

# Document Management

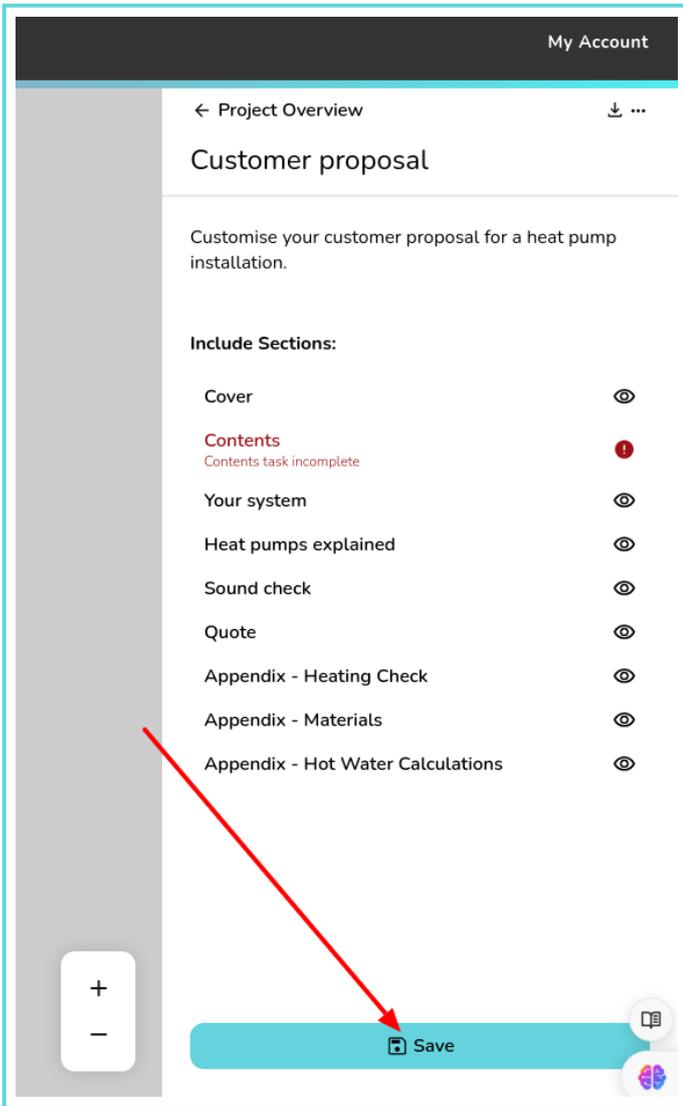
The document management section can be found at the bottom of the project overview. It allows you to keep track of all the documents you need for a project in one place.

The screenshot displays the HEATPUNK project overview interface. The top navigation bar includes 'HEATPUNK', 'Projects', 'Tasks', 'Components', 'Forms', 'Reports', and 'Help'. The main content area is divided into several sections:

- Left Sidebar:** Contains project details such as 'Please select...', 'Fri Dec 15 2023', 'HU8 BDE', and contact information for MKM (01844 896444, fio.osmani@mkms.co.uk). It also lists navigation options: Plans, Heat pump, Performance, Financial, and Surveys.
- Top Center:** Shows a floor plan diagram with 'First floor' and 'Ground floor' labels.
- Top Right:** Displays a Samsung heat pump unit with technical specifications: ENA Registration Number: SAMSG09641V1, Sound Power Level: 61.0 dB, Nominal Output: 5.00kW, Proposed Flow Temperature: 44°C, Heating SCOP at 44°C: 3.63, and Actual Output at 44°C: 4579kW.
- Middle Right:** Features a 'DNO Application' section with a 'Blank En' button.
- Bottom Right:** Includes an 'Emails' section with a 'Blank En' button and a list of email categories: Quotation, DNO, ENA Connect, and Handover.
- Bottom Center (Highlighted):** The 'Documents' section is highlighted with a red box. It includes an 'Upload' button and a 'Reports' section with icons for MCS Compliance, DNO commissioning, Heat Pump Project, Heat Pump Survey, ENA Connect Direct, and a 'See All' button.

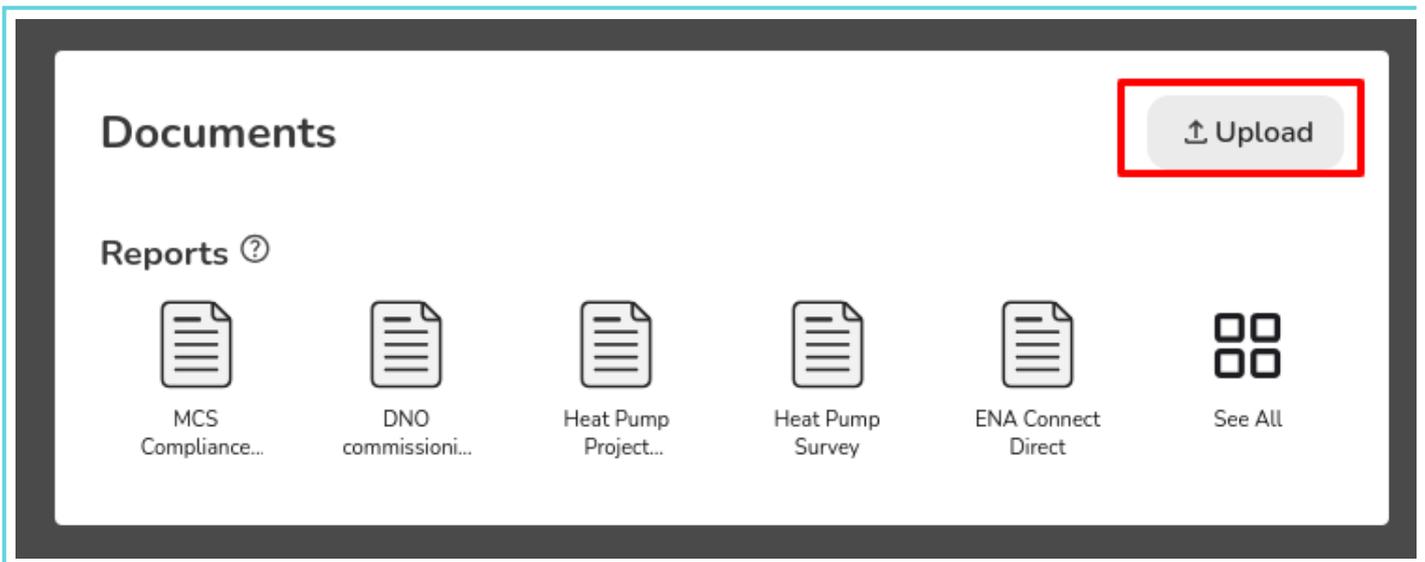
## Saving a Heatpunk report to the document manager

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.



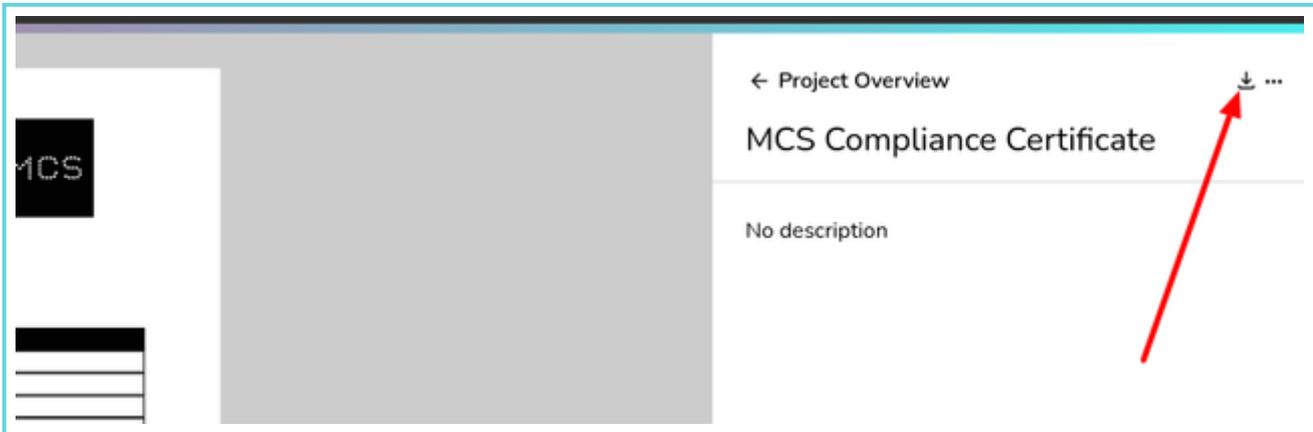
## Upload a document from your device

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.

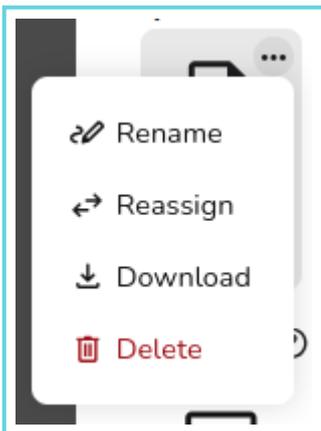


You can change the name of a file you have uploaded by clicking the three dots and choosing **Rename**.

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.



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Revision #1

Created 13 November 2024 12:06:30 by Harry Doyle

Updated 15 May 2025 16:31:12 by Harry Doyle