

CoActiveSoft Document and Contract Management User Manual

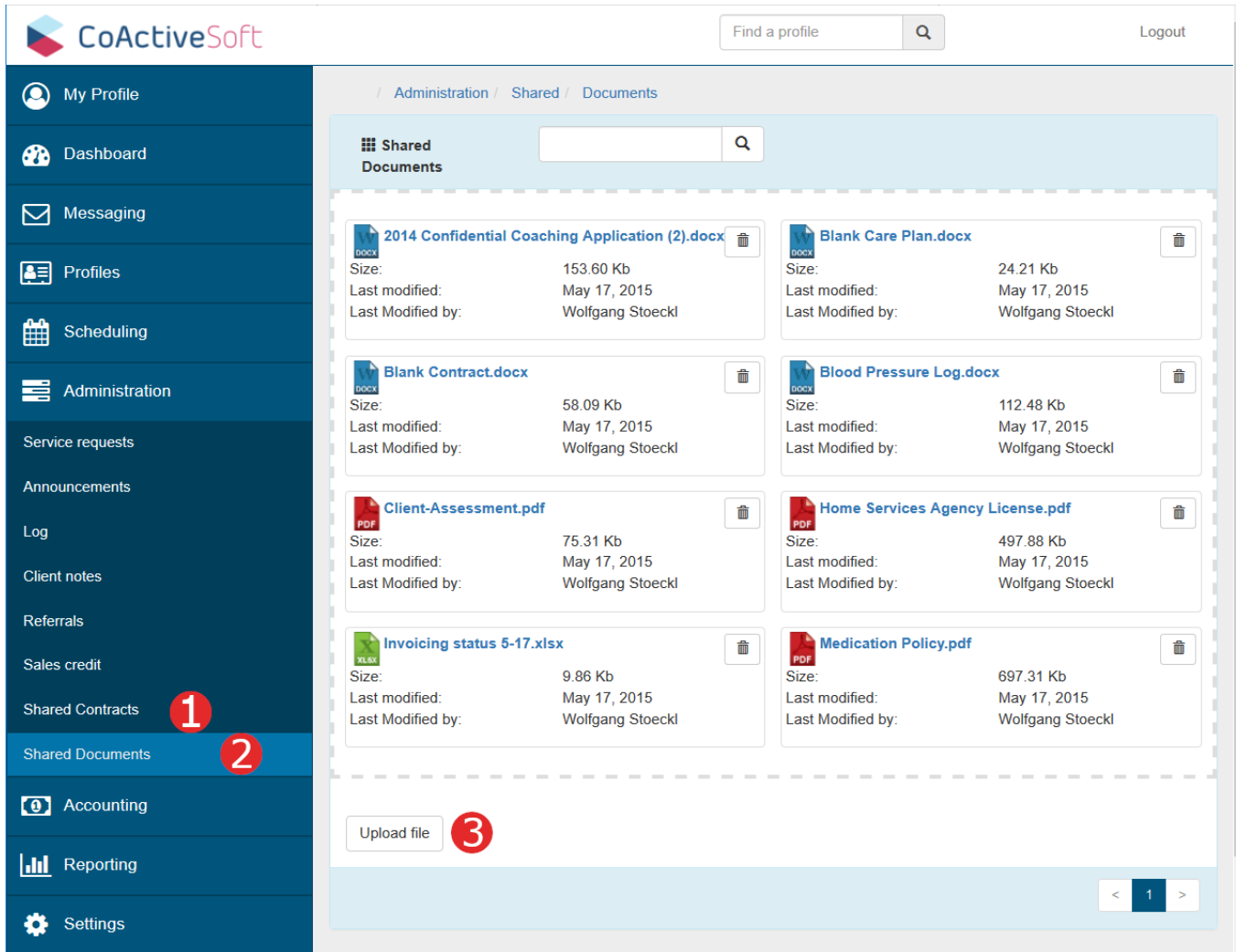
These two features are grouped together in this document because they function in the same way. Look for 'Shared Documents' (2) and 'Shared Contracts' (1) in the 'Administration' menu to get started. These sections allow you to upload and store documents. Simply click on the upload button (3) in the document/contract section to select a file from your computer, or, even simpler, drag the file into the section. The only difference between the document and the contract section is that users need to have administrative privileges to access the contracts section.

Documents can be uploaded for a specific profile (Figure 2), or for the entire company (Figure 1).



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Solutions for Service Providers

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(Figure 1) Main Menu

Like logs, documents and contracts can be found in the administration page and in the profile, under the 'Operations' tab (Figure 2, 1). However, unlike logs, you will not find any document you upload through the administration page on any profile. On the administration page, the documents/contracts are usually templates that you modify to be used with a customer, patient, etc. Under the profiles, you store profile-specific documents.



Sue Adler



Address Show on map 

Phone
Email ryan.olmstead@coactivesoft.com
Category Client

Tags

▲ Open service requests

Scheduling | **Operations** | Medical | Management | Forms | Associations | Marketing

\$ View invoices

Requested service requests

Log




Client notes

Notes




Contracts **1**

Documents

📄 WelchAllyn Aneroid Sphygmomanometer - Service manual.pdf **2**

4
  
2 **3**

Upload file


 Delete profile  Clone profile  Back

(Figure 2) Profile Management

The 'Contracts' and 'Documents' sections look and function virtually identical (1). In this section it is possible to download and edit the contract or document (2). To the right of the file, it is also possible to delete the uploaded file from CoActiveSoft. It is also possible to share the document with other users in CoActiveSoft. By clicking on the share button (4), the 'Share document' window is opened:

✕

Share document

Shared with			
Name	Can view	Can edit	
Sue Adler	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Cancel **Save**



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In this window, you can add more people to share the specified document inside of CoActiveSoft using the search box at the bottom. You can also determine whether or not the profiles specified can edit the document using the 'Can view' and 'Can edit' check boxes. Selecting the 'Can edit' check box allows any profile with this privilege to edit as well as delete the document. Remove document privileges by clicking on the red X button to the right.

In order to access the documents uploaded in or shared with the profile, you have to be able to access the profile itself to see the documents.

Caregivers can view all the documents in all the profiles they access, no matter the designated privileges.



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