Add Client Documents

CA CloudDesk

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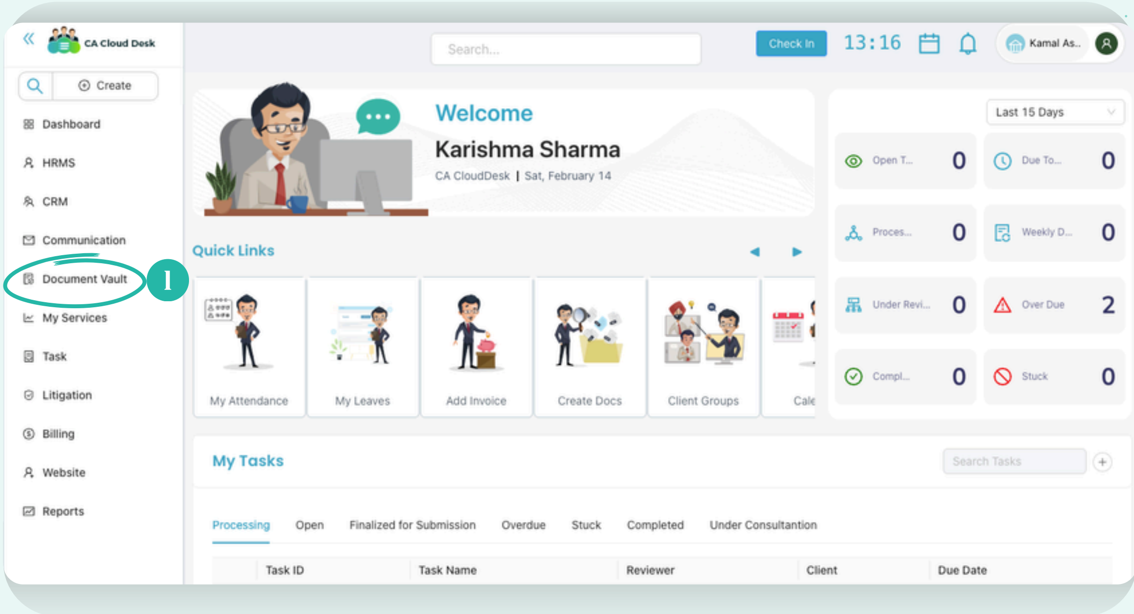
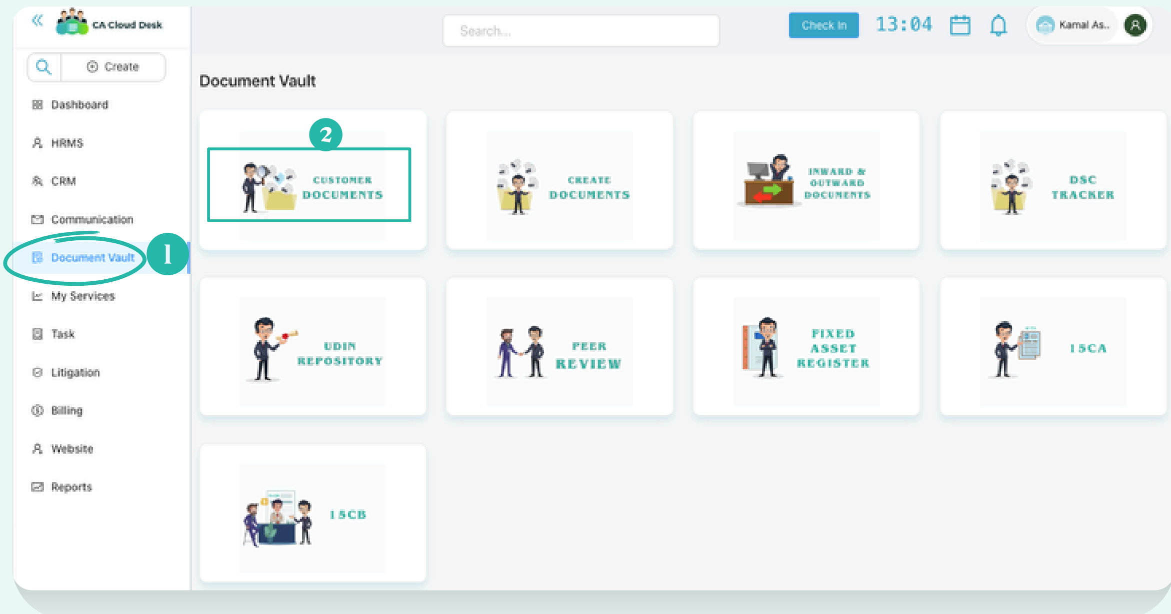
Step 1: Go to Dashboard, then select Document Vault

From the main Dashboard,Select Document Vault from left Panel.



Step 2: Select Customer Document

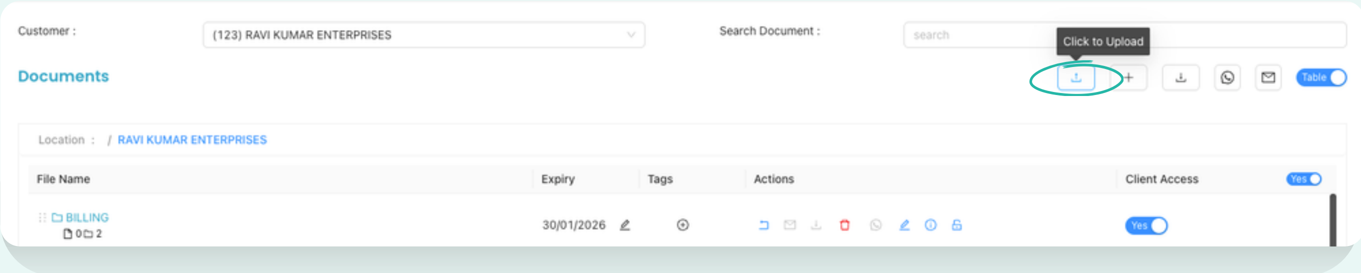
Inside Document Vault, choose Customer Document to work with client-specific documents.

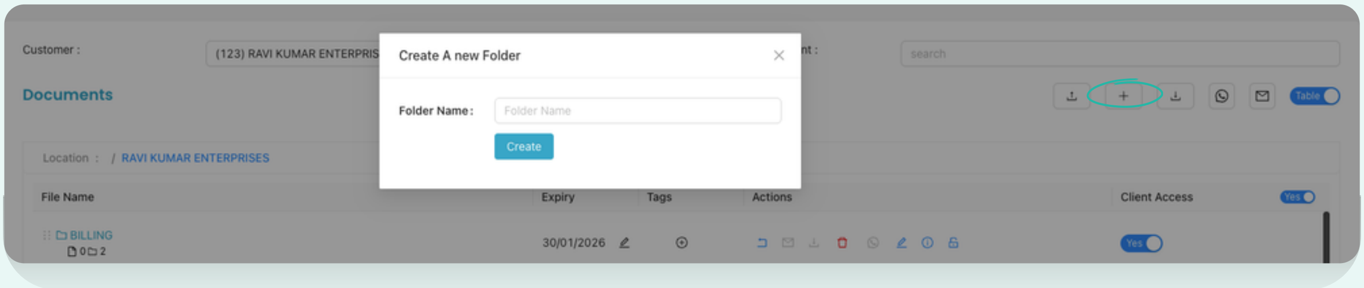


Step 3: Select Customer, then upload or create a folder

Select the Customer you want to add documents for. Then you can:

- a) Click to upload document – add files for this client.
- b) Create a new folder – name the folder using the Folder Name field to organize documents.





Step 4: Client access

To give the client access to a document, use the client access option and select Yes or No for that document.