

Overview

This document explains two methods of bringing documents into Publishing to then upload to an owner portal.

Method 1

Documents that need to be uploaded for Owners, Tenants and Vendors can be created and placed in a folder and then "Imported" into the Document Upload folder at one time if they are named per the following format.

Type.ID.Actual ID.Filename.Extension

where

type = the word owner, tenant, unit, property

ID = the letters ID

Actual ID = the short ID of the profile

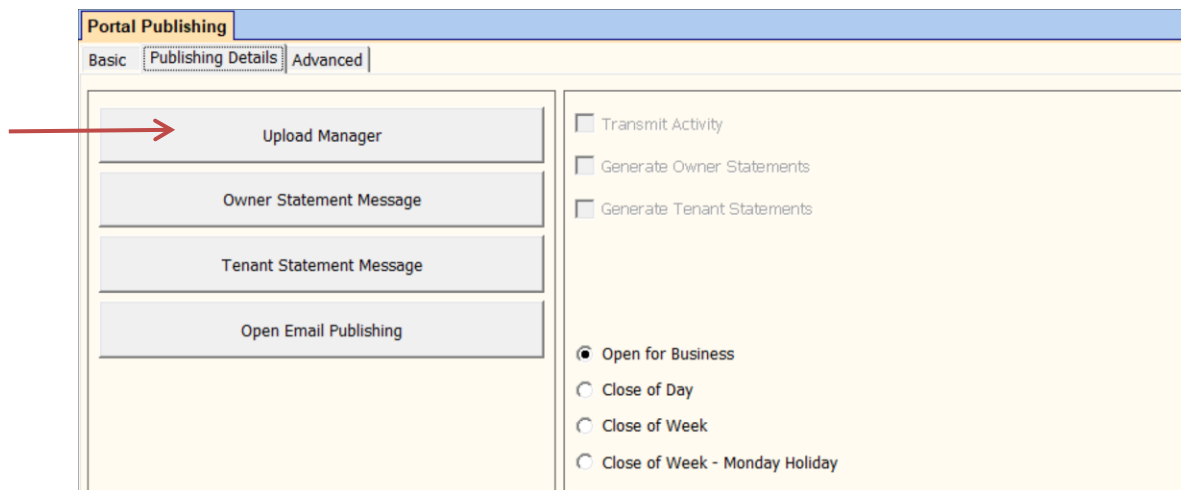
Filename = freeform

Extension = document type, e.g. jpg, doc, xls, pdf

Examples:

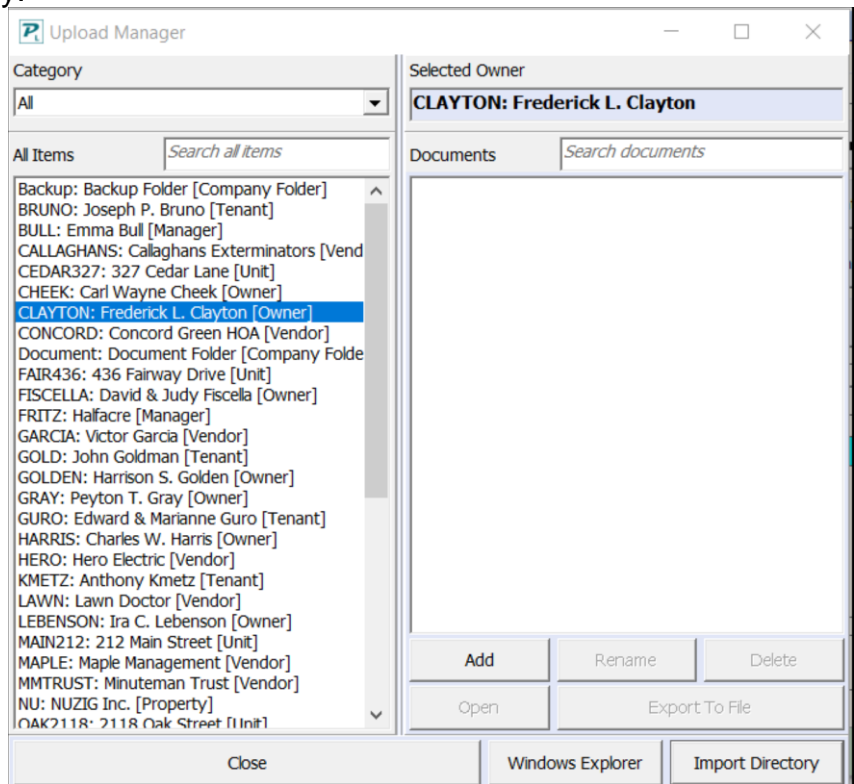
- Owner.ID.Golden.Management Agreement 2-20-2018.doc
- Unit.ID.Fair436.Inspection Condition Report.pdf
- Unit.ID.Main212.Carpet Stains photo.jpg

To copy the files into the Upload folder, go into any profile and click the Upload Manager button or go into Publishing and click the Upload Manager button on the Publishing Details tab.

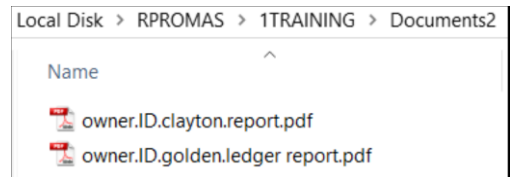


If you are publishing to Inosio, the documents will be in the Data\LL12_Database\LL12_Publish folder. If you are using a legacy method they will be in the Data\LL12_Database\LL12_Legacy folder.

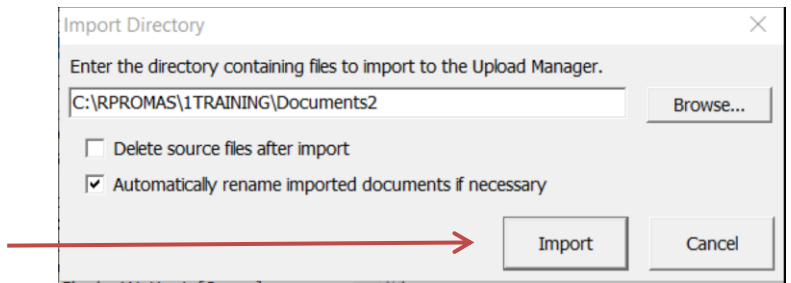
Click Import Directory.



Select the directory (folder) containing the files you wish to bring in.

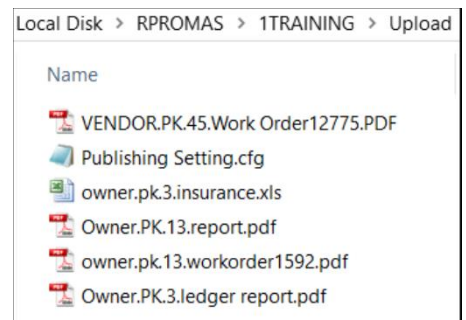


Click Import.



The files will be copied into the Upload folder. The filename will change to:

Type.PK.xxxx.filename.extension
where xxxx is the PROMAS Central Entity #
for that owner/tenant/unit

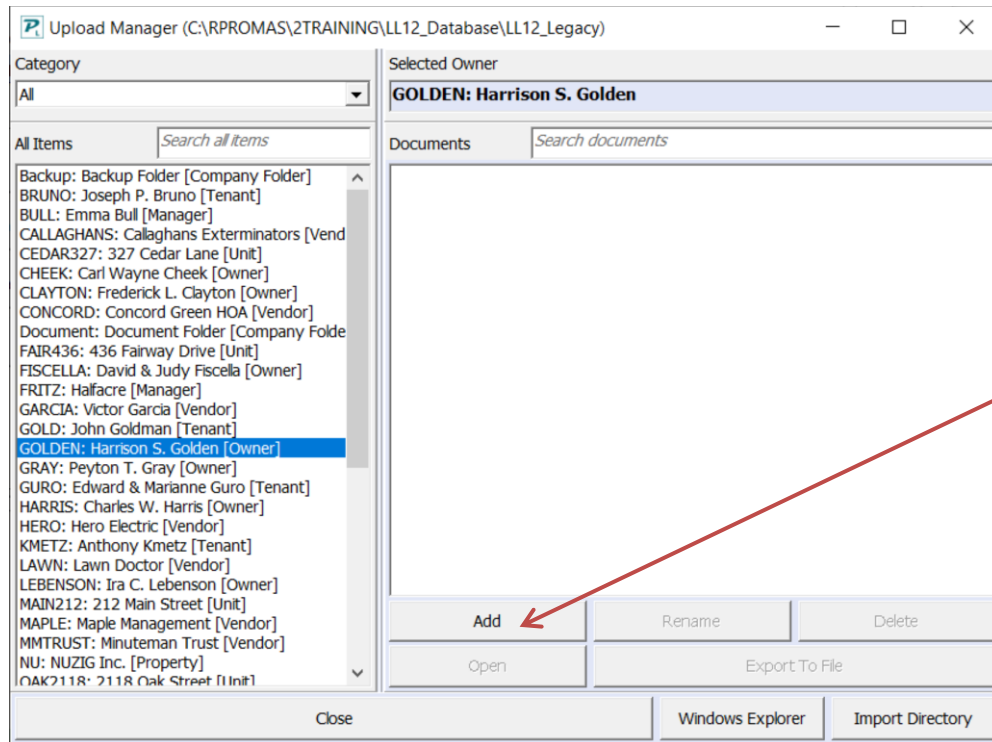


You can delete them from the original location if you choose.

Method 2

To upload individual files not named as above for a specific owner

1. Go into the Upload Manager in the owner profile or in Internet Publishing, Publishing Details tab. Be sure the owner is highlighted.
2. Click on the Add button.



3. Use the Windows Browse screen to find the folder containing the files - double click to open it.
4. You can choose one or highlight several files that you want to upload for that particular owner.
5. Click Open - those files will be renamed as above and brought into the Upload folder.

