



### 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**.

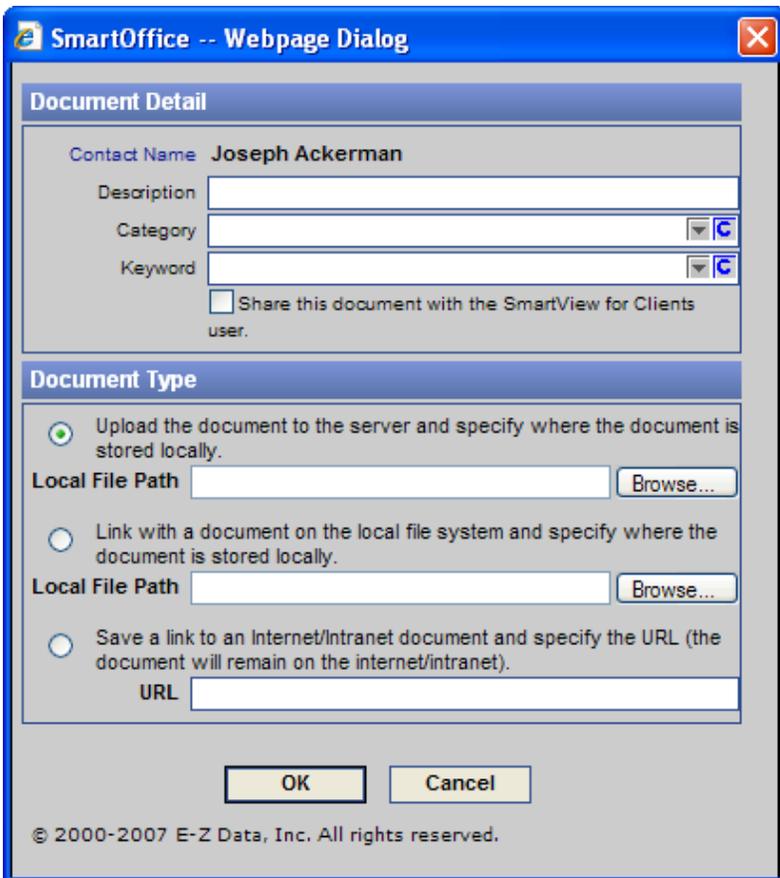


Figure 1: The Document Detail window