

# How To Upload A File

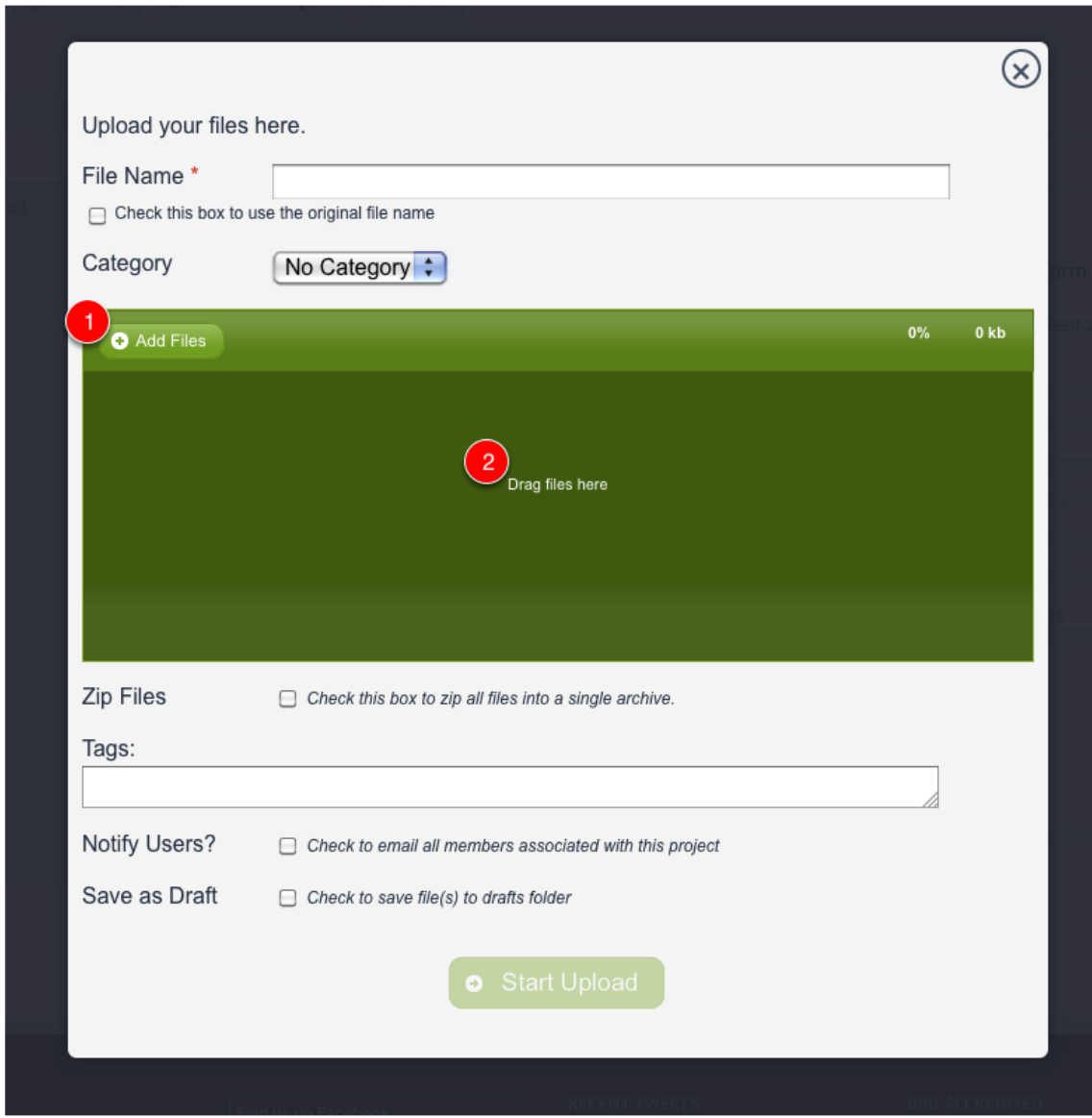
## File Manager

In File Manager Dashboard, choose ADD FILE

The screenshot shows the Pooley Accounting Services File Manager dashboard. At the top, there is a navigation bar with social media icons (Facebook, RSS, Twitter, Google+, LinkedIn) on the left and links for 'My Account', 'FAQs', 'Contact', and 'Call (314) 260-7808' on the right. Below this is the company logo 'pooley accounting services' and the tagline 'Professional Accounting and Bookkeeping Services for Small Business Owners - Since 2007'. The main dashboard area has a header with 'File Manager', 'Help', and 'Log Out' links, along with a search icon. Below the header, there are four buttons: 'Add File' (highlighted with a green box), 'Add Folder', 'Add From Dropbox', and 'Refresh'. A search bar is located below these buttons. The main content area is a large empty space with a 'Select all' checkbox and a 'Sort by: Name Date' option. On the right side, there is a 'My Account' section with links for 'File Manager', 'Help', and 'Log Out'. Below that is a 'Client Contact Form' with fields for 'Name\*', 'Email\*', 'Phone\*' (with a placeholder 'xxx-xxx-xxxx'), and a 'Comments/Questions' text area, followed by a 'Send' button.

## Upload Window

To upload a file(s), click on 1. ADD FILES or 2. Drag Files from your Desktop/Folder to Window



Upload your files here.

File Name \*

Check this box to use the original file name

Category

1  0% 0 kb

2 Drag files here

Zip Files  Check this box to zip all files into a single archive.

Tags:

Notify Users?  Check to email all members associated with this project

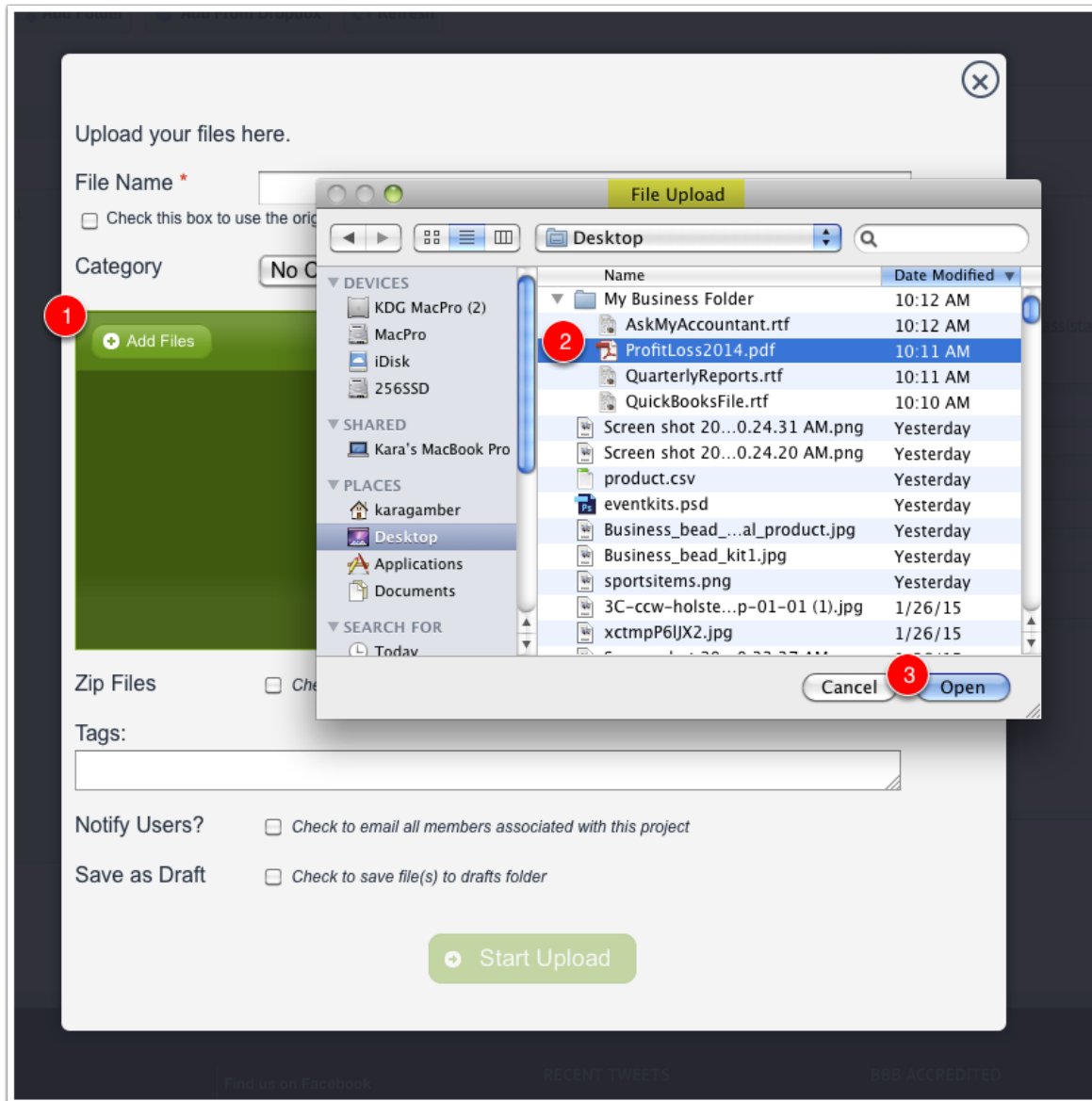
Save as Draft  Check to save file(s) to drafts folder

## Choose File

Here's an Example of ADD FILE

1. Click Add Files
2. When the File Upload window appears, Choose the File(s) you want to upload
3. Click OPEN

Note: To select Multiple Files, Hold down the SHIFT BUTTON while Clicking on each File



## Choose Options

Back at the Upload Window, note your selected File is there.  
Next, choose Upload Options:

1. Naming
2. Category
3. Zip Files (a great option if you have multiple files or if the files are large)
4. Notify with optional send to group.
5. Save as Draft
6. Start Upload

The screenshot shows a file upload interface with the following elements and callouts:

- 1**: File Name \* . Below it is a checked checkbox:  Check this box to use the original file name.
- 2**: Category
- 3**: Zip Files  Check this box to zip all files into a single archive.
- 4**: Notify Users?  Check to email all members associated with this project.
- 5**: Save as Draft  Check to save file(s) to drafts folder.
- 6**:


The interface also includes a progress bar showing "1 files queued" with "0%" progress and "2 kb" size. A file named "ProfitLoss2014.pdf" is listed with "2 kb" size. A text area for "Message to send to group (optional)" is present. A "Drag files here" area is also visible.

## Upload Complete

f    RSS    Twitter    G+    in


My Account    FAQs    Contact    Call (314) 260-7808

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Professional Accounting and Bookkeeping  
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—Since 2007



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File Manager    Help    Log Out    


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Search:

Home »

With Selected:   

Select all    Sort by: Name Date



2015-01-28-admin-profitloss2014.pdf

### My Account

- > File Manager
- > Help
- > Log Out

### Client Contact Form

Let us know if you need assistance

Name\*

Email\*

Phone\*

Comments/Questions