

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

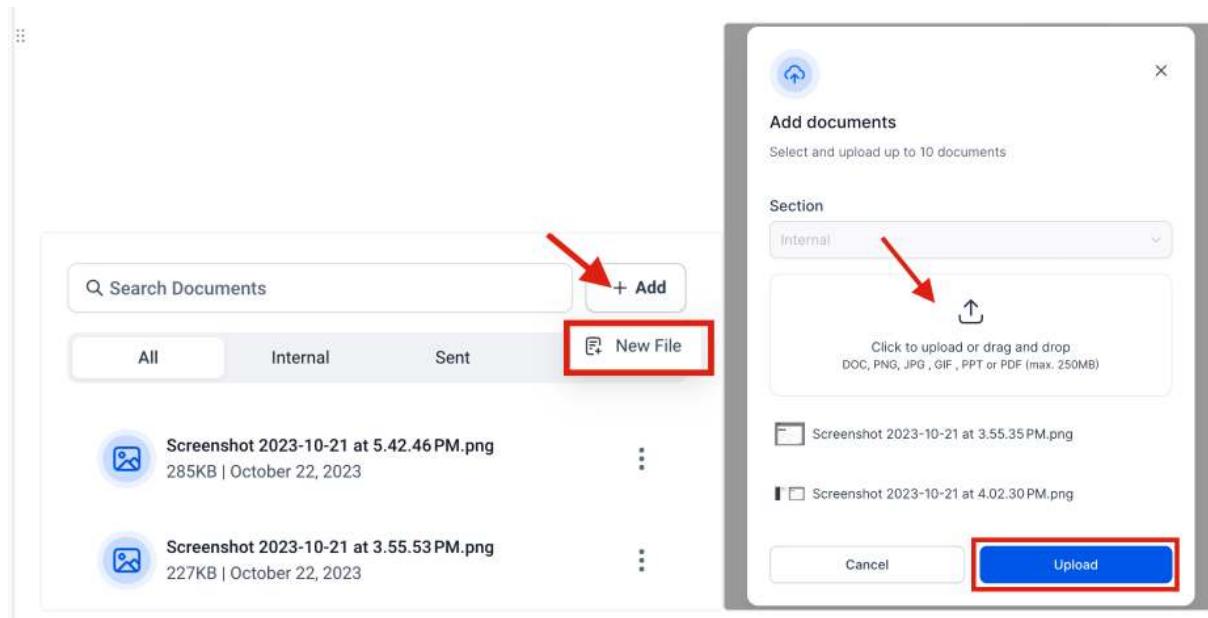
 **Screenshot 2023-10-21 at 5.38.51 PM.png**
143KB | October 22, 2023

 **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



The image shows a screenshot of the CITK Documents interface. On the left, there is a search bar labeled 'Search Documents' and a button labeled '+ Add'. Below these are three tabs: 'All', 'Internal', and 'Sent'. The 'Internal' tab is selected. A red box highlights the '+ Add' button, and a red arrow points to it from the top right. Below the tabs, there are two document thumbnails. The first is 'Screenshot 2023-10-21 at 5.42.46 PM.png' (285KB) and the second is 'Screenshot 2023-10-21 at 3.55.53 PM.png' (227KB). Each thumbnail has a three-dot menu icon to its right. On the right side of the interface, a modal window titled 'Add documents' is open. It contains a section for 'Section' with a dropdown menu set to 'Internal'. A red box highlights the 'Internal' option, and a red arrow points to it from the top right. Below this is a file upload area with a placeholder 'Click to upload or drag and drop' and a note 'DOC, PNG, JPG, GIF, PPT or PDF (max. 250MB)'. There are two file selection boxes: one for 'Screenshot 2023-10-21 at 3.55.35 PM.png' and another for 'Screenshot 2023-10-21 at 4.02.30 PM.png'. At the bottom of the modal are 'Cancel' and 'Upload' buttons, with the 'Upload' button highlighted by a red box and a red arrow pointing to it from the top right.

Searching for the Documents

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