How to Add a Document

- Log in
- Select client from the client list

Client Details

| Details | Edit | Billing | Notes | Documents | Tasks | Delete |

Jane Doe   Client Status Accepted

DOB 1 Jan 2000   **Referral Source** GP, Primary Care
Primary Provider Rose Garden   ▶ **More Information**

- Click on the documents tab

Client Documents

| Details | Edit | Billing | Notes | Documents | Tasks | Delete |

Jane Doe   Client Status Accepted

Documents

No results found.

Add a new document

- Type the title of the document in the Document Group Name box

Add a Document to Doe, Jane

Document Group Name *

Early Planning PO

▼ Documents

To upload multiple files at the same time hold down your CTRL key and click on multiple files from your computer.

Show row weights

File information	Operations
✛ 📄 Adding a Document to a Client File.docx	Remove

Description

The description may be used as the label of the link to the file.

Add a new file

Choose Files No file chosen

Unlimited number of files can be uploaded to this field.
100 MB limit.
Allowed types: txt csv pdf xls xlsx doc docx ppt pptx rtf png jpeg jpg zip xlm xlsm xltx xlt xltm gif.

Status	Last saved Not saved yet
Revision information No revision	Author admin.Kathryn
Authoring information By admin.Kathryn (6) on 2020-11-08	

- Click on the Choose Files to browse your computer for the target document

- Select the target document and the document will auto upload
- Click SAVE

About text formats

Text format

Basic HTML

Save
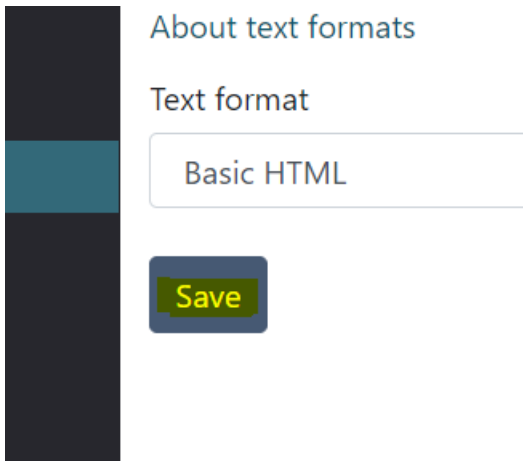
- The system supports the uploading of documents with the following suffixes (file types) *txt csv pdf xls xlsx doc docx ppt pptx rtf gif.*