Knowledge Base Article

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Article ID: **4215**
Subject: **Document Sharing in Pro Gold i2**
Last Modified: **November 28, 2008**

Applies to: **Pro Gold i2 2.0, 3.0**

Issue: Documents can be uploaded to a property record and shared with agents (only available with Agent Connector) in Pro Gold i2. Document sharing is located within each property record. Note: There is an additional cost associated with Document Sharing. Refer to the Pricing and FAQ link within the Document Storage Terms of Use for more information. **(Note: Document sharing is for ease of access and communication with the agent; not permanent vaulted storage)**

Resolution: Actions required to share documents:

- Go to the main **Properties Tab**
- Select **Work with Properties** icon.
- Use the **Find** button to retrieve the desired record
- In the **Property Tab**, select the **Document Storage** button.
    - Note: Before a document can be shared, the document sharing option for the property must be activated.
    - If the **Document Storage** button is **RED**, activation is required.
        - Click on the button and review the Terms of Use.
        - Select the option to Accept Terms and click the "**Submit Terms**" button to activate the Document Storage option for this property.
    - If the **Document Storage** button is **GREEN**, the terms have already been accepted and the button is ready for use.
- The Document loading screen will appear.
- Documents that have already been uploaded appear on the right side of the screen and can be viewed by clicking the "**View**" button.
- To upload a document, select the "**Browse**" button, select the appropriate document, and enter the name of the document in the "**Document Name**" field.
    - Almost any type of file can be loaded into Document Sharing and Pro Gold i2 will convert it to a PDF file.
    - To share a paper document, scan the document and save it to a well known location before accessing the Document Sharing option within Pro Gold i2.
- Close the **Document Storage** screen.
- Note: With **Agent Connector**, agents can have access to documents saved in Document Sharing. Agents can also save documents to the property record as well and share them with the office.

References: Below is a link you can use to access Enhancement HelpNet Center resources, which includes the Knowledge Base Article (KBA) Library, Pro Gold i2 Documentation, and Training Webcasts:

http://secured.progoldi2.com/webcast.aspx

- The Enhancement HelpNet links are located on the right side of the web page.

Related articles: N/A

Keywords: Docs Sharing, Store Documents, Share, 4215