Prospect Documents

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The Documents form is displayed on the Prospect toolbar once the Prospect form has been saved.

Your company must be a subscriber to the add-on module SedonaDocs to be able to scan and attach or attach an existing document to a Prospect record.

Once the Prospect form has been saved, you may click the Documents button on the Prospect Toolbar. To attach a document to the Prospect record, click the New button located at the lower right of the form then click Add or Scan button.

The process for adding an existing document or scanning a new document is the same as the functionality for General Documents.

For detailed instruction on scanning and attaching or attaching an existing document to the Prospect, follow the links below.

Add Existing Document

Scan New Document