

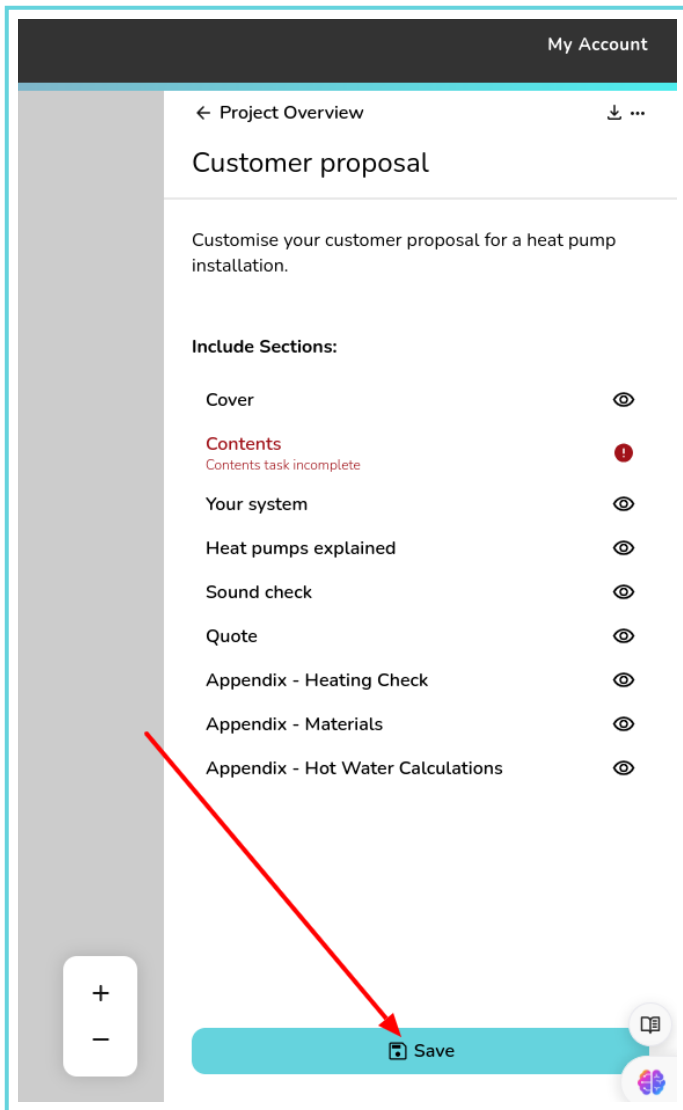
Document Management

The document management section can be found at the bottom of the project overview. It allows you to keep track of all the documents you need for a project in one place.

The screenshot displays the HEATPUNK project overview interface. The top navigation bar includes 'HEATPUNK', 'Projects', 'Tasks', 'Components', 'Forms', 'Reports', and 'Help'. The left sidebar shows a date 'Fri Dec 15 2023', project details for 'MKM' (HU8 8DE), and a list of menu items: 'Plans', 'Heat pump', 'Performance', 'Financial', and 'Surveys'. The main content area is divided into several sections: a floor plan diagram, a 'Forms' section with 'Incomplete Forms' (Compliance Certificate, DNO Commissioning Form, DNO application via Connect Direct, Customer proposal), a 'Documents' section (highlighted with a red box) featuring an 'Upload' button and a 'Reports' section with icons for 'MCS Compliance...', 'DNO commissioni...', 'Heat Pump Project...', 'Heat Pump Survey', 'ENA Connect Direct', and 'See All', and a right-hand sidebar with 'DNO Application' and 'Emails' (Quotation, DNO, ENA Connect, Handover). A banner at the bottom left promotes 'SOLAR PANELS' and 'Heat pumps, and more!'.

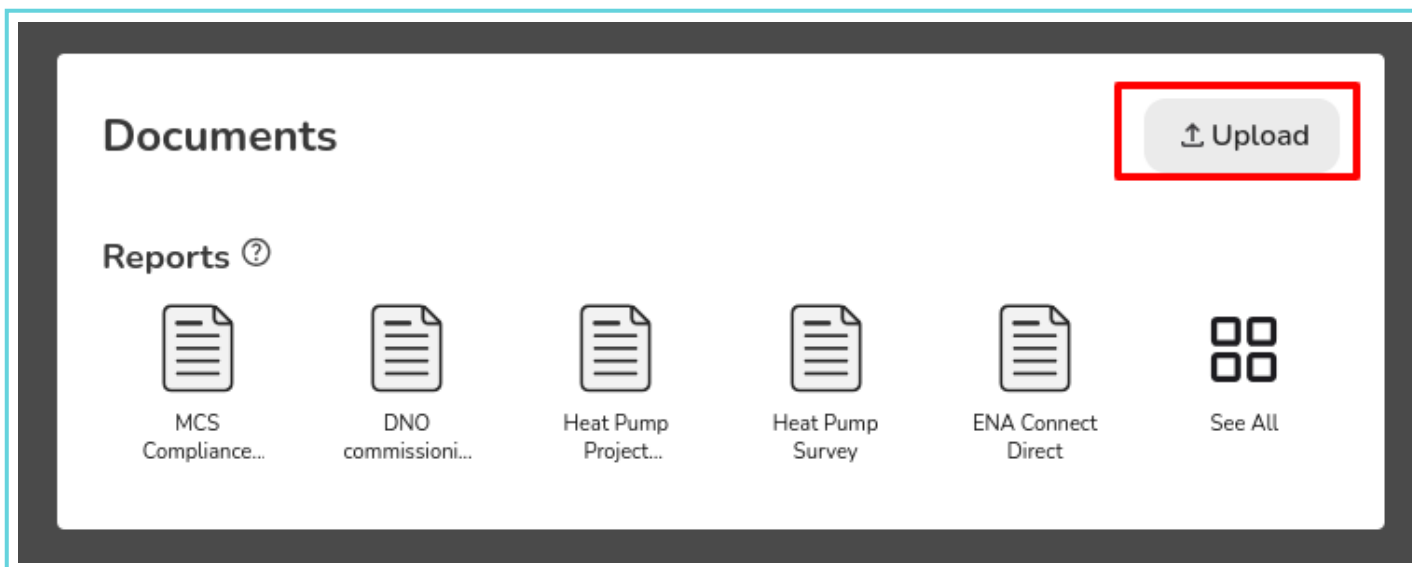
Saving a Heatpunk report to the document manager

Let's use the quote as an example of how to save a document to the document management section. When previewing the customer proposal report, you will see a **menu on the right-hand side with a save button at the bottom**. After clicking the save button, you can go back to the Project Overview and see that the quote has been saved to the document section.



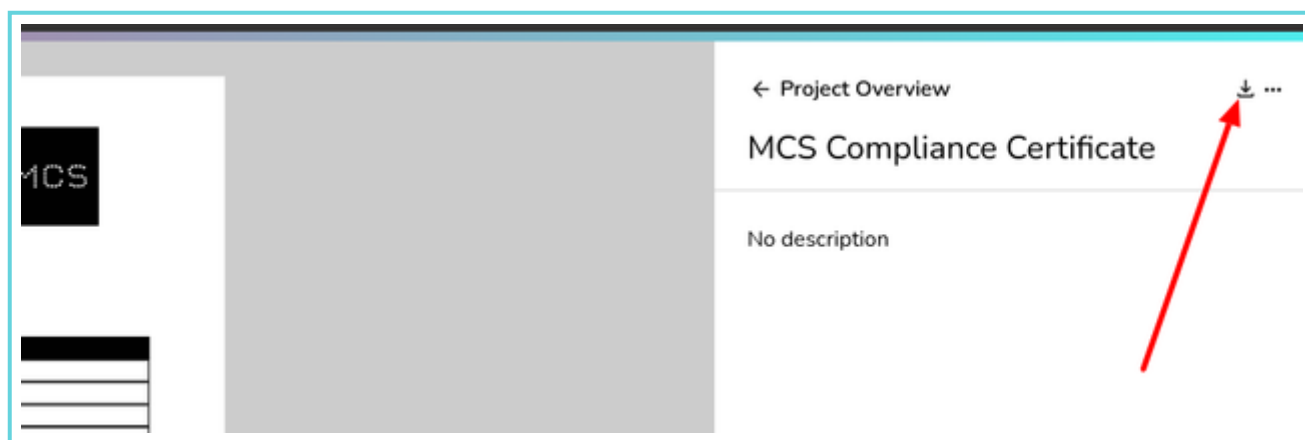
Upload a document from your device

To upload a document from your device, **click the Upload button**. Then drag and drop the file, or use the **Upload File** button to find the document you wish to upload.



View, rename, download, or delete files you've saved to your project

If you'd like to download any of the files you've added to your project, go to the relevant document and click the **Download** button.

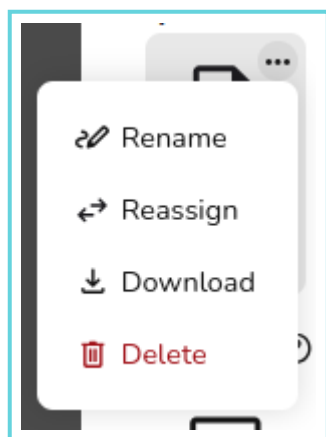


You can change the name of a file you have uploaded by clicking the three dots and choosing **Rename**.

To categorise your saved files, click the three dots and select **Reassign**.

To download one of your saved files, click the three dots and select **Download**.

To delete a document, click the three dots and then **Delete**. This will delete the saved version of the document from the file management section of your project.



Revision #1

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