Working with Documents

Last Modified on 02/25/2021 12:54 pm EST

The aACE document management features lets you easily attach files to any record in the system, making them easily accessible to all users when they need to review or revise them. Read our feature highlight (https://www.aacesoft.com/resources/seamlessly-link-records-in-aace-to-files-on-server) to see how this functionality can help your team.

Business documents may include a variety of file types (e.g. .doc, .xls, .pdf, etc). As a general rule of thumb, smaller files can be uploaded directly to aACE using the file upload features noted below. Larger files should be stored outside of aACE on a shared file server, linking to aACE records with the File Server Folder feature noted below. The upload file feature and more advanced File Server Folder feature can operate together, but we recommend that you establish clear policies so your team members know when to use each method.

A particular document can be associated with multiple aACE records; likewise, you can upload files using multiple methods:

- Field-level paperclip icon
- Docs link
- External file server

Field-Level Paperclip Icon

Some fields in aACE are associated with a particular file (e.g. a vendor's invoice, a contractor's W-9 tax form, a customer's tax-exempt certificate, etc). These fields show a paperclip icon (📎). You can click the icon to display a dialog for uploading a file or you can drag-and-drop a file from your workstation onto the icon.

Docs Link

Below the Status indicator on aACE detail views, you can use the Docs link to launch the Documents Viewer or to upload files via drag-and-drop functionality.

Documents Viewer

The Documents Viewer enables you to work with documents associated with the *current* aACE record, including:

- Viewing documents currently attached
- Attaching other documents already in aACE
- Uploading and attaching new documents
- Detaching documents

You can display the Documents Viewer from any detail view by clicking the Docs icon. The Documents Viewer initially shows a list of files associated with the current record. The following numbered features help you work with documents attached to the current record:
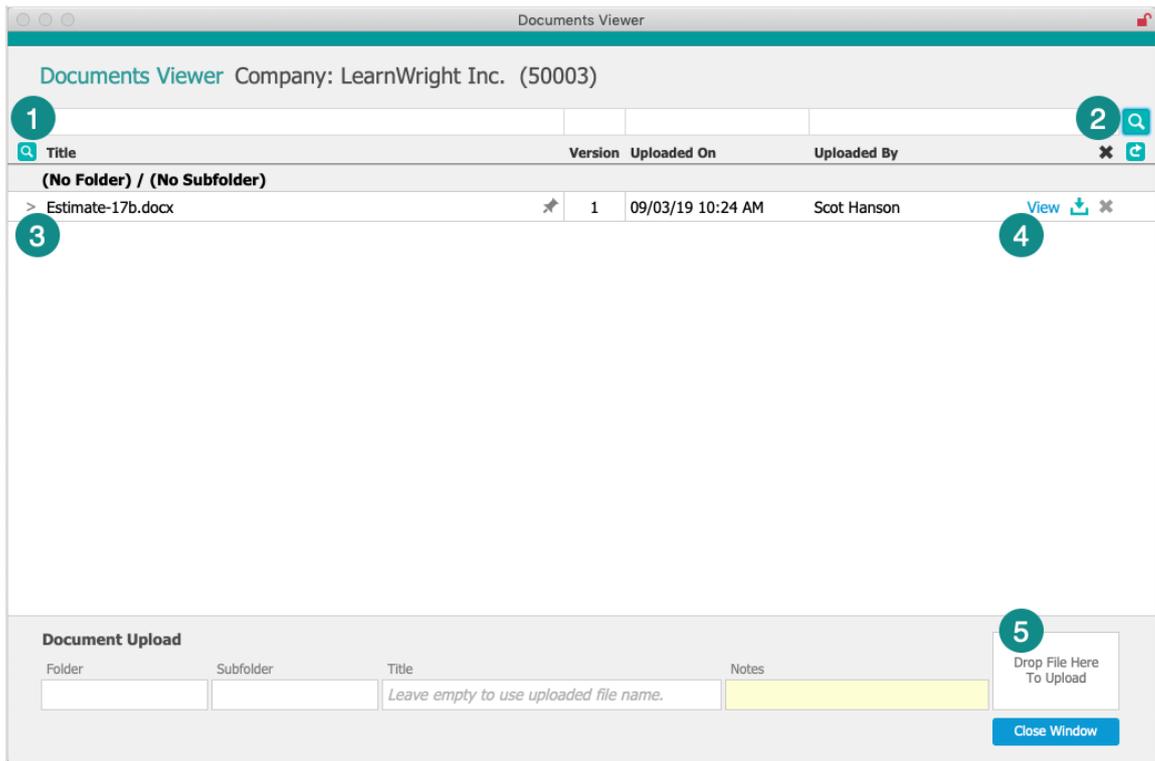
1. To attach a document that is already uploaded to aACE, click the magnifying glass icon at the left. From the Documents Selector, locate the needed document, then click it in the left pane to move it to the Selected Documents pane on the right.
2. To search for documents *already* attached to the current aACE record, input the Quick Search criteria and click the magnifying glass at the right.
3. To display details about an attached document, click the go-to link for that item in the list.
4. To review, download, or remove an attached document:
   - Click View to download a copy of the document to your FileMaker temporary folder and display it. (Note: This copy will be deleted when you close FileMaker.)
   - Click the Download icon (⬇) to save a copy of the document to your workstation.
   - Click the Delete icon (✖) to detach the document from the current record.
     Note: This does *not* completely remove the file from aACE. If an unattached document is *not* attached to any other records, it will remain as an orphaned

document in your system. Your system administrator can activate the Delete Orphaned Documents server schedule to clear out these documents. To completely remove the file, you must navigate to the Documents module, locate the document, deactivate it, and delete it.

5. To upload and attach new files to the current aACE record, input a Folder, Subfolder, Title, and Notes and then drag-and-drop the file from your workstation to the designated area.
Note: If your system requires a Folder and Subfolder to be entered, these fields will be highlighted in pink.

6. To upload a new *version* of a document, click the Version Number. You'll be prompted to select a new file from your workstation.

Docs Link Drag-and-Drop

If your system administrator has set the needed preferences, you can drag files from your workstation directly to a record's Docs link. This uploads the file and attaches it to that aACE record.

Note: If your system is configured to require a Folder / Subfolder grouping for uploaded documents, a dialog will prompt you to specify these details.

Duplicate Documents

aACE will not allow duplicate files to be uploaded to the system. On upload, aACE evaluates the contents of the file and compares it to other documents to ensure uniqueness. If an existing file is found, you'll be prompted to either goto the existing document for you to review, or attach the existing document to the current record.

If a file with the same name—but not the same contents—is uploaded to aACE, you will be prompted to either add the new file as a revision to the existing document or create a new document record.

External File Server

Your system administrator can configure the File Server Folder Launcher for your system (Menu > System Admin > Preferences > Document Management). The on-screen instructions explain how to designate folders on your company's file server to link files to

lead, project, order, or job records. These folders can have a predetermined folder structure to ensure consistency. This setup can be an effective way to work with larger files (e.g. images, diagrams, etc).

Once this configuration is set, you can use aACE to store and access files on a shared file server. Launch the external folder for a particular record by displaying that record's details view, then clicking Actions > Reveal File Server Folder:
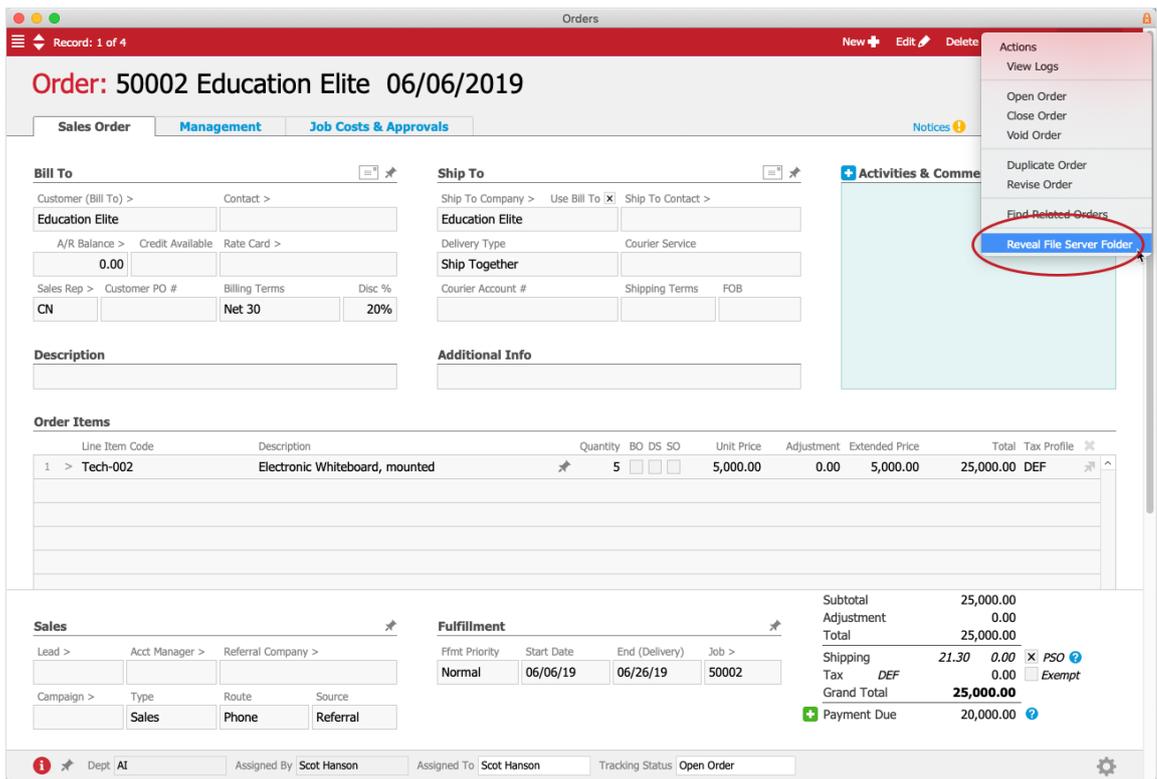

This displays the shared folder in a Mac Finder or Windows Explorer. Each record configured via the File Server Folder will have a dedicated folder on the file server.

For more information, view the demo video about the [File Server Folder Launcher](https://www.aacesoft.com/resources/seamlessly-link-records-in-aace-to-files-on-server) (https://www.aacesoft.com/resources/seamlessly-link-records-in-aace-to-files-on-server).

Document Record Details

If you need to view a list of all active documents currently uploaded to aACE, navigate to Menu > Internal > Documents. Click a document's title to view details:
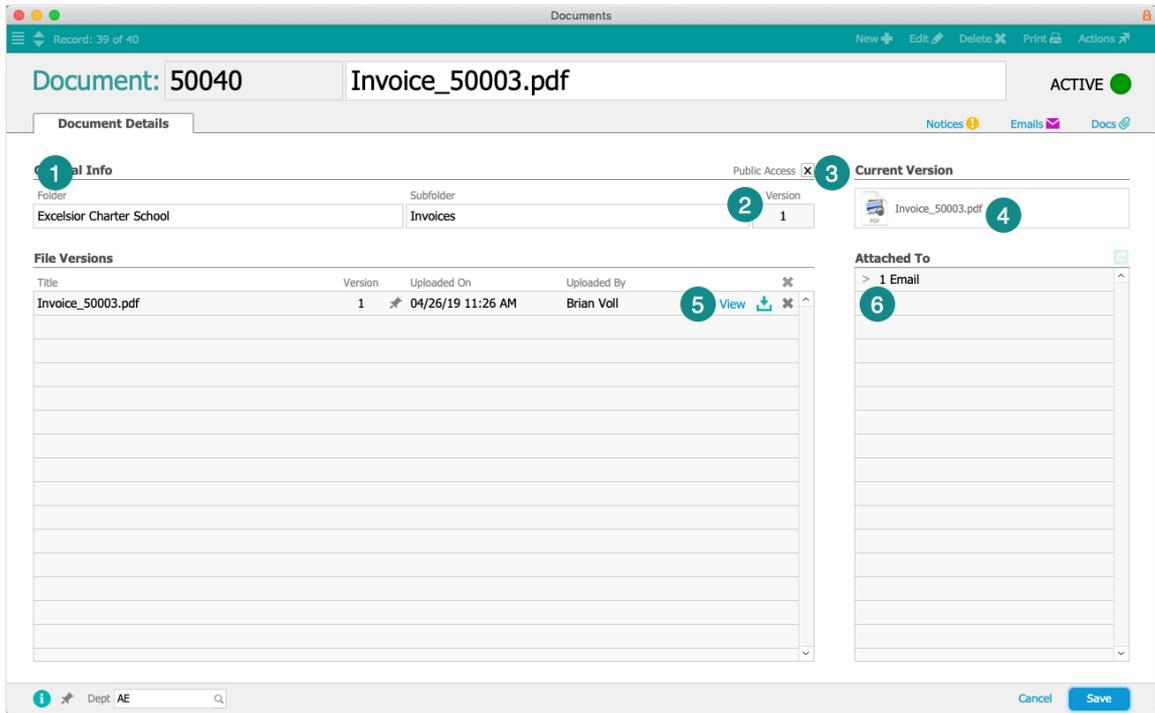
1. Grouping — Specify a Folder and Subfolder for categorizing the document (see below for details).
2. Version — Identifies the current revision number of the document.
   Note: When uploading files, the Version field increments *after* you click Save on the Document record.
3. Public Access — This flag is marked by default, noting that users from any department can view the document.
   Note: If you clear this flag, the document is *only* visible to team members belonging to the department of the document. (The department for a document can be found in the footer.) However, user groups with the "Can View All Documents" privilege can access documents that have the Public Access flag cleared.
4. Current Version — Displays a thumbnail of the file type. Depending on the current system mode, clicking this icon displays a different dialog box:
   ○ In View Mode — Downloads the current file.
   ○ In Edit Mode — Uploads a new version of the file and increments the Version number on save.
5. File Versions — Lists all versions that have been uploaded, including links for view, download, and delete functionality. The Delete icon for a single version will delete that version. The Delete icon *above* the list will delete all versions
6. Attached To List — Provides go-to links for any aACE record(s) the document is associated with.

Folder / Subfolder Groups

The Folder and Subfolder fields provide a simple method for organizing documents, but this functionality is not designed to provide an infinite folder structure. You can specify the Folder and Subfolder when uploading documents via the Document Viewer or at the Document record. Your system administrator may set preferences (Menu > System Admin > Preferences > Document Management) to make these details required, in order to help maintain data integrity and proper grouping.

Note: Documents attached via email integration (i.e. attachments on incoming emails) are automatically assigned to the Folder "Email Attachments" and a Subfolder of "[Month] [YYYY]".