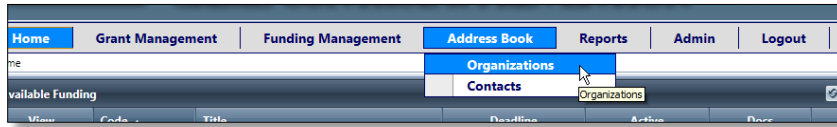


HOW TO ATTACH DOCUMENTS TO AN ORGANIZATION RECORD

Access the Organizations list by selecting Organizations from the Address Book menu:



Address Book -> Organizations

Expand and View an Organization Record

Locate your organization and click the expand icon to the left of the record.

>	Abell Foundation, Inc.	Non-Profit Non-Religious	Embry, Robert	(41)
>	Aberdeen Community Action Coalition	Non-Profit Non-Religious	Lucas, Jo	(41)
>	Aberdeen Police Department	Local Government	Trabert, Henry	(41)

Expand Organization Record

Expanded Organization Record – Documents Tab

Click on the Documents tab to view a list of all the documents associated with the selected organization.



Figure 1 - Organization Record - Documents Tab

The following columns are shown for each document associated with the organization:

- Document Name
- Created (Date the document was uploaded)
- Modified Date the document record was last modified)
- Modified By (Contact who last modified document record)

The following action columns are also displayed:

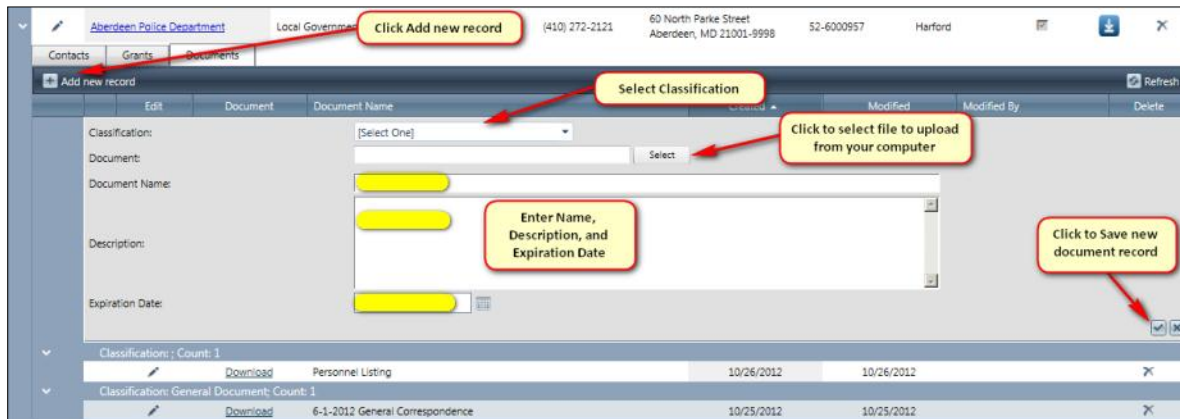
- **Edit:** Click on the pencil icon in this column to edit the document record.
- **Document:** Click on the Download link in this column to download a copy of the document.
- **Delete:** Click the checkmark in this column to delete the document if you have uploaded the incorrect item.

Delete
document

Document records display grouped by classification, which is a value you can assign to a document when adding or editing a document record.

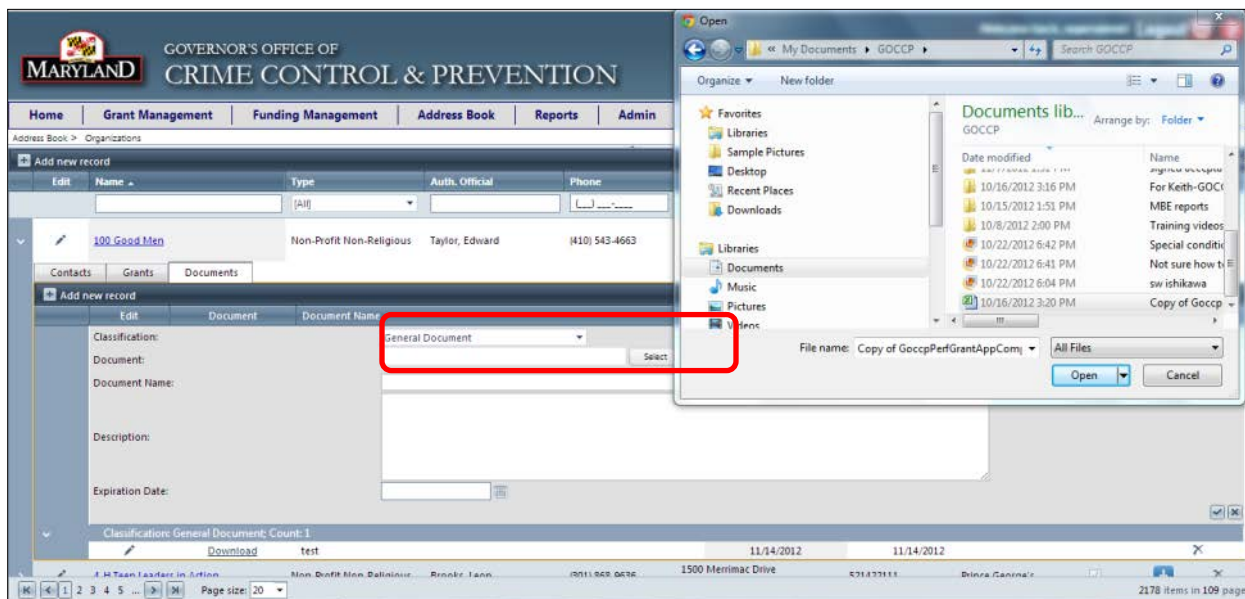
Add a Document to an Organization

Adding a document to an organization involves uploading a file and providing information about it.



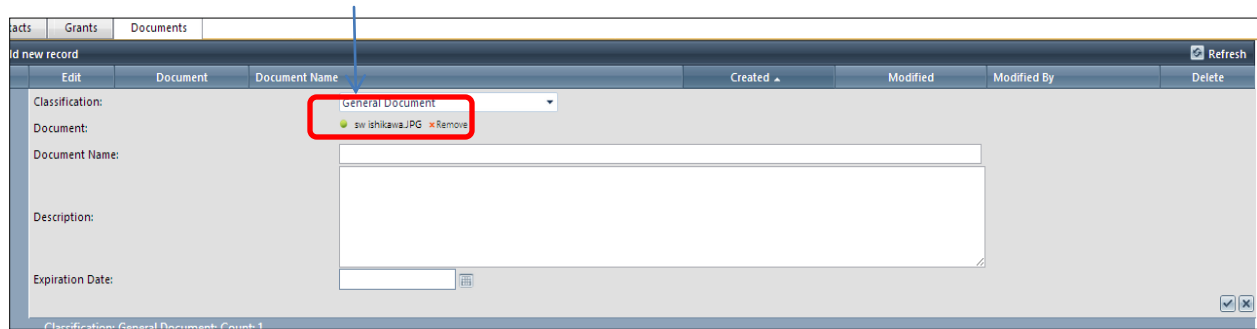
Add Document to Organization

1. Click on **Add New Record** at the top of the Documents tab.
2. Select a **Classification** for the document from the drop-down menu.
3. Click the **Select** button. This will display a standard dialog box, shown in the figure below in the upper right corner that allows you to select a file from your computer to upload.



Upload document file

4. If there is a green dot next to the file name of the file you just selected, you are ready to upload. If there is a red dot next to the file name, then the file cannot be successfully uploaded due to format or connection errors. If there is a yellow dot next to the file name it is still loading.



Document status indicators in uploading to the Documents section

5. Enter a descriptive name for the document. This will be the name of the document record and does not have to be the same name as the file you upload.
6. Enter a detailed **description** of the document into the Description field.
7. If applicable, enter a date into the **Expiration Date** field. This indicates the date after which the information in this document is no longer valid.
8. Click on the checkmark icon in the lower right hand corner to save the new document record.