

Product Troubleshooting - Sales Automation - Documents section

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When a SedonaOffice Sales Automation customers go live, the documents section needs to be enabled for the customer, otherwise, they will not be able to upload documents to proposals. If it is not enabled, there is no way for the customer to do this themselves.

To correct this issue, the following needs done.

- 1) Log into Sales Automation for Dealer 10830 from Host
- 2) Click on your name
- 3) Click on Setup
- 4) Click on Users
- 5) Click on the User in question in blue
- 6) Checkmark the checkboxes under the Documents permission and save.
- 7) The next time the SO SA User logs in, this permission will take effect and they will be able to upload documents to a proposal