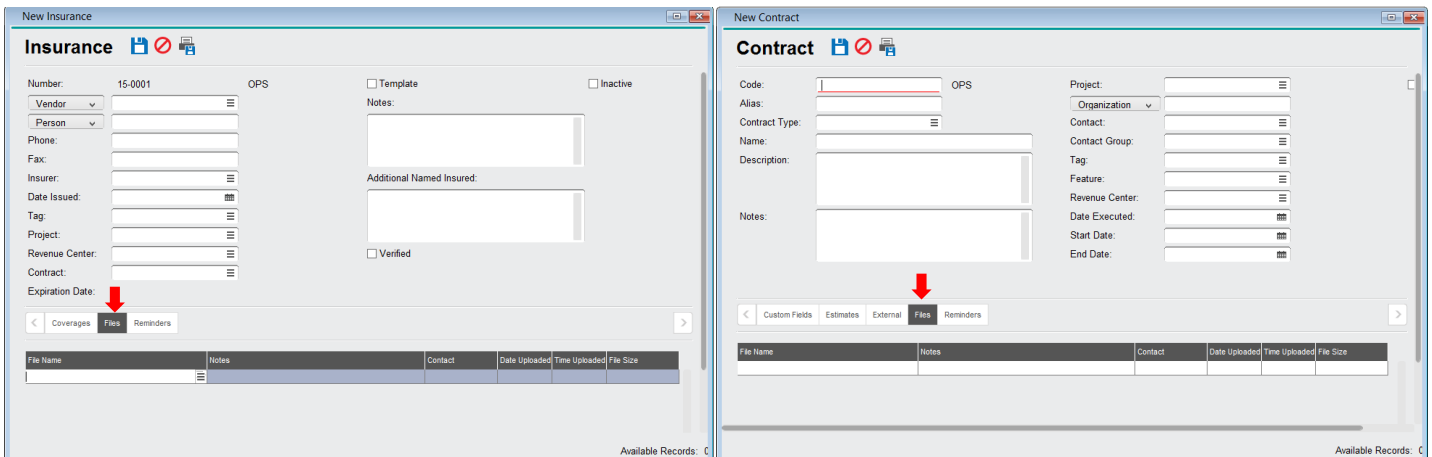
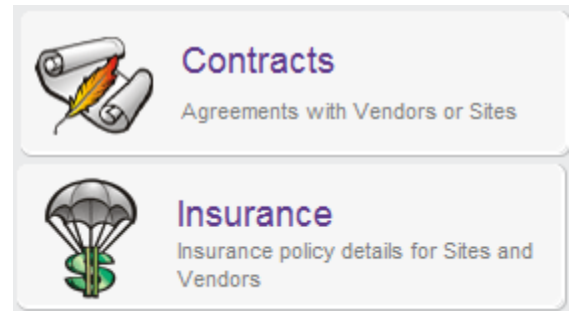


File Management – Insurance and Contracts

The File Management feature was created to allow users to add/upload files in AwareManager that can be accessed/downloaded directly from the system.

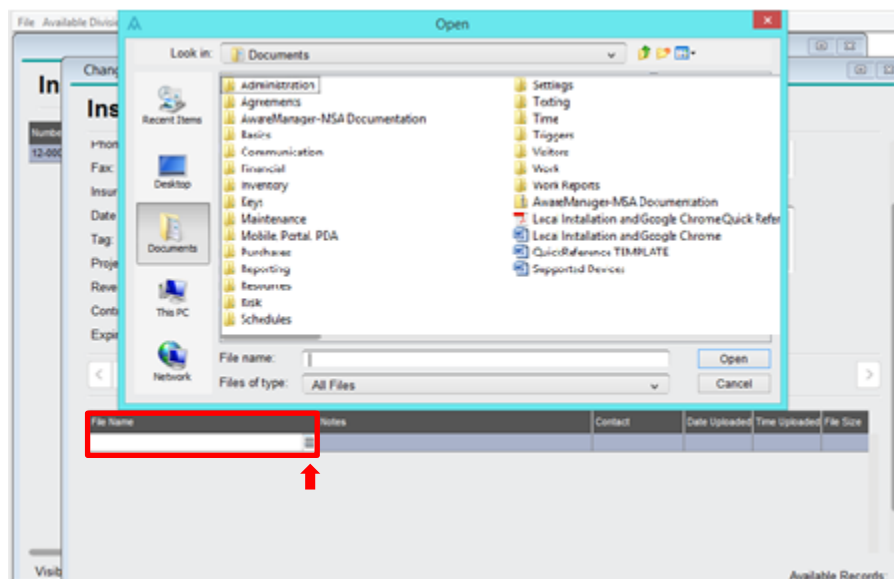
Files can be attached to a new or existing Contract or Insurance record. To access the File Management feature, locate the **Files** tab on the record




If you are uploading files to an existing record, make sure to hit the change key on the tool bar to gain access to change the record.



To upload a file, click anywhere in the **File Name** field, then select the chooser icon to can browse for the file that you want to upload



Search through your computer for the correct file, then choose Open to upload it. It will automatically populate additional information, as shown below. Repeat as necessary for additional files using the blank lines. When you have uploaded your file(s), click the **Save** icon () at the top of the record.

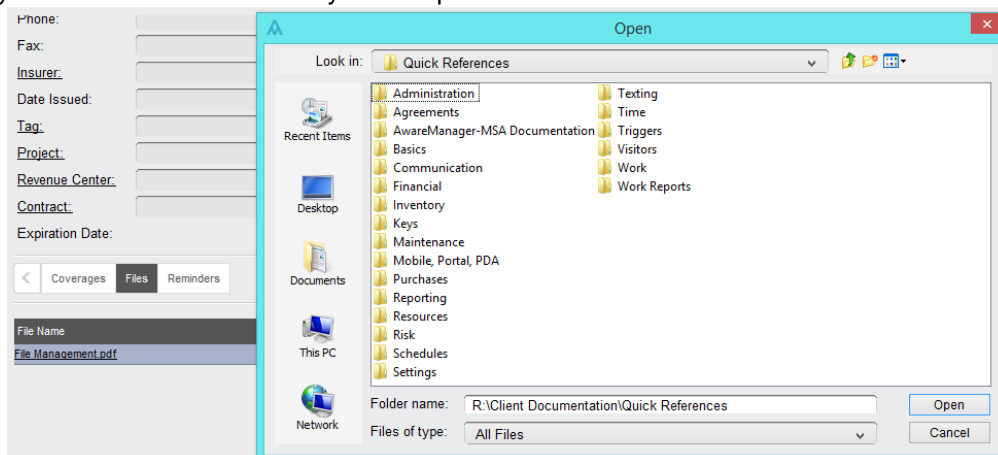
File Name	Notes	Contact	Date Uploaded	Time Uploaded	File Size
File Management.pdf	Help Documentation for File Management	ALC	July 2, 2015	16:24	165.0 KB

To access uploaded files you will need to open up the corresponding work record and go to the **File** tab once again. Clicking on the file name will bring up a chooser list. Your options are **Open** and **Save**.

File Name	Notes	Contact	Date Uploaded	Time Uploaded	File Size
File Management.pdf	Help Documentation for File Management	ALC	July 2, 2015	16:24	165.0 KB

Open
Save

Open will simply open the file with the default program for that file type. **Save** will open a window where you will need to define where you want to save the file on your computer.



Once you have selected the folder to which you would like to save the file, choose Open and you will receive a pop up message displaying the location that the file has been downloaded to. To open the file, simply go to that location on your computer.

If you need to delete a file that has been uploaded to a work record, you will need to open that work record and hit the change/key icon to edit the record. Go to the **File** tab, right click on the file name and select **Delete Line** from the chooser list. When the file has been successfully deleted, click on the **Save** icon at the top of the work record to save the record

File Name	Notes	Contact	Date Uploaded	Time Uploaded	File Size
File Management.pdf	Help D	ALC	July 2, 2015	16:24	165.0 KB

Insert Line
Add Line
Move Line To Top
Move Line Up
Move Line Down
Move Line To Bottom
Delete Line
Remove Empty Lines