

Overview

Owner, Property, Unit, Tenant, Vendor and Management Group profiles have a **Documentation** tab that lets you attach files to the profile. When attached, the file is copied into the Documents folder in the database folder (typically R\PROMAS\Data\Documents).

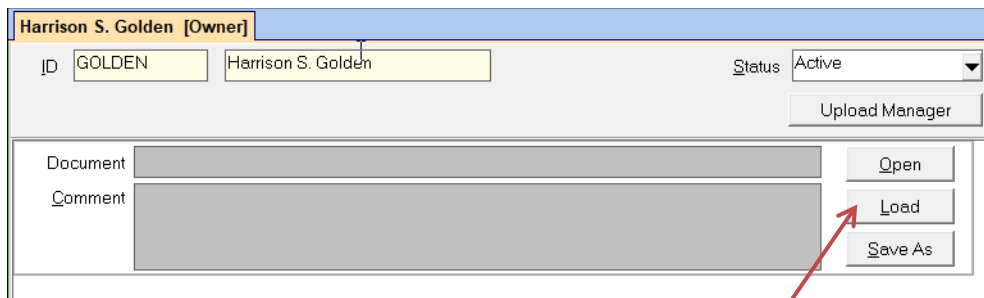
The Documents folder is not part of the automatic backup. You must back that folder up independently of the automatic backup.

This function is handy for easy access to the lease, digital and scanned pictures, work processing documents, pdf documents, and the management contract.

Although any file can be attached, the only ones that can be opened are those that your Windows operating system or other application programs will open.

Each item attached has a Document Name which is the file name assigned by the operating system. A comments field provides for an explanation of the document contents.

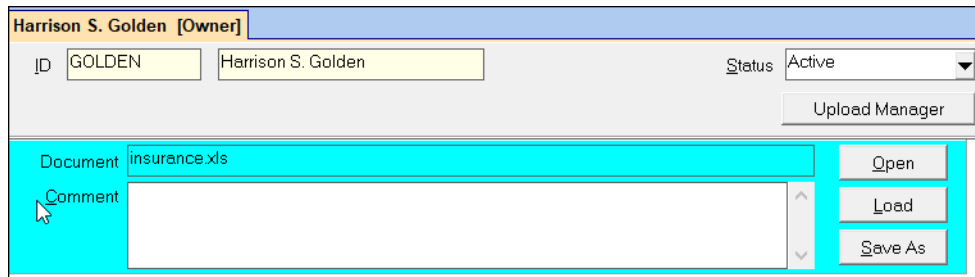
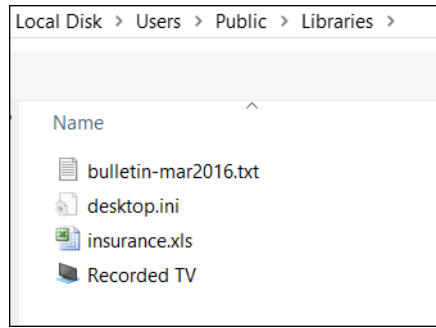
The document name has a limit of 40 characters, including the file extension. If the file name is longer than 40 characters, it may appear to save but will not be able to be opened.



The screenshot shows a software window titled "Harrison S. Golden [Owner]". It contains several input fields: "ID" with the value "GOLDEN", a name field with "Harrison S. Golden", and a "Status" dropdown menu set to "Active". Below these is an "Upload Manager" button. A table-like structure has two rows: "Document" and "Comment", both with empty text boxes. To the right of these text boxes are three buttons: "Open", "Load", and "Save As". A red arrow points from the "Load" button down towards the text below the screenshot.

To select a document, click on the <Load> button to find the file.

The Windows Browse screen will display and you can go to the folder containing the file. Only one file can be selected at a time. Double clicking on the file you want will fill in the document name field and copy the file to the Documents folder.



To view the file, click the Open button. Additional files can be attached by clicking in the open area below the last line item.

To delete an attached file, click in the document field and do a <Ctrl><Delete>. Click <OK> to the message. The physical file is not deleted from the documents folder, just from the Documents page of the profile.