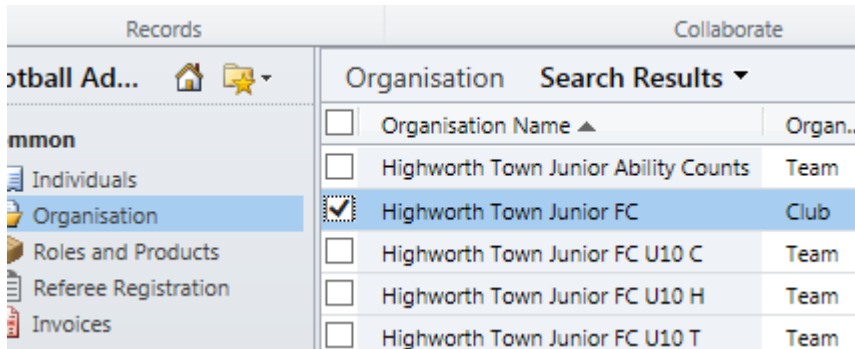
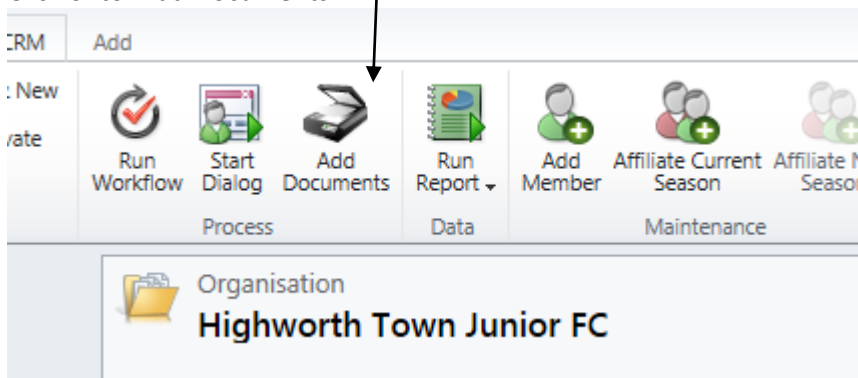


## Uploading Documents to CRM Organisations

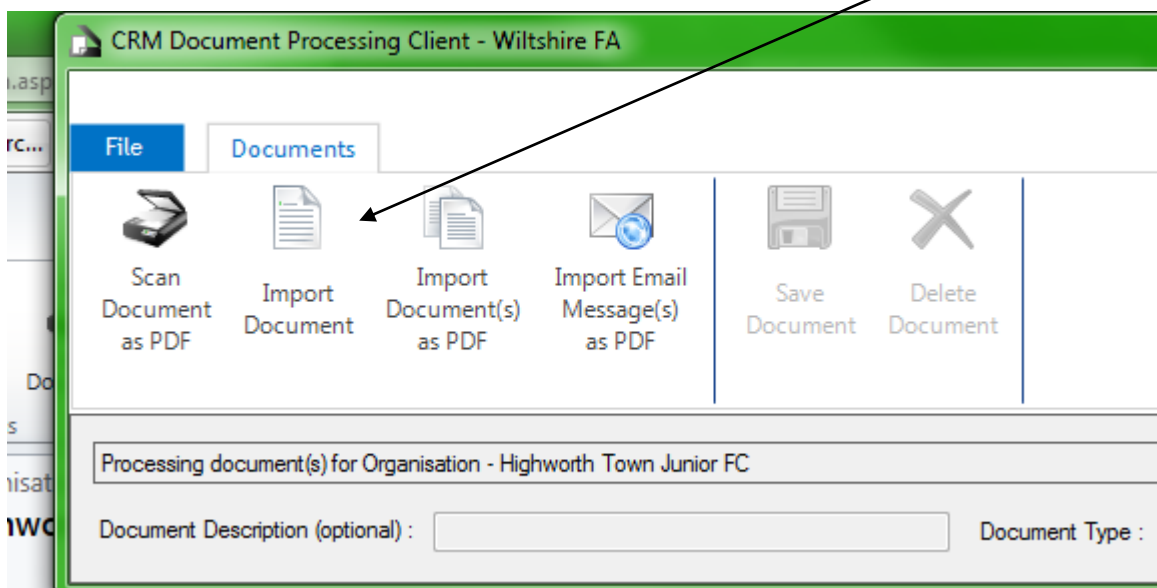
Locate the organisation in CRM and open the record:



Click onto 'Add Documents'



A new dialogue box will appear and you can select 'Import Document'





Select the document you wish to upload and hit ok then you'll receive a note to confirm the document has been uploaded

The screenshot shows a document management interface. At the top, there are several buttons: 'Document as PDF', 'Import Document', 'Document(s) as PDF', 'Message(s) as PDF', 'Save Document', and 'Delete Document'. Below these buttons, a header reads 'Processing document(s) for Organisation - Highworth Town Junior FC'. There is a text input field for 'Document Description (optional):' and a dropdown menu for 'Document Type:' set to 'Organisation Document'. The main content area contains a message: 'The document has been loaded but cannot be previewed by this application. Please click on the link below to preview document in external editor.' Below this message is a blue hyperlink: '[Change of Officer Wilts FA shirly.doc](#)'.

From here just select 'Save Document' at the top of the screen and it will save the document to the organisation record.

This screenshot shows a row of three buttons: 'Import Email Message(s) as PDF' (with an envelope icon), 'Save Document' (with a floppy disk icon), and 'Delete Document' (with a red X icon). Below the buttons, a header reads 'Highworth Town Junior FC'.

To double check the document's been uploaded, head back to the organisation record in CRM, and select 'Documents' from the Related items towards the lower left of the page and you should see that your document has been uploaded.

The screenshot shows a CRM interface with a 'Documents' section. The title bar reads 'Documents Documents Associated View'. Below this is a table with two columns: 'Name' and 'Created On'. The table contains one entry: 'WIL Highworth Town Junior FC 14 Oct 2016' with a 'Created On' date of '14/10/2016 11:07'. An arrow points from the text above to the 'Created On' column.

Name	Created On
WIL Highworth Town Junior FC 14 Oct 2016	14/10/2016 11:07