Uploading Documents to CRM Organisations
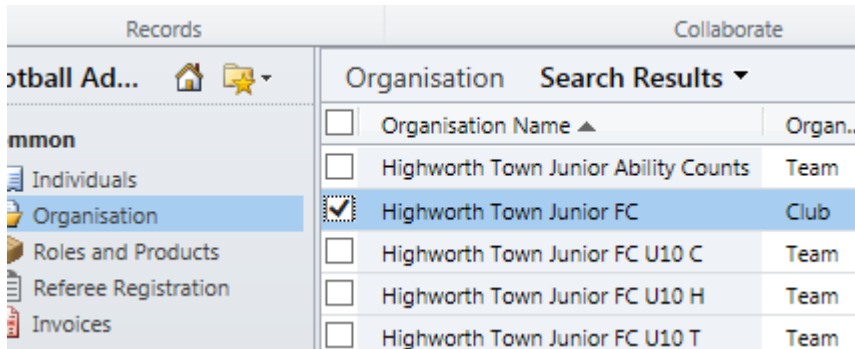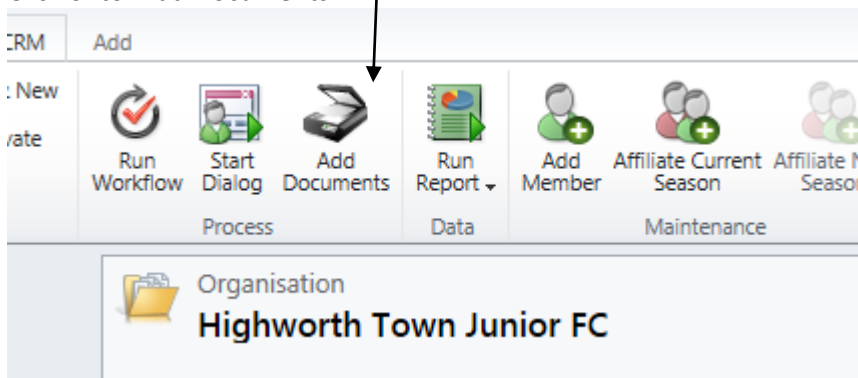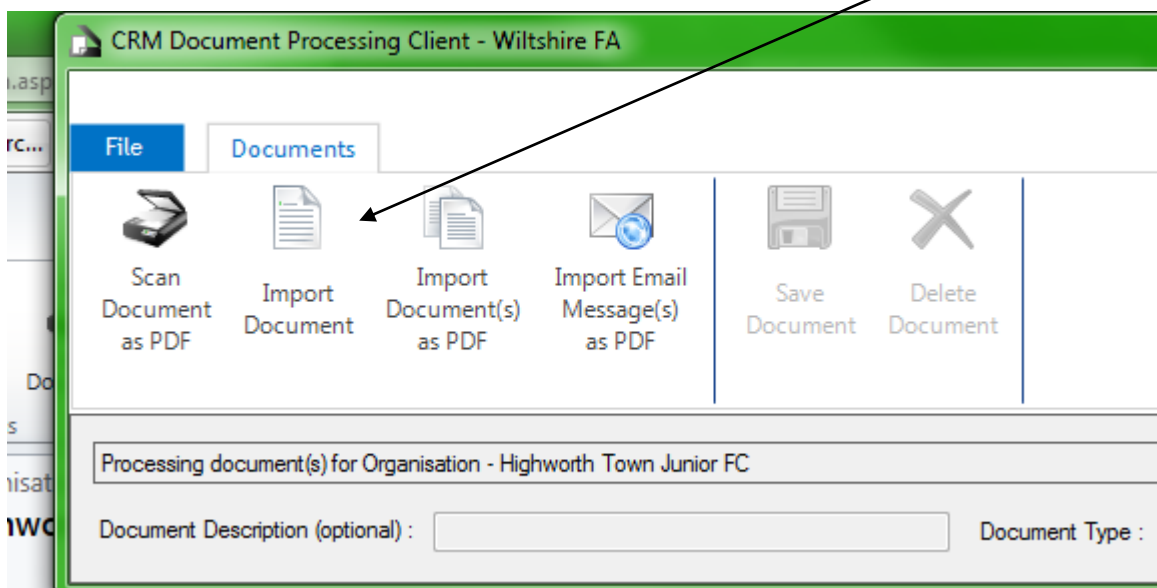
Locate the organisation in CRM and open the record:

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

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

To double check the document's been uploaded, head back to the orgsnisation 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.