## eGO Academy



## Software

## **How to Upload Documents**

The application manager has the possibility to upload documents to the eGO platform.

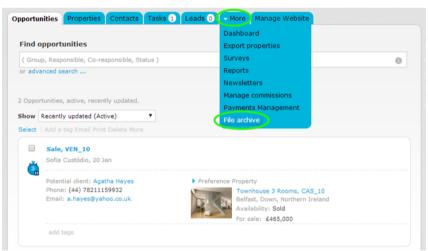
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The eGO Real Estate platform allows the user to upload files from your computer and view them anytime, anywhere.

The user can also add files and associate them to a property or contact, in the property, opportunity or contact record. These files can be classified for a better organization, by creating folders for your files.

To do so, take the following steps:

1. Access the 'More' tab and open the 'File Archive';



2. To create a new folder or delete an existing one, click 'Manage folders';



**3.** After opening the folder management window, click **'Add category'** to create a new folder;

a Edit category	$\otimes$
C Add category	edit 📣
C Add category	Save

4. Type the new folder name and then click 'Save';

le a anag	Edit category	$\otimes$	
C C	Docs     administration documents	edit 🖉	
G		Save	

 For the created folder to be available in your archive, you must check the box related to that folder and click the 'Save' button;

Opportunit	ties Properties Contacts Tasks 1 Leads 0 More Manage Webs	site
File a Manag	Edit category	*
	administration documents	edit 🗶
@Gi Real Est	Add category	Save

**6.** To upload a file, click the '**upload**' button located next to the name of the desired folder and select the file to be added to that folder;

ile archive			
lanage folders			
Docs (0)	Upload		
administrat	ion documents (0) Upload		
Other files	(0) Upload		

7. When the upload is complete, you just need to click the file to download and view

File archive		
Manage folders		
Docs (0) Upload		
administration documents	(2) Upload	
i. 💼 login.png		
pagina2.pdf		
Other files (0) Upload		

## Associate files to a property, contact or opportunity

To upload a file and associate it to a contact, a property or an opportunity, take the following steps:

8. Access the desired tab, 'Properties', 'Opportunities' or 'Contacts';

( Gro	up, Responsible, Co-responsible, Status )				0
or adv	anced search				
2 Oppo	rtunities, active, recently updated.				
Show	Recently updated (Active)				
Select	Add a tag Email Print Delete More				
	Sale, VEN_10				
	Sofia Custódio, 20 Jan				
Č	Sofia Custódio, 20 Jan	Profer	ance Proper		
e Č	Sofia Custódio, 20 Jan	Prefer	ence Proper	rty nhouse 3 Rooms, CAS_10	
Ċ	Sofia Custódio, 20 Jan Potential client: Agatha Hayes	Prefer	Town Belfa		

**9.** Open the record of the property, contact or opportunity;

C Sale, VEN_10	Won Lost Low High
Sofia Custódio, chancer in 20 January 2014	edit this opportun
otential client: Agatha Hayes	Preference Property
hone: (44) 78211159932	Turnhaman 2 Darama CAE 10
mail: a.hayes@yahoo.co.uk	Townhouse 3 Rooms, CAS_10 remove @ Belfast, Down, Northern Ireland
rigin: Brochure	Availability:Sold
ub origin: Brochure August	For sale: £465,000
edit • Adding note about	
<ul> <li>Adding note about</li> </ul>	
	Add note
<ul> <li>Adding note about</li> </ul>	Add note Search

**10.** With the record open, at the bottom of the page, click **'edit'** on the **'Related files'** section;

Attach file	85				🔺 1 7 🔛	Add note
All Notes	Users Notes	System Notes	Logs			Search
			No	records to show.		
Timelines				edit 🔍 Related files		ed
				Other files (0		Upload

**11.** Choose the folders that you want to make available in the **'Related files'** and click **'Save'**;

ed
edit 🖉 iload
edit 🖉
load
Save

12. Click 'Upload' and choose the file related to the record;

Attach files		🌲 1 7 🎫	Add note
All Notes Users Notes System Notes Logs			Search
	No record:	to show.	
add tags			
Timelines	edit	▼ Related files	e
		Docs (0)	Upload
		administration documents (1)	Upload
		software1.png	$\sim$
		Other files (0)	Upload

**13.** Finally, the uploaded file will be available for download and viewing.

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W Attach	files			1 7	Add note
All Notes	Users Notes	System Notes	Logs		Searc
			No reco	ords to show.	
add tags					
Timeline:	;		edit	▼ Related files	
				Docs (0)	Uploa
				administration documents (1)	Uploa
				software1.png	
				Other files (0)	

Learn more at: <u>http://academy.egorealestate.com</u>

**Questions:** <u>support@egorealestate.com</u>