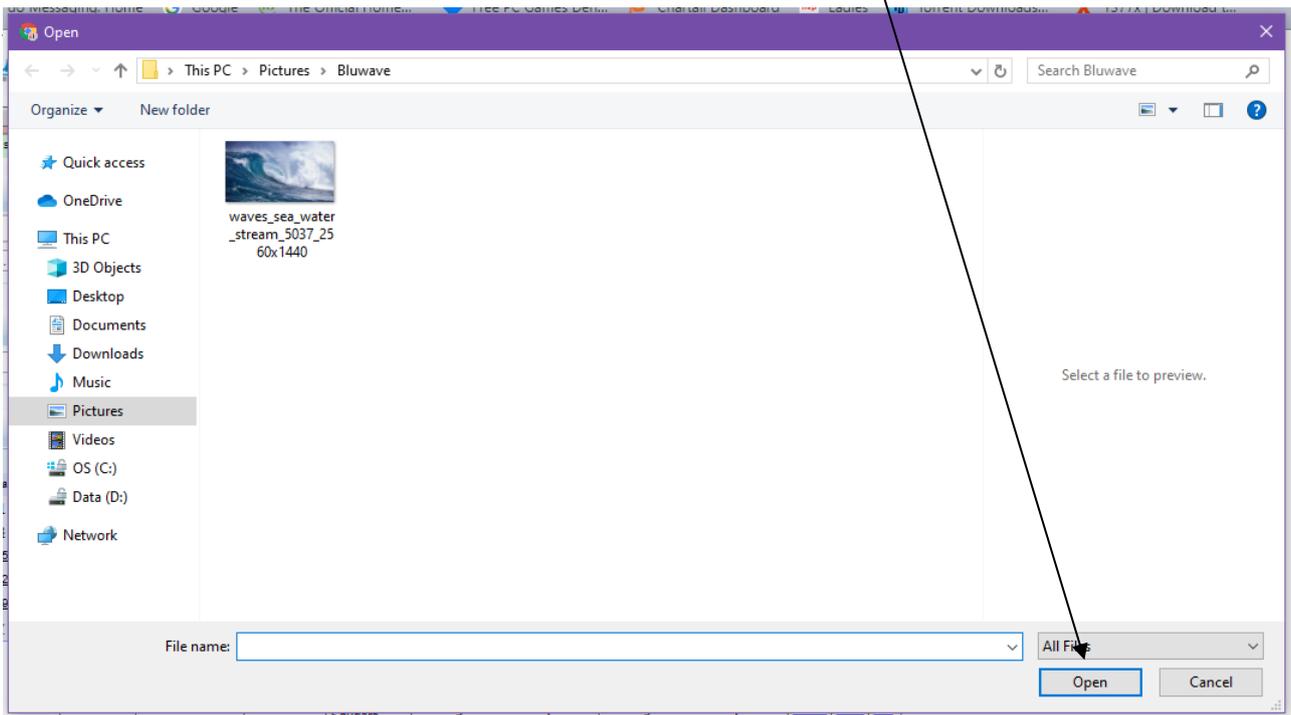
After clicking on the **Open button**, the name of the file will appear in the **Description field**.

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).

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.

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.

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.