

CITK

Documents



Overview - Documents Print

Adding, sharing, and requesting documents from contacts have never been easier. Documents aim to streamline the entire document management and sharing requirements for your business. Documents are broadly categories into 3 categories:

1. Internal Documents
2. Sent to Contact Documents (*coming soon*)
3. Received from Contact Documents (*coming soon*)

Internal Documents

Store documents for your contacts within the CRM on the Contact details page. These documents can be accessed by users who have access to view the contact.

Documents added to custom fields are added to a Folder named "Custom Fields" in the "Internal" section.


Documents in custom fields are non deletable


Documents : CITK


[Activity](#) [Task](#) [Notes](#) [Appointment](#) [Documents](#)


[+ Add](#)


[All](#) [Internal](#) [Sent](#) [Received](#)


 **Custom Fields**
3 files


 **Screenshot 2023-10-21 at 5.42.46 PM.png**
285KB | October 22, 2023


 **Screenshot 2023-10-21 at 3.55.53 PM.png**
227KB | October 22, 2023


 **Screenshot 2023-10-21 at 4.05.46 PM.png**
224KB | October 22, 2023

 **Screenshot 2023-10-21 at 5.38.14 PM.png**
422KB | October 22, 2023

 **Screenshot 2023-10-21 at 3.55.35 PM.png**
233KB | October 22, 2023

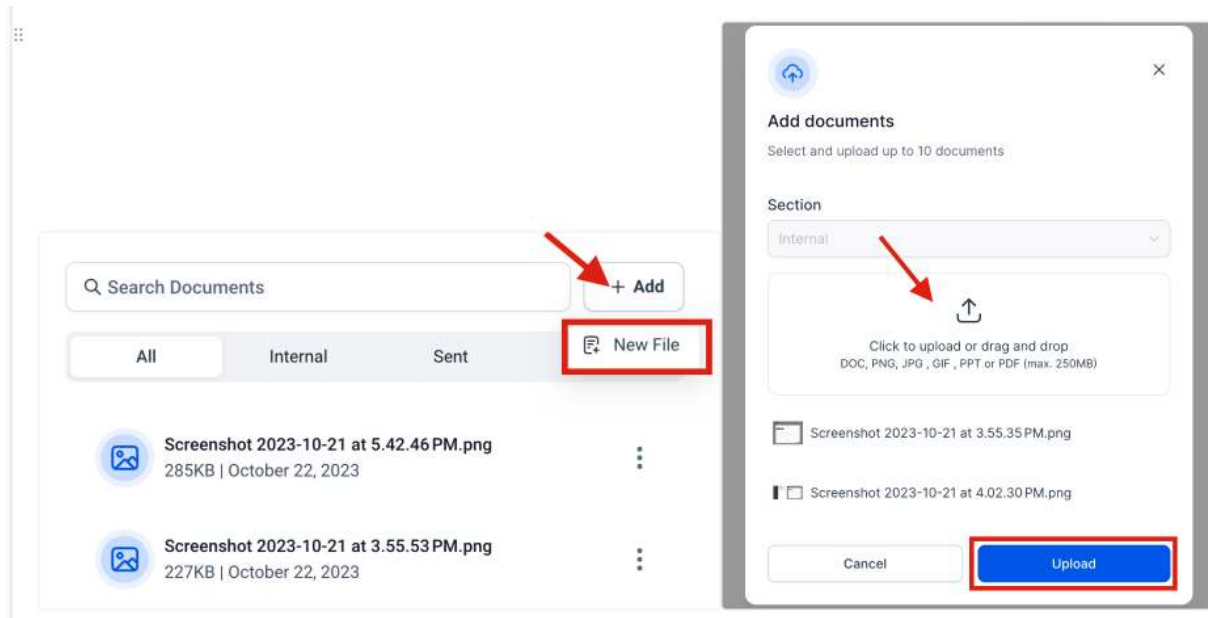
 **Screenshot 2023-10-21 at 5.38.51 PM.png**
143KB | October 22, 2023

 **Screenshot 2023-10-21 at 4.02.30 PM.png**
280KB | October 22, 2023

 **Screenshot 2023-10-21 at 4.38.25 PM.png**
453KB | October 22, 2023

Add new documents to the internal section by hitting "+Add" -> "New File"

- The max size limit per document is **250MB**
- Document types supported = PPT, Docs, PDF, CSV, and various image formats



Searching for the Documents

Search documents based on the Document Name in the contact details page