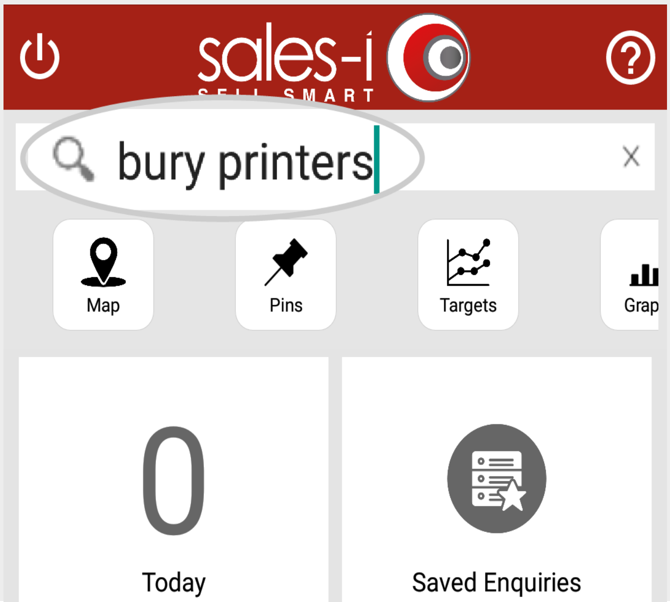
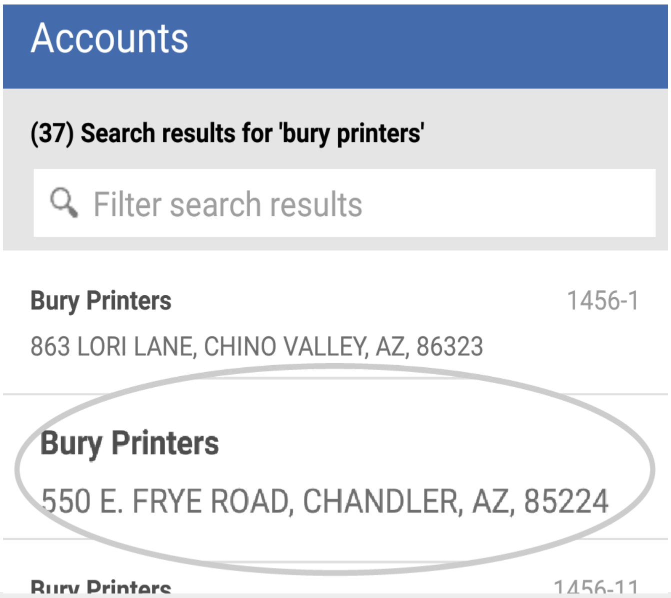
HOW TO UPLOAD DOCUMENTS - ANDROID

This guide will show you how to upload documents from your Android device to sales-i.
The uploaded document can then by viewed and accessed by anyone that views the account regardless of whatever device they log in to.
Please note: Document Storage is an optional paid for add-on feature. Contact our support team to enable this feature.

01 From the home screen, tap the **Accounts and Prospects search bar** and enter the details of the account you want to upload a document to.

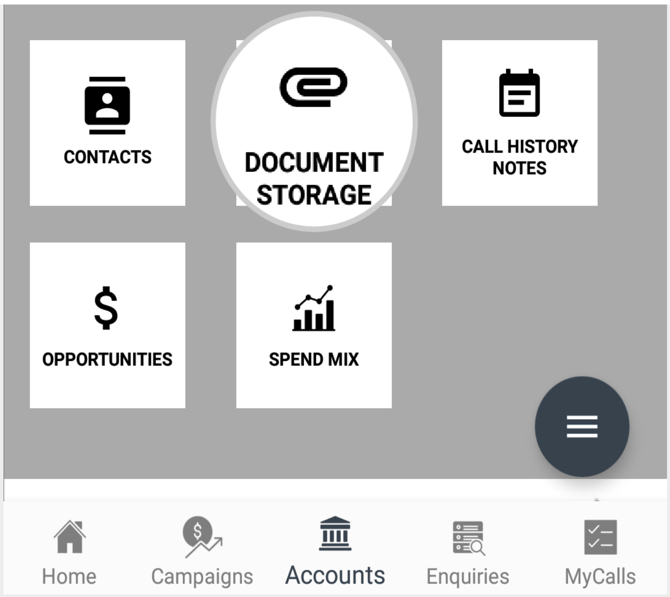
Tap the **magnifying glass icon** to search.

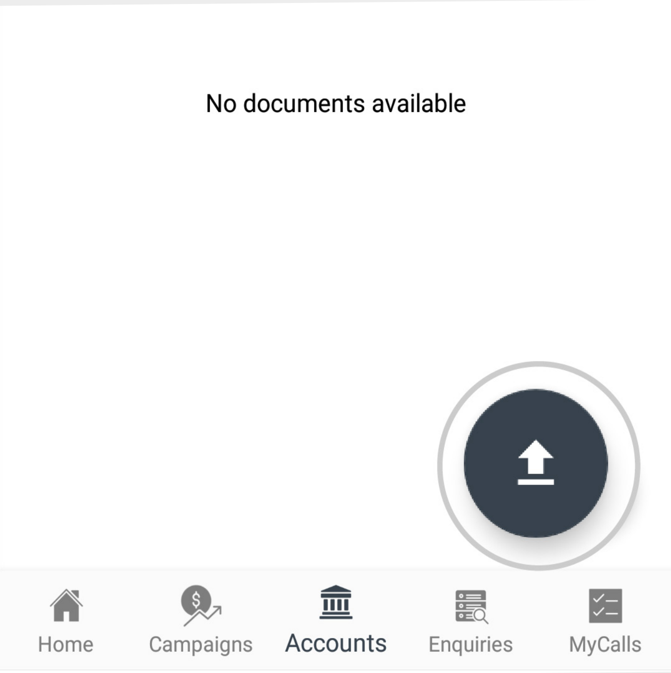




02 Tap the desired account from the search results list to view their Account Card.

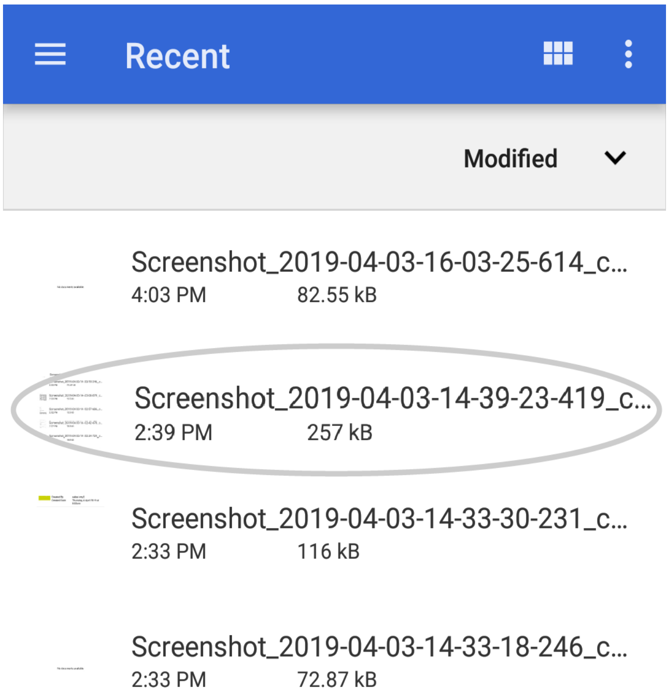
03 Now in your customer's account, scroll to and tap on the **Document Storage** option.

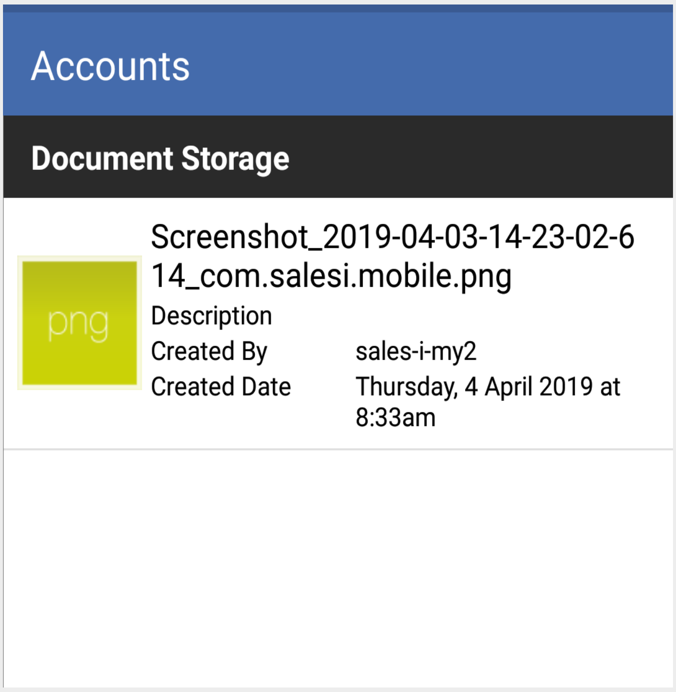




04 In the Document Storage window you will see any documents you have previously uploaded.
Tap the **upload button** toward the bottom left of the screen to upload a new document.
(The upload button has an arrow pointing upwards on it.)

05 Now you can use this navigation menu to go through the documents saved to your device and tap the document you would like to upload.





06 You will see a message telling you that the document is uploaded, and then another message telling you when the upload has been finished. The document will now be saved to the customer account.

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