

## To Upload a File to a Contact Record:

- Open a contact record.
- Select the Letters/Documents tab.
- In the **Document Summary** section, click the **Add** button.
- Enter the name of the file in the Description field.
- In the **Document Type** section, select the first option.

Note: The first option makes a copy of the file and uploads it into SmartOffice. Keep in mind that this option will increase the size of your database. The second option creates a direct link to any file stored on your local system such as your desktop, My Documents folder, or a network drive. Documents stored in this capacity will not be available when SmartOffice is accessed from a different location. The third option creates a link to a URL, which saves a link to a document or web page stored on the Internet or Intranet.

• Click OK.

SmartOffice Webpage Dialog	×
Document Detail	
Contact Name Joseph Ackerman	
Description	
Category 🔍 🔍	
Keyword 📃	
Share this document with the SmartView for Clients user.	
Document Type	
<ul> <li>Upload the document to the server and specify where the document is stored locally.</li> </ul>	
Local File Path Browse	
<ul> <li>Link with a document on the local file system and specify where the document is stored locally.</li> </ul>	
Local File Path Browse	
Save a link to an Internet/Intranet document and specify the URL (the document will remain on the internet/intranet).	
OK Cancel	
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Figure 1: The Document Detail window

