

Document Management

Overview

Every module in picturemaxx Backstage has a **Templates > Document Management** area, where you can upload and organize your files. Additionally, there is the **Document Management** tab in the records in Sales, Purchasing, and Administration modules tailored to the module-specific needs.

Document Management is where you build your customized file storage, for example:

- Media: Manage ICC profiles to make available within specific actions.
- Sales: Store general price lists.
- Purchasing: Maintain press credentials and standard contracts.
- Marketing: Upload flyers and corporate presentations.
- Web: Upload logos, team photos, reference scans, or PDF documents to feature on your website.
- Finance: Provide files to import payment data.
- Administration: Save you company logo for corporate data and your system's logo line.

Files you upload to a Document Management area become available within the relevant module's features. Before you start, design a file structure that makes files easy to find — especially when you need them in other contexts.

Templates / Document Management

▼ Folders

IT

IT

▼ Logo

▼ Watermark

▼ Video

preview

thumb

Please note that when renaming a folder, its file path changes and file associations (eg images in a web article) linked to it will not be correct anymore.

▼ Document Management

Edit ▼ Upload Files

Search: Filename

Q

Preview	Filename	File Size	Date Last Changed
picturemaxx	watermark_p_780x520.png	41836	25.03.2020 10:51:30
picturemaxx	watermark_p_800x400.png	38368	25.03.2020 10:51:30
picturemaxx	watermark_p_800x480.png	39135	25.03.2020 10:51:31

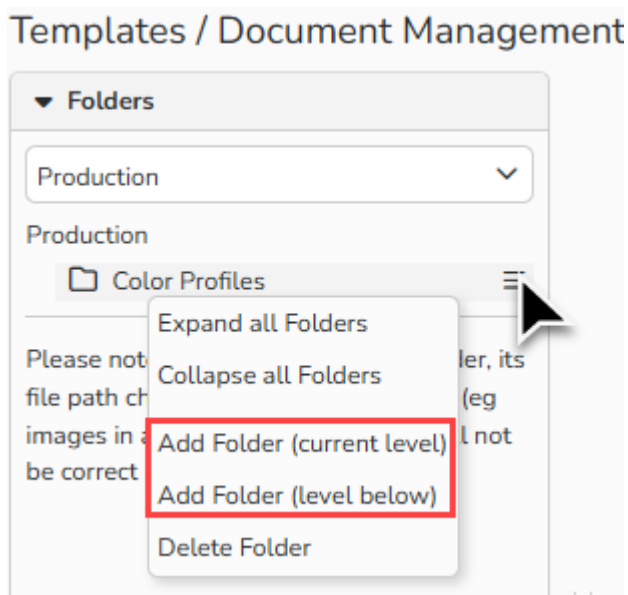
Administration module: Document Management

Add folders to organize uploaded files

Within any a Backstage module, access Document Management to create and manage multiple-level folder structures for uploaded files.

Create Folder

1. Navigate to a corresponding module (Sales, Purchasing, or Administration) > **Templates** > **Document Management**.
2. In the Document Management window, right-click an existing folder to access its context menu.
3. Select **Add Folder (current level)/ Add Folder (level below)**.
4. You can show or hide all folders with a single click with **Expand all Folders / Collapse all Folders** in the context menu.



Document Management window: Folder context menu

Rename Folder

1. Navigate to a corresponding module (Sales, Purchasing, or Administration) > **Templates** > **Document Management**.
2. In the Document Management window, double-click a folder's name, type a new name, and then press **Enter**.

Important

When you rename a folder, you need to update any existing links to its contents. These links rely on the full folder path, so changing the name can break the connection.

Delete Folder

1. Navigate to a corresponding module (Sales, Purchasing, or Administration) > **Templates** > **Document Management**.
2. In the Document Management window, right-click a folder and select **Delete Folder** from the context menu.

Note

You can delete only empty folders. First remove the folder's contents.

Upload files

With the built-in upload feature in Backstage, you can easily upload files to Document Management in a relevant system area.

To upload files to a Document Management folder, proceed as follows:

1. Navigate to a corresponding module (Sales, Purchasing, or Administration) > **Templates** > **Document Management**.
2. In the Document Management window, open the folder where you want to upload the file.
3. Click **Upload Files**. In the upload file dialog:
 1. Click **Add Files** to locate files on your computer.
 - You can also drag-and-drop the files directly from your Explorer (Windows) or Finder (Mac) into the upload area.
 2. Click **Upload All Files**.
 3. After the upload completes, click **Back to Overview**.

Templates / Document Management

▼ Folders

Production ▼

Production

- ColorProfiles
- SVG-Test

Please note that when renaming a folder, its file path changes and file associations (eg images in a web article) linked to it will not

▼ Document Management

Edit ▼ Upload Files

Search: Filename 🔍

Preview	Filename	File Size	Date Last Changed
	Dot Gain 15%.icc	912	10.03.2021 15:04:27

Document Management: Upload files