

Working with Documents

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This guide provides information and best practices for working with documents. It is intended for advanced users.

The aACE document management features let you easily attach files to any record in the system. This makes files easily accessible to users for review or revision. aACE supports a variety of file types (e.g. .DOC, .XLS, .PDF, etc).

Read our [feature highlight](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) to see how this functionality can help your team.

File Sizes

The size of the documents you work with affects the best practices. As general rules of thumb:

- Smaller files can be uploaded directly to aACE using file upload features (see below).
- Larger files should be stored outside of aACE on a shared file server, linking to aACE records with the external file server folder feature (see below).

You can use both of these features as needed for various files. You do not need to restrict your workflows to using only one feature. However, we recommend that you establish clear policies so your team members understand when to use each method.

Files with Duplicate Content

aACE will not allow duplicate files to be uploaded. When you start an upload, aACE evaluates the contents of the file and compares it to other uploaded documents to ensure uniqueness. If aACE identifies a duplicate file, it will prompt you to either review the already uploaded document or attach the already uploaded document to the record you're currently working with.

Files with Duplicate Names

If you upload a file with the same name as a previously uploaded file, but with different content, aACE prompts you to either:


- Add the new file as a revision to the existing one
- Change the file name to upload it as a new document

File Upload Methods

Various documents can be associated with multiple aACE records. You can upload files in three ways:


1. Field-Level Paperclip Icon
2. Docs Link
3. External File Server Folder Upload

1. Field-Level Paperclip Icon

Some fields in aACE are associated with a particular kind of document (e.g. a vendor's invoice, a contractor's W-9 tax form, a customer's tax-exempt certificate, etc). These fields have a paperclip icon () next to them.

You can click the paperclip icon to display a file upload dialog. You can also drag-and-drop a file from your workstation directly onto the icon.

2. Docs Link

At the detail view for most records, the header area includes the Docs link (). You can drag-and-drop files onto this link or click the link to launch the Documents Viewer.

Drag-and-Drop Upload

If your system administrator has enabled the 'Allow Drag and Drop in Record Detail' preference, you can drag files from your workstation directly onto the Docs link. This uploads the file and attaches it to the current record.

Note: Your system may require a [Folder / Subfolder grouping](https://aace6.knowledgeowl.com/help/overview-of-documents-and-the-documents-finder#Folder/SubfolderGroups) for uploaded documents. aACE will display a dialog to prompt you for these details.

Documents Viewer

The Documents Viewer enables you to work with documents that are linked to the *current* aACE record. It initially displays a list of files associated with the current record. You can:

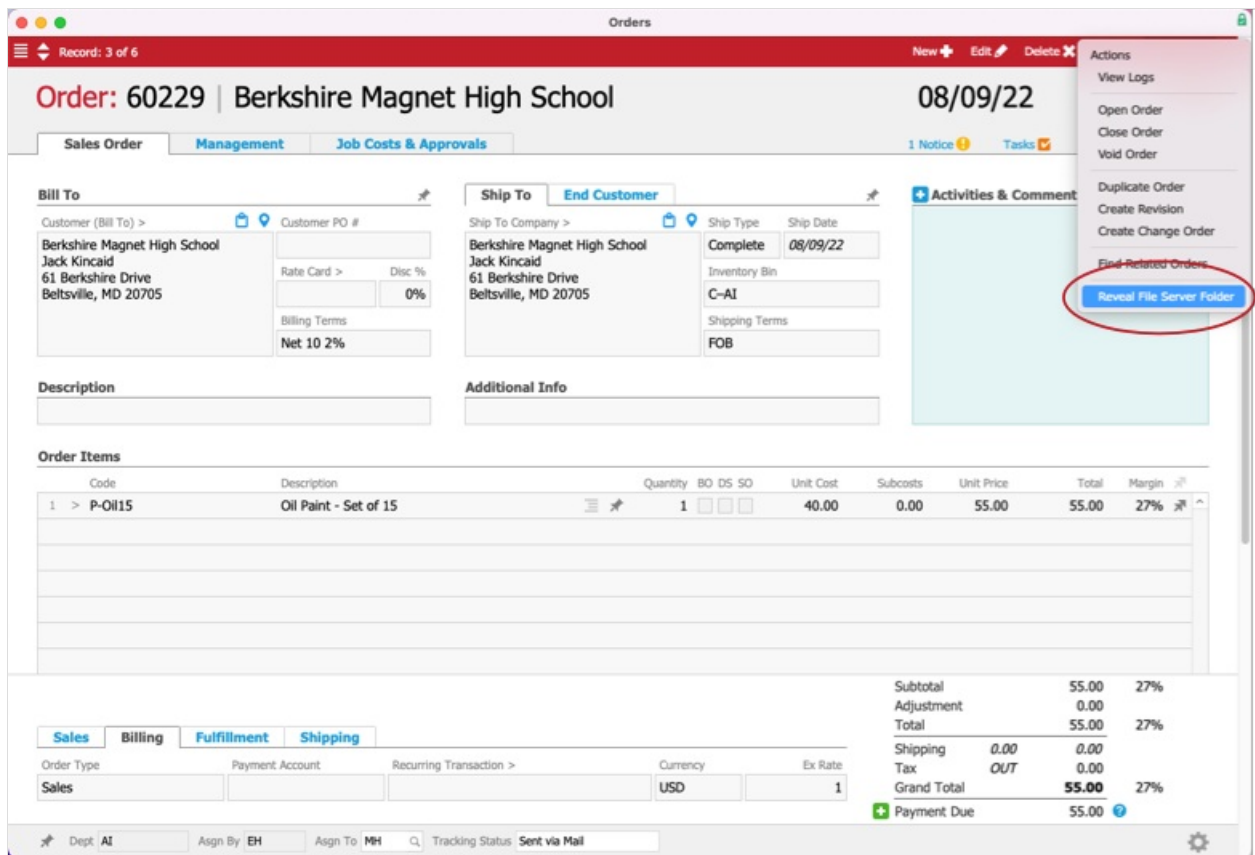
- View documents currently attached
- Link to other documents already uploaded into aACE
- Upload and attach new documents
- Detach documents

Read more about [working with the Documents Viewer](https://aace6.knowledgeowl.com/help/overview-of-documents-and-the-documents-finder) (https://aace6.knowledgeowl.com/help/overview-of-documents-and-the-documents-finder).

3. External File Server Folder Upload

Your system administrator can configure the File Server Folder Launcher for your system (Main Menu > System Admin > System Preferences > Documents). This will designate folders on your company's file server so you can link files to lead, project, order, or job records. This is often the most effective way to work with larger files (e.g. image files).

After the external file server is configured, you can use aACE to store and access files on a shared file server. To launch the external folder for a particular record, go to that record's detail view and click Actions > Reveal File Server Folder:



This option displays the shared folder on the file server in Mac Finder (or in Windows

Explorer). Each record configured via the file server folder will have a dedicated folder there.

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>).
