Files Module

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# Overview

The file module serves as a centralized repository for all your company's documents, links, and files, providing a comprehensive resource for organizational use. Depending on your plan, this module offers DocuSign integration that streamlines the agreement document-signing process.

## Placeholder image

## Manage client files

Upload new files or add tags, rename, and download existing files to manage all your documents efficiently.

## DocuSign integration

Send and sign documents from within the portal using DocuSign. Please note that additional charges may apply for this premium functionality

# How To

## [Upload a new document](#7zr6prwlh57e)

1. [Modify existing documents](#fqpfz1sf24nh)
2. [Download/Delete documents](#cpe1g909wie)
3. Send documents for e-signature
4. [View signed documents](#2997tc701vbx)

**Upload documents:**

The Files module has two tabs: documents with all documents and esignatures with documents signed using docusign. To upload documents Goto the documents tab > use +Upload button on the top right corner and follow the prompt as desired.

**Modify existing documents:**

Existing documents can be renamed and tags can be added for efficient organization of all client files and documents.

Find the file using the search bar, use the ellipses in the corresponding file, and choose the option to Rename or Add Tags accordingly.

**Download / Delete documents:**

Find the file using the search bar, use the ellipses in the corresponding file, and choose the option to Download or Delete accordingly.

**Send documents for e-signature:**

**View signed documents:**

Signed documents can be viewed in eSignatures tab. These documents can be renamed, tagged, downloaded, or deleted using the same steps.