# HOW TO UPLOAD DOCUMENTS IN SALES-I

Document Storage allows you to store documents within customer accounts in sales-i, making it incredibly easy to stay organized, share documents and collaborate with your colleagues.

Please note: Document Storage is a paid for extra add on for sales-i. Not set up with document storage? Click here
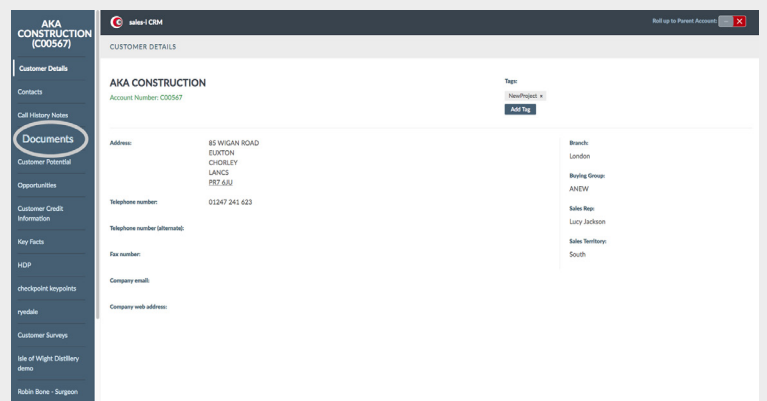
01 From the home screen, use the **Search** bar at the top of the page to search for the account you want to add a document to. Make sure to select contacts rather than accounts from the drop-down menu.
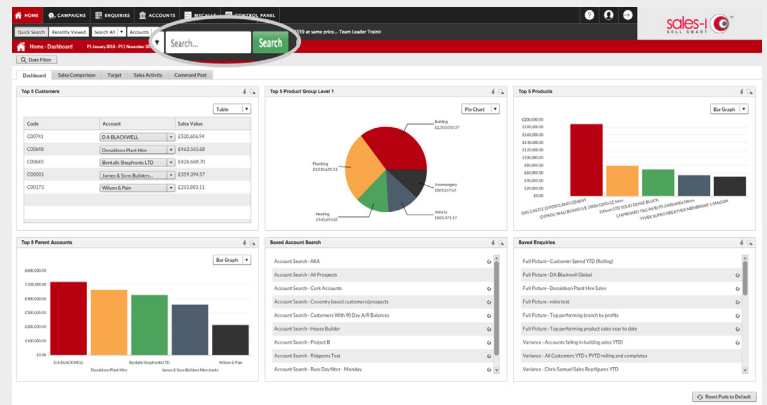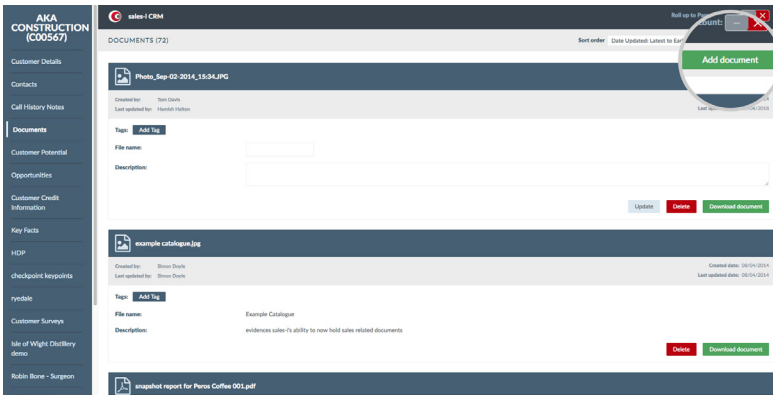
02 Select the desired account from the search results so that it turns green and click **CRM.**
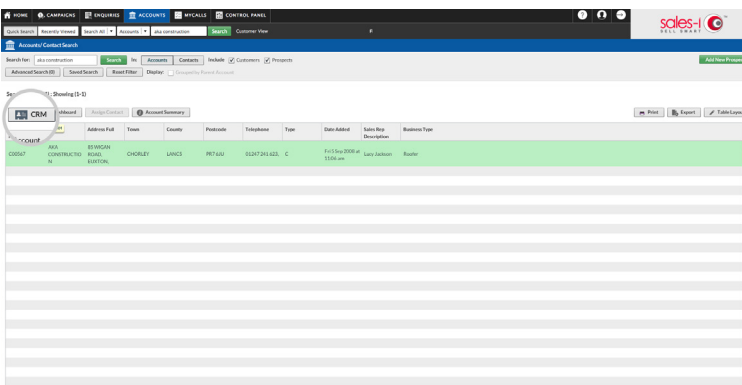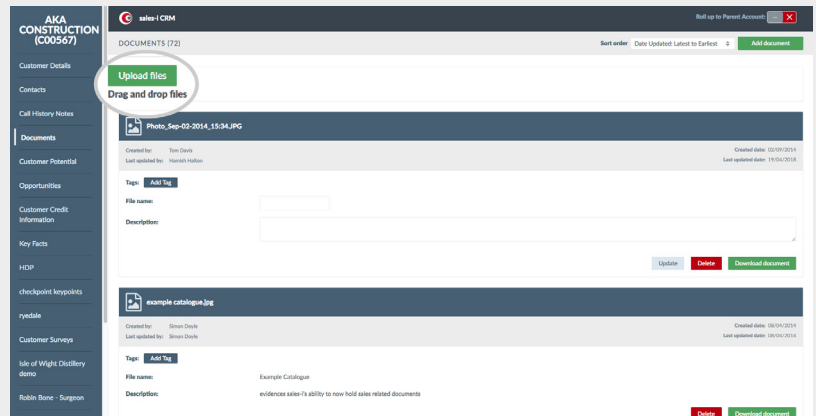
03 In the panel on the left, select **Documents.**

04 Click **Add document** in the top right of the screen.

05 Now, click **Upload files** and select which files you would like to upload.

VISIT OUR SUPPORT SITE

Don't forget to visit our support site online to view sales-i how to's, tips, tricks and best practices.

https://support.sales-i.com

HOW TO USE DOCUMENT STORAGE
ON YOUR iOS APPLE DEVICE

This how to guide will show you how to upload images from your device onto an account on sales-i .

Please note: Document Storage is an optional add-on feature. If you haven't got access to Document Storage you will need to contact our support team to enable this feature.

**01** From the home screen, tap the **Accounts** button.
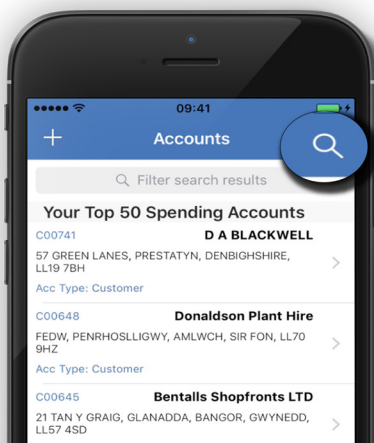
02 Your top 50 spending accounts will automatically be shown.

To find the account you wish to add an image to, click on the search facility accessed via the **magnifying glass symbol** in the top right.

03 Click on the **Search For** bar. This will open up a pop up menu, type in the name of the account you wish to add your image to and then press Apply.
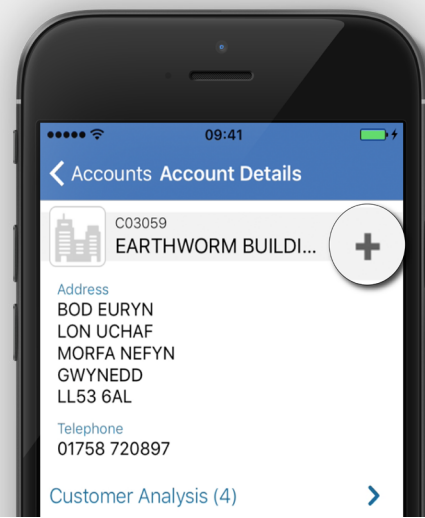
Once, the pop up screen has disappeared, click **Search** in the right hand corner.
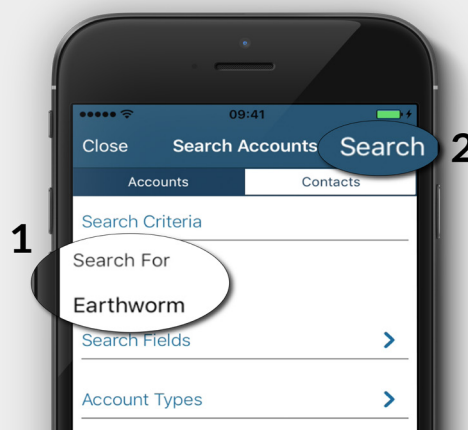
04 Tap on the correct Account.

05 Within the Account, you will now see a **+ symbol** - tap it.

06 A set of four options will now be available at the top of the screen.

The two icons right of center represent the options to upload an image: Tapping the image of the camera allows you to go straight to your device's camera and take a new picture; The second icon from the right allows you to go to your gallery and find a pre-taken image to upload. Select the icon which best suits your needs.

For this example, we'll run through as though we've already taken our image, so tap on the image of a picture.
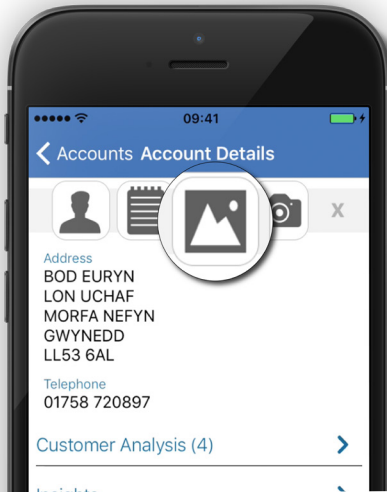
07 Find and select the image you're planning on uploading. Tap on it to upload it.

You will then see an alert on screen to say that the 'File was successfully uploaded to client name'.

You're all done! The document is now saved within sales-i for you to access anytime, anywhere.
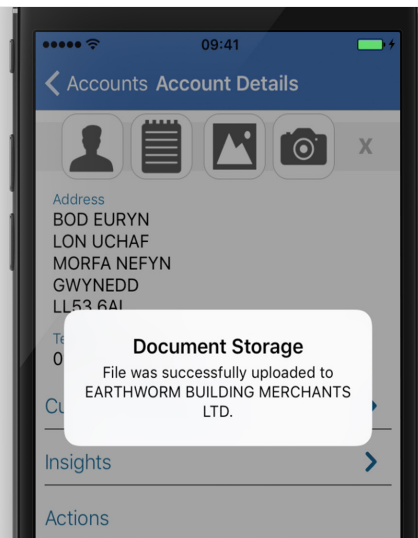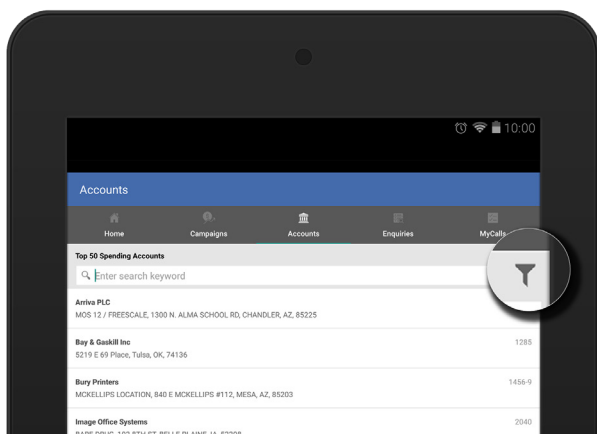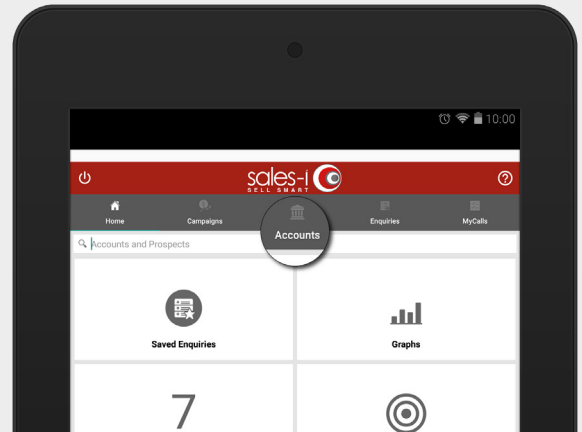
VISIT OUR SUPPORT SITE

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HOW TO USE DOCUMENT STORAGE ON ANDROID

This guide will show you how to upload documents from your Android device to an account. This document will then be viewable to anyone that views the account.

01 From the home screen, tap the **Accounts** button.

02 Before searching, tap the filter icon in the top right of the screen to choose your search settings.

03 A new Search Options window will open. Here, you need to select whether you want to include either your customers, prospects, or both, in your search results. You'll also need to select which fields you'll be searching for. Once you're happy with your search options tap **SAVE** in the top right of your screen.
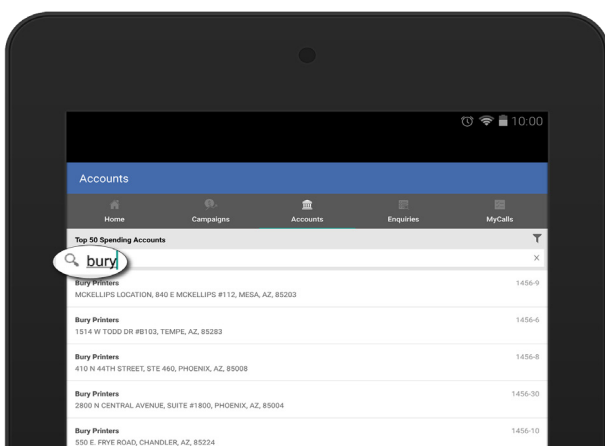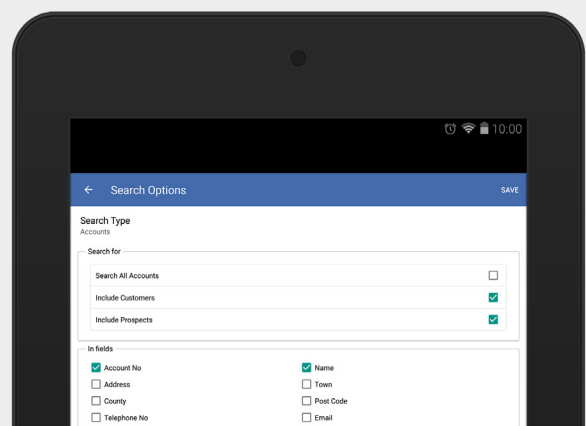
04 Now, using the search facility on the left of the screen, enter the details of the account which you want to upload a document to and press the magnifying glass on your keyboard to search. If there are various search results, simply scroll through them and tap the one you want.

05 Now in your customer's account, tap the **DOCUMENTS** option.

06 In the Documents area, you should see any documents you've previously uploaded, and, in the bottom right, an upload symbol; tap it.
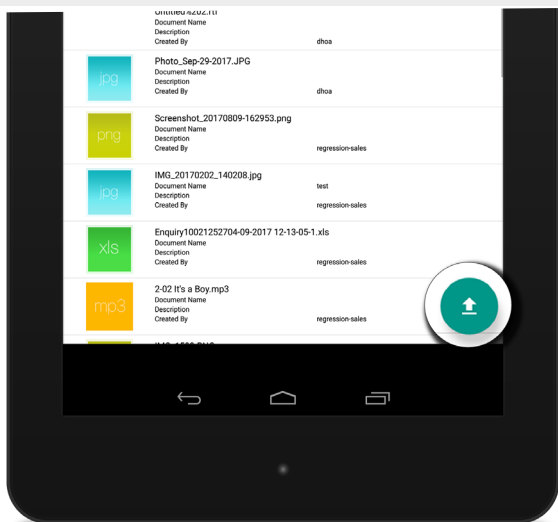
07 It's from here that you can browse for a file to upload by using the navigation menu on the left. Simply go through the documents saved to your device and tap the one you want to upload.
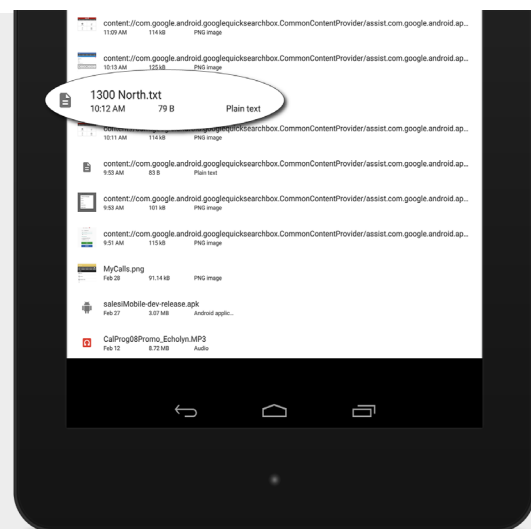
08 If the upload has been successful you will see a message telling you **Document Uploaded** at the bottom of the screen. The document will now be saved within the customer account.

This document can now be accessed from other devices and sales-i accounts.