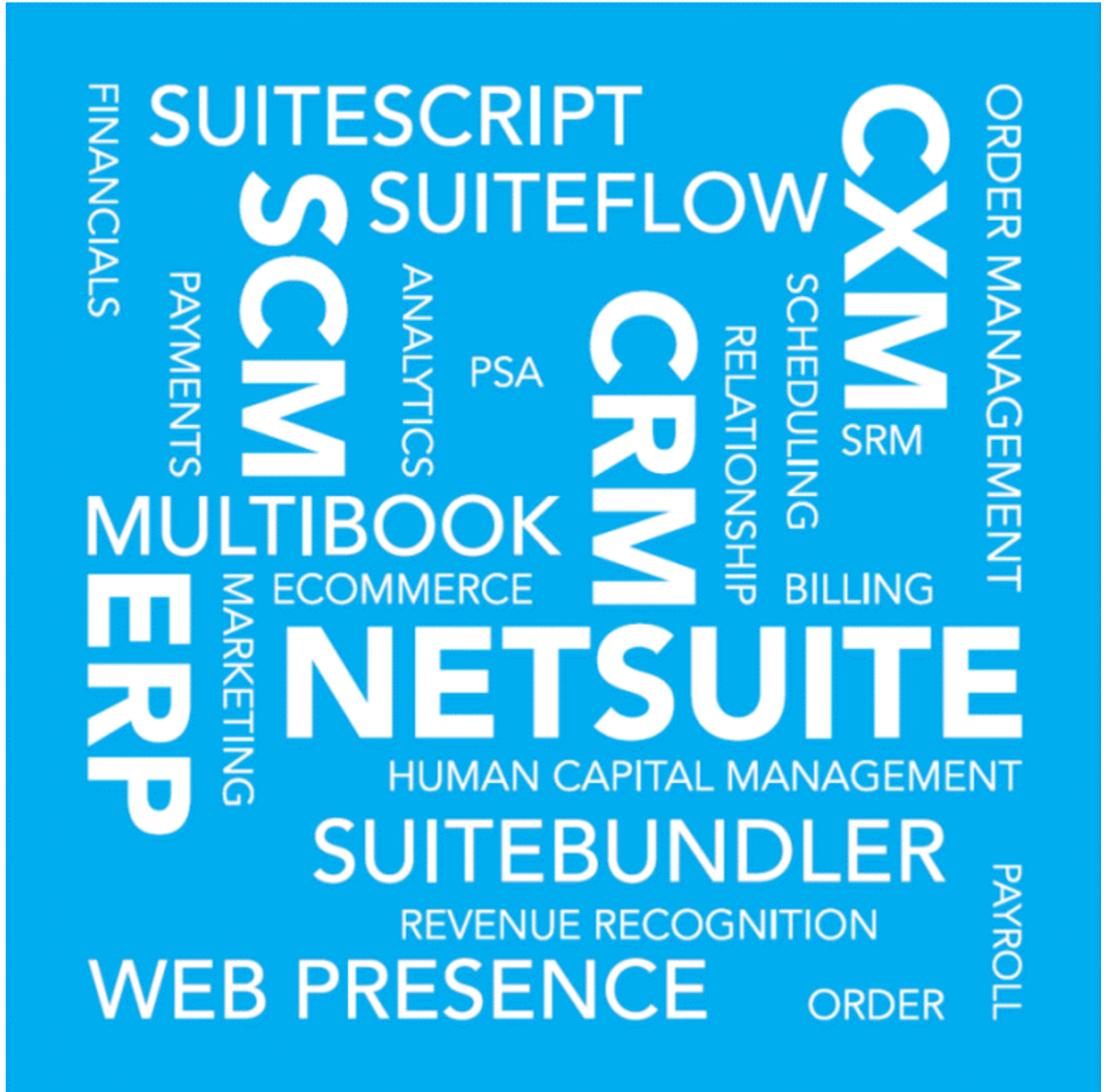


# Uploading Files Using File Drag and Drop



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# Table of Contents

Uploading Files Using File Drag and Drop .....	1
Using File Drag and Drop .....	1


# Uploading Files Using File Drag and Drop

File Drag and Drop enables you to upload single or multiple files from your desktop to the file cabinet or to a record page. It can also be used to attach multiple files directly to editable sublists of supported records and custom records. To learn how, see [Using File Drag and Drop](#).

 **Note:** Your administrator must install and configure File Drag and Drop before you can use it.

## Using File Drag and Drop

You can drag and drop single or multiple files from your desktop to the Drag and Drop enabled file cabinet and to a record or sublist line item.

 **Note:** The Drag and Drop enabled cabinet is separate from the built-in file cabinet. You can access the Drag and Drop enabled File Cabinet from Documents > Drag and Drop Files > File Cabinet. For more information, see [To add files to the file cabinet](#).


Read the following topics for more information on using File Drag and Drop:


- [Setting General Preferences for File Drag and Drop](#)
- [Adding Files to a Record Page and Line Item](#)
- [Adding Files to the File Cabinet](#)
- [Inserting URLs of Uploaded Files](#)
- [Changing the Destination Folder from the Drop Zone](#)

## Setting File Drag and Drop Preferences

### To set user preferences for File Drag and Drop:

1. Go to Home > Set Preferences, and then click the **Custom Preferences** subtab.
2. Under File Drag and Drop, set values for the following preferences:
  - **Enable File Drag and Drop in View Mode** – Check this box to enable File Drag and Drop in view mode for all users of this account.
  - **Enable File Drag and Drop** – Check this box to enable File Drag and Drop in your account.

 **Note:** File Drag and Drop is only available on forms with a Files subtab. If the Files subtab is removed from a custom form, the drop zone will not be displayed.

 **Important:** Users who have the File Drag and Drop feature enabled must have write access to the destination folder. If you do not have access to the folder, a different destination folder may be selected from the options available in the drop zone. The available options only include active folders and private folders that you have access to.

- **Hide Tutorial Notification** – Check this box to hide the File Drag and Drop tutorial notification on record pages.

**Note:** When you open a record where File Drag and Drop is enabled, a pop-up notification appears. The notification lets you launch the File Drag and Drop tutorial. You can also hide or show the tutorial from the record page. To hide the tutorial, click **Don't Show this message again** on the tutorial notification. To view the tutorial again, click the drop zone to view more options, and then click **Tutorial**.

## Adding Files to a Record Page and Line Item

To add files to a record page and line item:

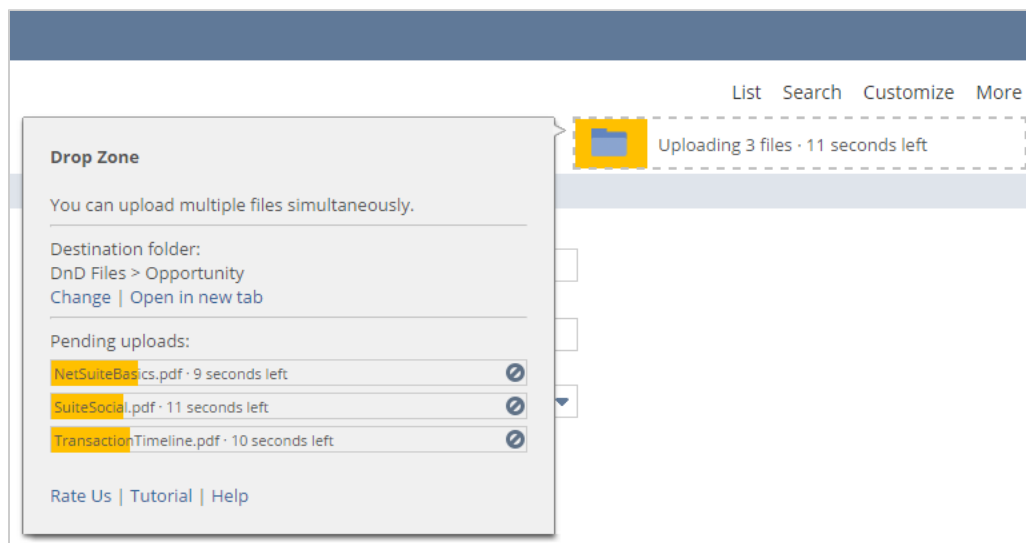
1. Create or edit a record.

**Note:** A star on the folder icon in the drop zone indicates that the record contains file attachments. You can click the folder to view the attached files.

2. On your computer, select the files you want to upload and drag it to the drop zone. Dropping the file starts the upload process.

**Important:** When you create a record, changes to some field values may cause the record page to refresh. The page refresh causes File Drag and Drop to create multiple unique folders for the record that is being created. For example, when you change the value of the Customer field on Sales Orders, the page may require you to use a different form if the selected customer belongs to a different subsidiary or is under a different nexus. Every time the Sales Order page is refreshed, File Drag and Drop creates a new folder.

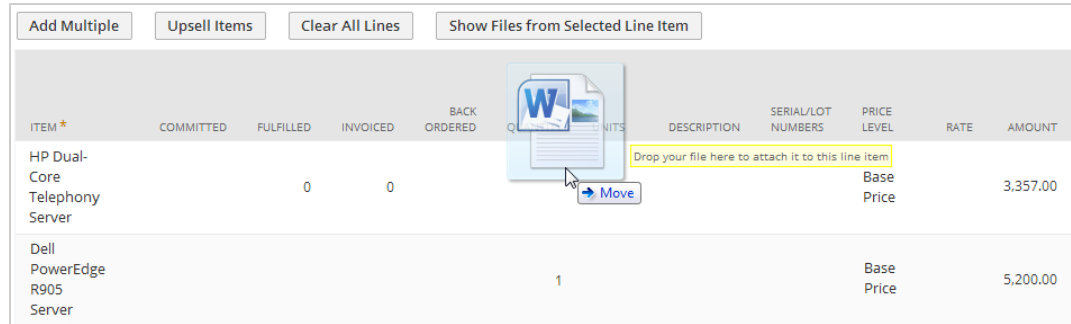
3. If a file with the same name exists, a popup prompts you to overwrite the file or cancel the upload. Click **Yes** to proceed with the upload. Otherwise, click **No**.
4. To cancel a file upload, click the drop zone to display additional options. In the Pending uploads section, click the cancel icon.



The record updates automatically to reflect the uploaded file. Files attached to the record are listed under Communication > Files.

5. To attach files to a line item, drag a file from your computer and then drop it to the transaction line.

You can drop files to line items that have been previously added to the record. If you want to attach a file to a line item that you have added, save the record first, and then open it in edit mode.



**Note:** Files uploaded to new records you are creating will not be deleted when the record is not saved.  
You can attach files to line items only in edit mode.

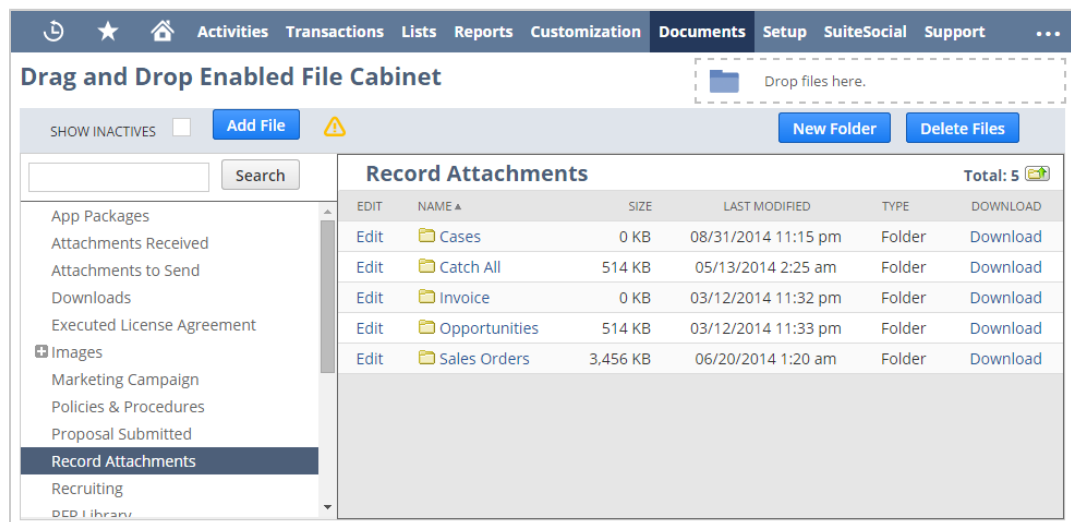
6. Click **Show Files from Selected Line Item** to view files attached to the selected transaction line.

**Note:** The maximum size per file is 10 MB.

## Adding Files to the File Cabinet

To add files to the file cabinet:

1. Go to Documents > Drag and Drop Files > File Cabinet.



2. Select the destination folder from the Folders list. The selected folder is indicated inside the Dropzone.
3. Drag files from your computer to the Dropzone to upload it to the selected folder.

## Inserting URLs of Uploaded Files

### To insert URLs of uploaded files:

You can automatically insert the URL for a file you uploaded into text fields within the record.

1. Create or edit a record.
2. On your computer, select the files you want to upload and drag it to the text area where you want to insert the URL. Drop the files.

The system automatically appends the URL to the end of the text entered in the field. You can add text after the URL, or drag more files to the same field to insert additional URLs. You can copy and paste the URL to your browser to open the file.

The screenshot shows the Oracle NetSuite interface for an Opportunity record. The record is titled '3 8 Wolfe Electronics' and is in 'IN PROGRESS' status. The form includes several fields for data entry, such as 'Opportunity #', 'Title', 'Company', 'Sales Rep', 'Partner', 'Status', 'Probability', 'Expected Close', and 'Win/Loss Reason'. A 'Details' section at the bottom contains a text area with a URL: 'https://system.netsuite.com/core/media/media.nl?id=1147&c=3747485&h=523a5f4dfc725a22d149'. A red box highlights this text area.

**Note:** This does not apply to text fields within sublists.

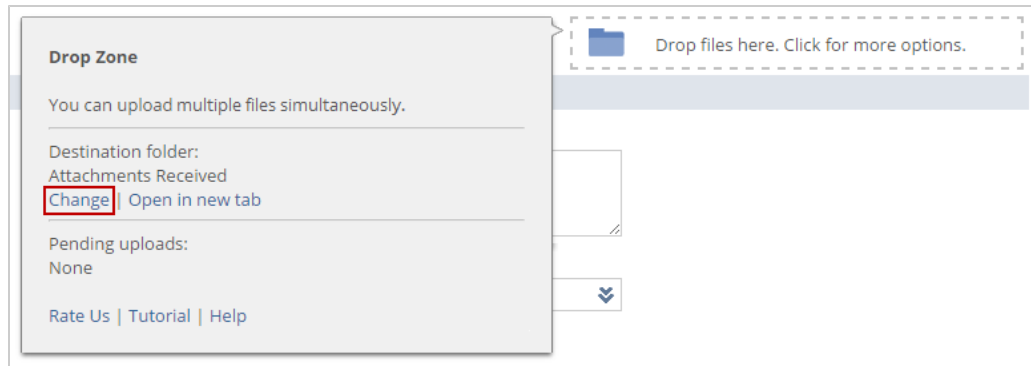
## Changing the Destination Folder from the Drop Zone

When you upload files to a record page, you can override the default destination folder for that record. The change will only be applicable in the current instance. When the page is refreshed, the destination folder will be reverted to the default folder.

### To change the destination folder from the drop zone:

1. Create or edit a record.
2. Click the drop zone to display more options.





3. Click **Change** to open the File Cabinet pop-up.
4. Select a destination folder for this instance, and then click **Select Folder**.