

Attachments / Documents

- [Service Description Attachments](#)
 - [Attachments / Documents](#)
- [Backend Settings NextCloud](#)
 - [NextCloud Integration](#)

Service Description Attachments

Attachments / Documents

Title	Widget	Widget Description
Documents		<p>1. Number of files</p> <p>Click: Opens the summary page</p> <p>Available on:</p> <ul style="list-style-type: none"> • Dashboard • Customer details page • Opportunities • Leads • Product details page
Attachments		<p>1. Number of files</p> <p>Click: Opens the summary page</p> <p>Available on:</p> <ul style="list-style-type: none"> • ORDER • Activities • Quotation

General

Functions in the title bar

Icon	Explanation
+	Files can only be added in ORDER, Opportunities, Leads and in own Activities.

Grid

Click	Swipe	General Information
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Open file	1. Delete File	<ul style="list-style-type: none">• The grid shows files and folders.• Folders have no Created by, File size or Date.• When in a subfolder, no name is shown for switching to the parent folder.
Only in ORDER and in own Activities is an edited file updated	Files can only be deleted in ORDER and in own Activities.	

Column definition

Name	Visible	Sort	Full Text	Explanation
Icon	ForceVisible			Folder, if it is a subfolder. Arrow, if it leads to a parent folder.
Name	Visible	ASC	Yes	Contains the file or folder name.
Size	VisibleOnlyLandscape			Including unit KB, MB or GB
Attached on	Hidden			

FAQ

Release

Backend Settings NextCloud

NextCloud Integration

Online Files

Employee and Customer files can be imported via API from the NextCloud system.

It should be noted that the files are provided online and are not uploaded to the DeDeSales server.

Settings

Call up Basic configuration - Settings - NextCloud Integration

Enter the data and Save. As soon as a file is opened in the client, it is streamed to the client.

General Information

Parallel use of offline and online files is not possible.