File Upload

Add files to a member dashboard that can be stored and then downloaded. Files cannot be viewed online.

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How does the file upload process work?

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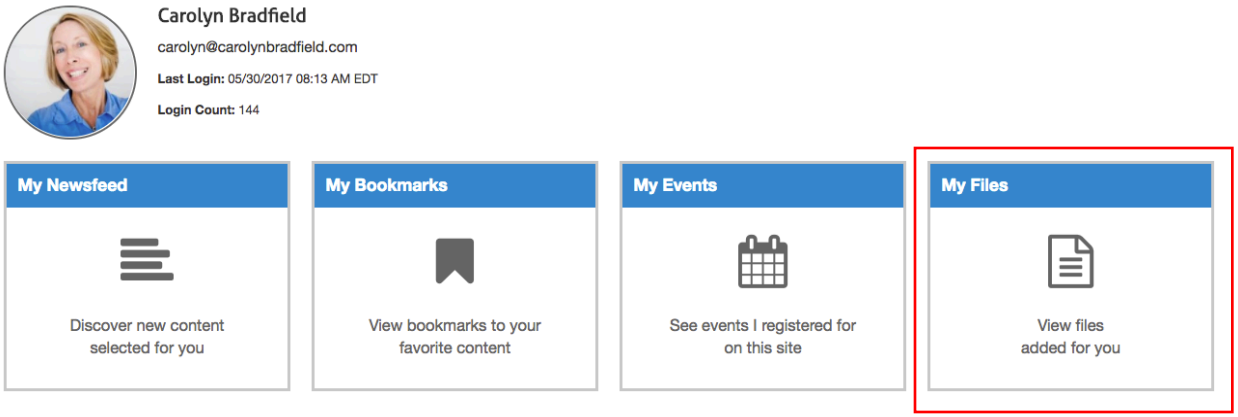
How do I know if my upload was successful?

How do members know that a file is waiting for them?

File Upload

Files can be uploaded to the member dashboard so members can store them or download them. Files are not processed to be viewed online. A single file can be delivered to one member or a group of members. Individual files can be uploaded in a "batch" and delivered to the dashboards of the appropriate member. Files appear in the "Files" tab of the dashboard.



Files are organized into folders that are set up in Member Administration.

QUICK TIP

Administrators are notified by email if a file did not upload correctly. Members can be notified by email if a file is waiting for them.

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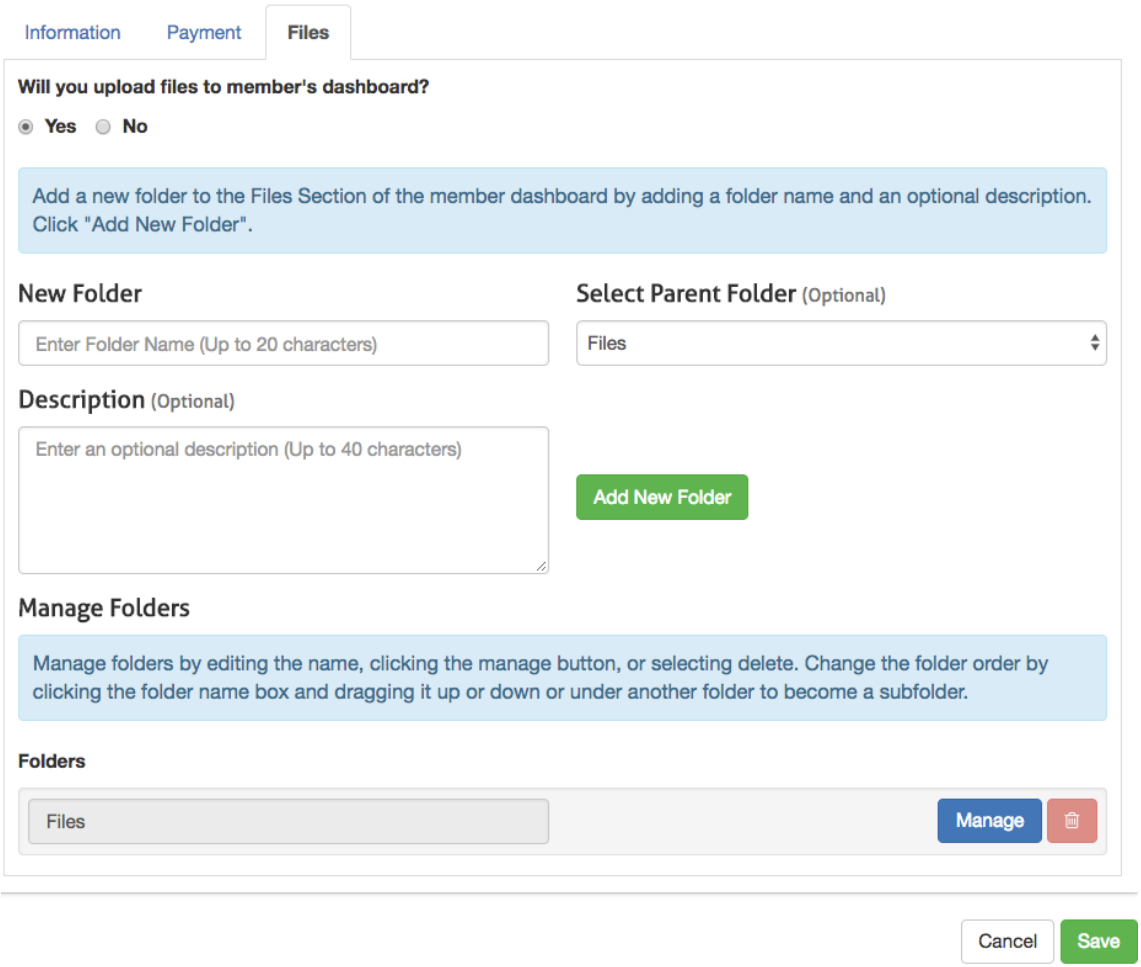
Set Up Folders in Member Administration

Set up the file folders that will appear in the member dashboard by going to **Administration**, then **Members** and selecting "**Member Set Up**". Access the "**Files**" tab. Click "Yes" to indicate you will upload files. Create folders by entering the folder name and an optional description. Folders can be organized as subfolders under a parent folder. Once folders are created, you can change the position of the folder by dragging it up or down in the Manage Folder list.



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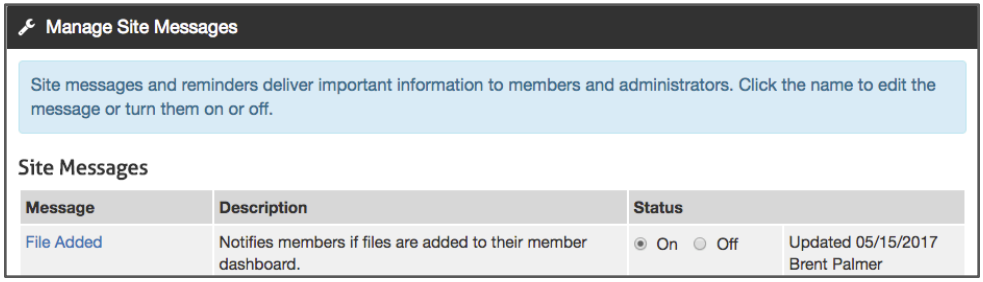
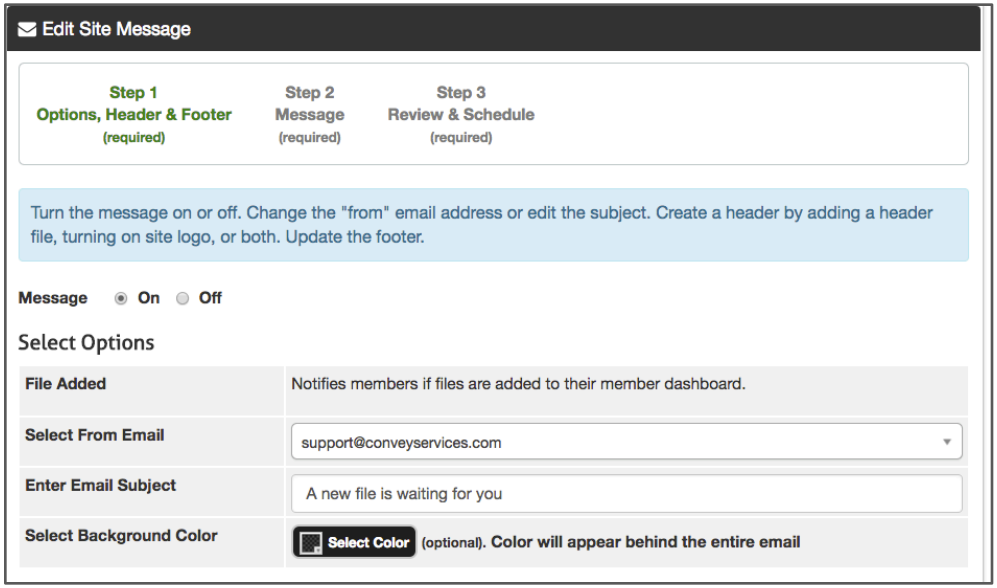
Set Up Email in Message Library

Members can be notified by email that a file is waiting for them. Customize that email from the message library. From the dashboard, select “Site Options”, then “Message Library”. Select “Site Messages”, then “File Added”. Customize the message or use the standard language. If you do not want a message delivered when a file is uploaded, turn the email off.



Customize the message by adding a header & footer (or selecting the default), adding a “from” email and subject line, then customizing the message.



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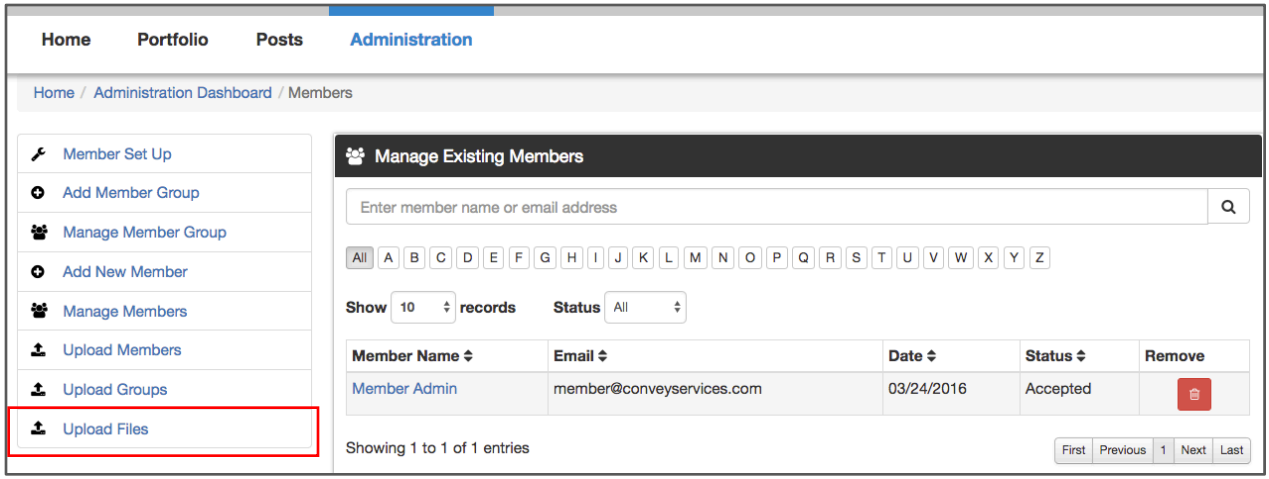
Locate the File Upload

Once you have set up the file folders from the member dashboard and have customized the "File Added" email, you are ready to upload files. There is a default tile in the Member Dashboard called "Files" that will contain any files you add to a member's dashboard.

To upload a file, go to **Administration**, then **Members**, then select "**Upload Files**". Note: to upload a file to an individual member, find that specific member and access "Add & Manage Files from the information tab.



QUICK TIP

Customize the "Files" tile in the Member Dashboard by going to Site Options, then Member Dashboard. Change the tile name or description and add a custom image.

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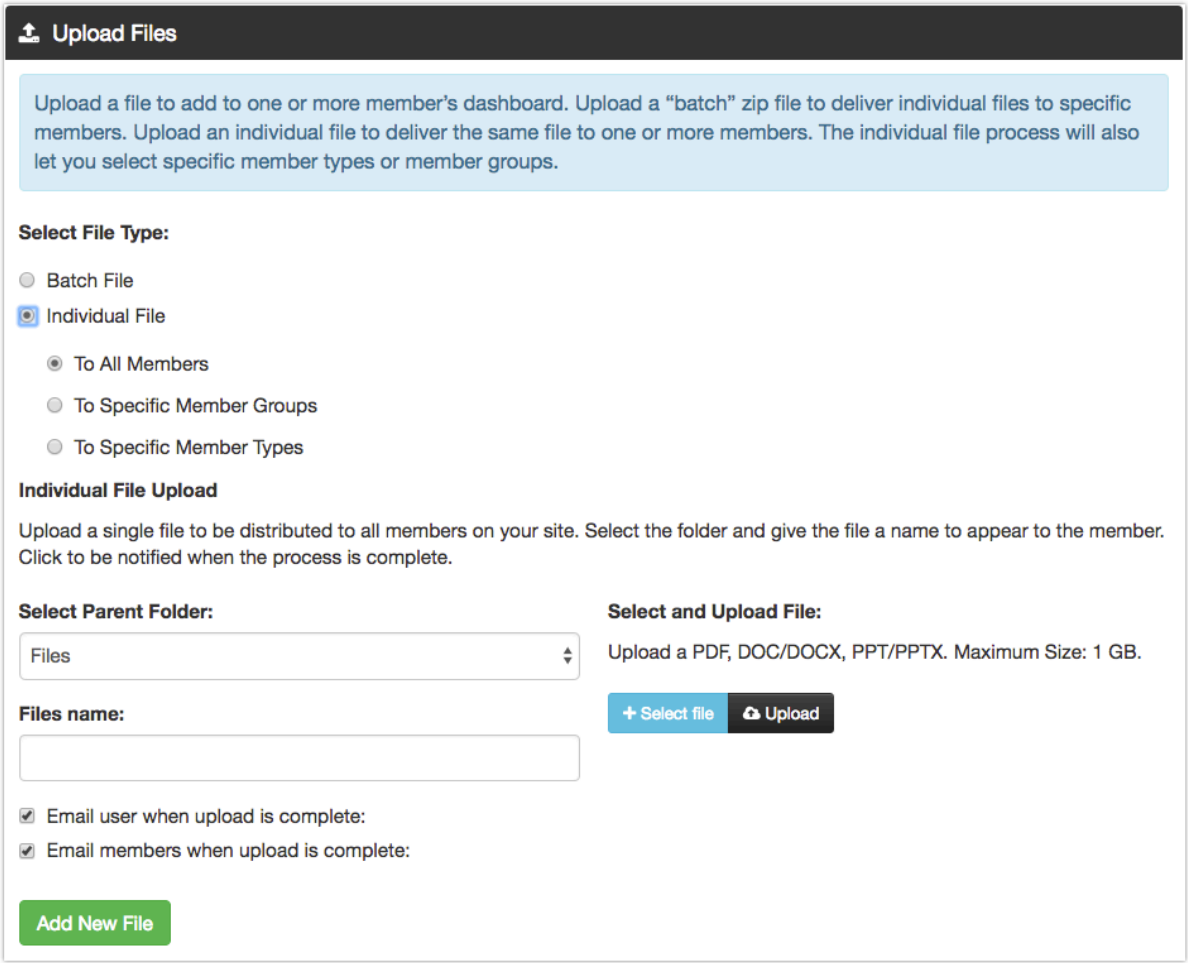
Upload an Individual File – Add to Multiple Members

To send one file out select "Individual File". Add that file to the dashboard of all members, specific member groups or specific member types. Select the folder where the file will appear inside the files tile, then give the file a name that will appear to the member. Find the file and upload it. The system will email you when the upload is complete and email the members to alert them a file is waiting.



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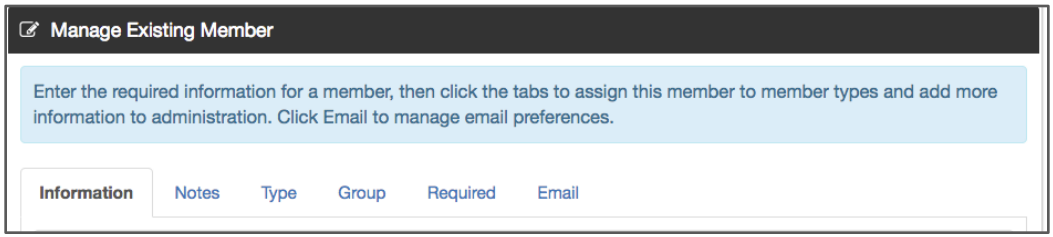
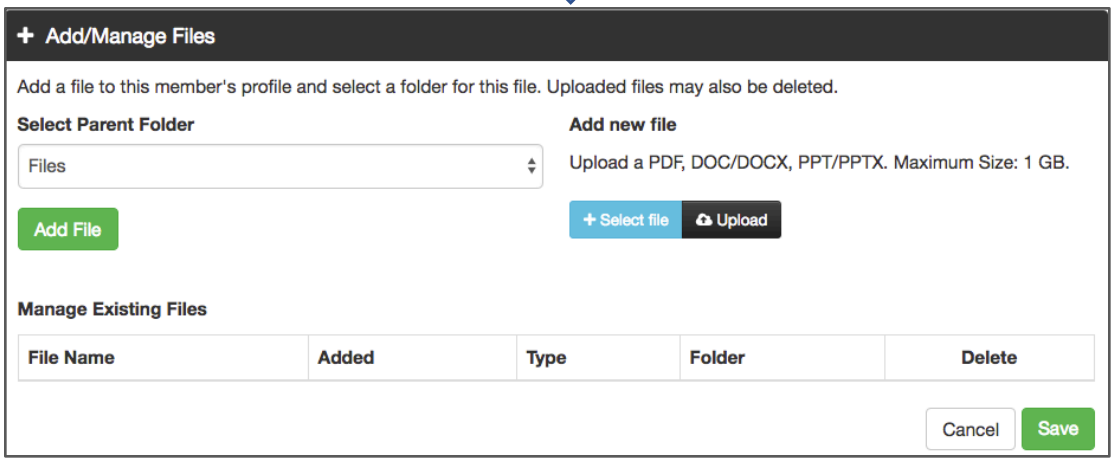
Upload an Individual File – Add to a Single Member

Once you are in Member Administration, find that member from "Manage Members". In the information tab, select "Add & Manage Files". Select the file folder the file will be added to, then find the file on your computer and click "Upload". Manage any files you have previously uploaded by finding them in the table and changing the file name, folder, or deleting the file.





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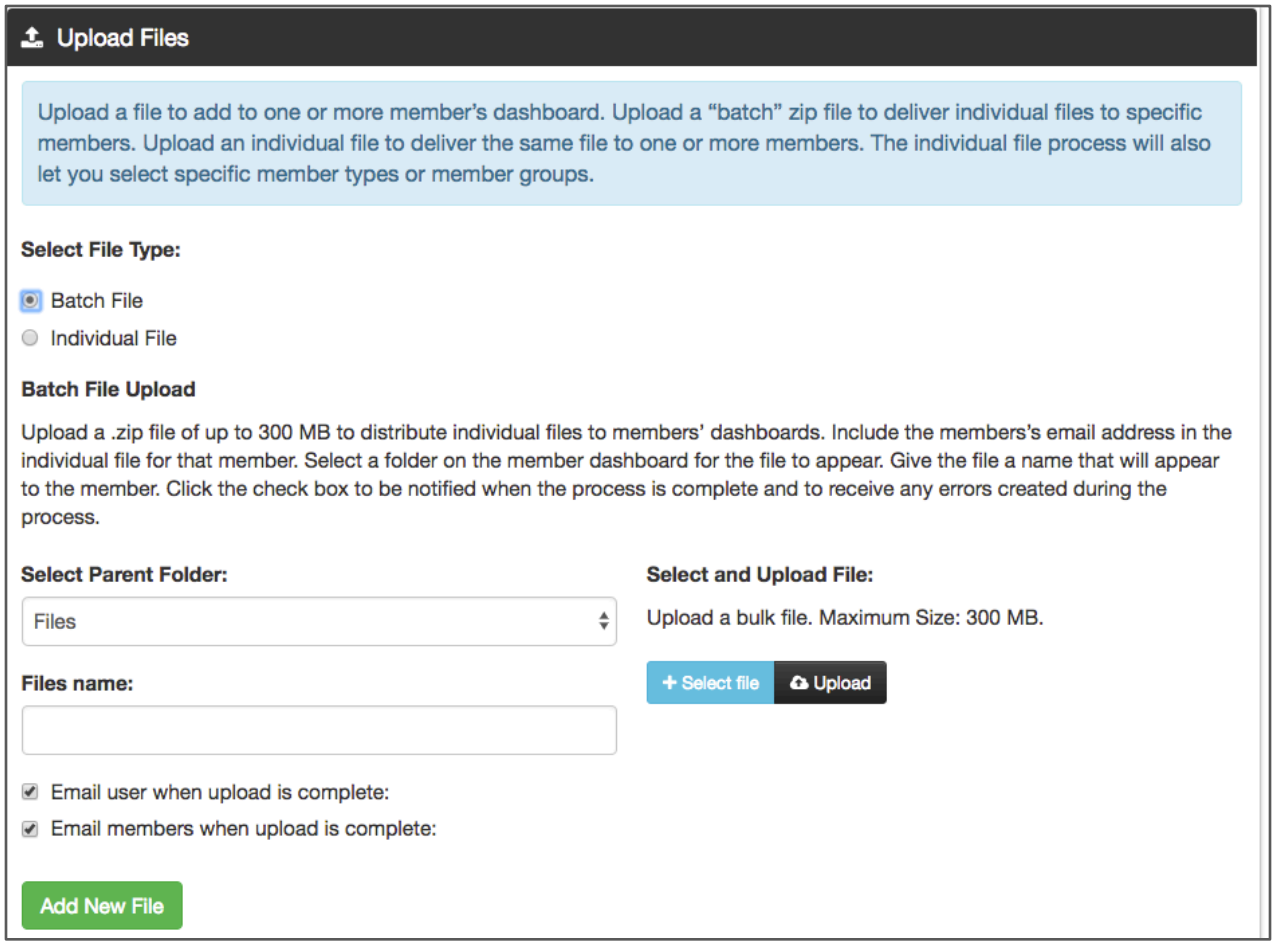
Upload a Batch File

To send different files out to members select "**Batch File**". Upload a **.zip file** and the files inside can be distributed to the dashboards of individual members. **Make sure that the member's email address is in each file name**. Select the **folder** that the file will appear and **give the file a name** that will appear in each member dashboard. Keeping "**email user**" selected will have the system email you when the upload is complete and show you any errors that occurred.



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Correcting Upload Errors

Sometimes there are errors when files are uploaded. This generally occurs in the batch upload process when individual files are delivered to multiple dashboard. Errors happen when there is no corresponding email address in the file name with an email attached to a member. To find errors, keep the "email user" selected in the upload process. The user will be emailed an error file showing any files that were not uploaded.

To correct the errors, check:

- The email address in the file name
- Add any member that was not currently in the system
- Check to see if the file name email matches the email in the member record
- Re-upload the files that were not processed during the first upload.

Uploaded Files:

File Name	Folder	Upload Type	Status	Date Uploaded	# of Members	Reports
bpalmer@conveyservices.com.pdf.zip	Files	Batch	Complete	09/24/2015	-	Files Uploaded: 1 - Download Errors: 0 - Download
bpalmer@bizyeti.com.pdf.zip	Files	Batch	Complete	09/24/2015	-	Files Uploaded: 1 - Download Errors: 0 - Download
tjennings@conveyservices.com.docx	Files	All Members	Complete	12/03/2015	21	Files Uploaded: 21 - Download Errors: 0 - Download
catalogs_2016-10-06_14-45.csv 2.zip	Files	Batch	Complete	11/11/2016	0	Files Uploaded: 0 - Download Errors: 1 - Download
Commissions Statements.zip	Files	Batch	Complete	03/16/2017	2	Files Uploaded: 2 - Download Errors: 0 - Download
Commissions Statements.zip	Files	Batch	Complete	03/16/2017	2	Files Uploaded: 2 - Download Errors: 0 - Download
Archive.zip	Files	Batch	Complete	04/12/2017	6	Files Uploaded: 6 - Download Errors: 0 - Download