

Document Library Management

A guide to understanding and utilising the Document Library functionality in Motorcentral.

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Overview

The Document Library is a feature of the Motorcentral DMS that allows files (such as papers, images, videos etc) to be stored against a vehicle, sale or contact. This allows one handy location for all your important items related to a particular entity.

For example you may wish to store:

- A copy of an auction sheet against a particular vehicle
- A scanned copy of a signed Sale Agreement against a particular sale
- A photo of a customer's driver's license against a particular contact

Adding and removing from a document library is easy and Motorcentral manages the entire process. You simply need to upload file(s) from your device, label them and Motorcentral will automatically record the date they were added as well as store them.

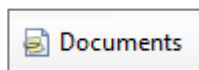
If you simply wish to store a document that is not related to a particular vehicle, sale or contract (eg. Legal Documents, Yard Photos etc), you can elect to save these in your Dealerships Document Library instead.

Accessing a Document Library

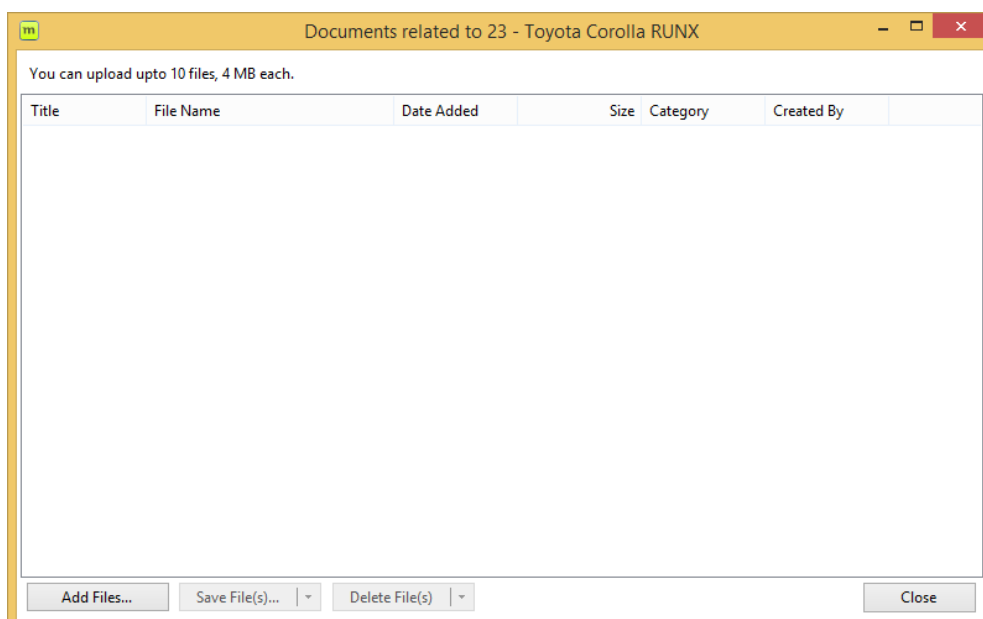
An individual Document Library can be accessed from within a vehicle, sale or contact and also from the Main Window when accessing the Dealership's Document Library.

To access:

1. For entity related documents first open the vehicle, sale or contact record you wish to view the Document Library for.
2. From the menu bar click the *Documents* button.



You will then be presented with the appropriate Document Library.



Adding a new document

1. With the desired Document Library open, click the *Add Files...* button.
2. Select the file(s) from your device you wish to add - you may select more than one file at the same time. Press the *Open* button to add.
3. Next you will be asked to add a Title (optional) and to categorise the file(s) (also optional). Enter as much information as preferred and then press the OK button.
4. The files will then begin to upload to the Document Library and once completed you will see them within the Document Library List.

Please Note: there are limits to both the maximum size of each individual file as well as the total number of files you can store per entity or dealership. These limits will be clearly visible when opening the Document Library.

Editing a document

1. With the desired Document Library open, right-click the file you wish to edit and select Edit Properties...
2. Modify the Title (optional) and select a category (also optional).
3. Click the OK button to save your changes.

Deleting a document

1. With the desired Document Library open select the file(s) you wish to delete. You can select more than one file at a time.
2. Click the *Delete File(s)* button at the bottom of the window.
3. Confirm your deletion by clicking the *Yes* button.

You can also opt to delete all files within a Document Library:

1. With the desired Document Library open select at least one file.
2. Click the arrow on the *Delete File(s)* button at the bottom of the window, and select Delete All.
3. Confirm your deletion by clicking the *Yes* button.

Opening a document on your device

To open a document contained within a Document Library, simply double-click the item. This will download to your device and select the appropriate viewer if available.

Saving a document to your device

You can save a file or files to your local device from the Document Library. Simply:

1. With the desired Document Library open select the file(s) you wish to save. You can select more than one file at a time.
2. Click the *Save File(s)* button at the bottom of the window.
3. Select the location you wish to save the file(s) to and click the *OK* button.
4. Your files will then be downloaded and saved to the selected location.

You can also opt to save all files within a Document Library:

1. With the desired Document Library open select at least one file.
2. Click the arrow on the *Save File(s)* button at the bottom of the window, and select *Save All*.
3. Select the location you wish to save the files to and click the *OK* button.
4. Your files will then be downloaded and saved to the selected location.