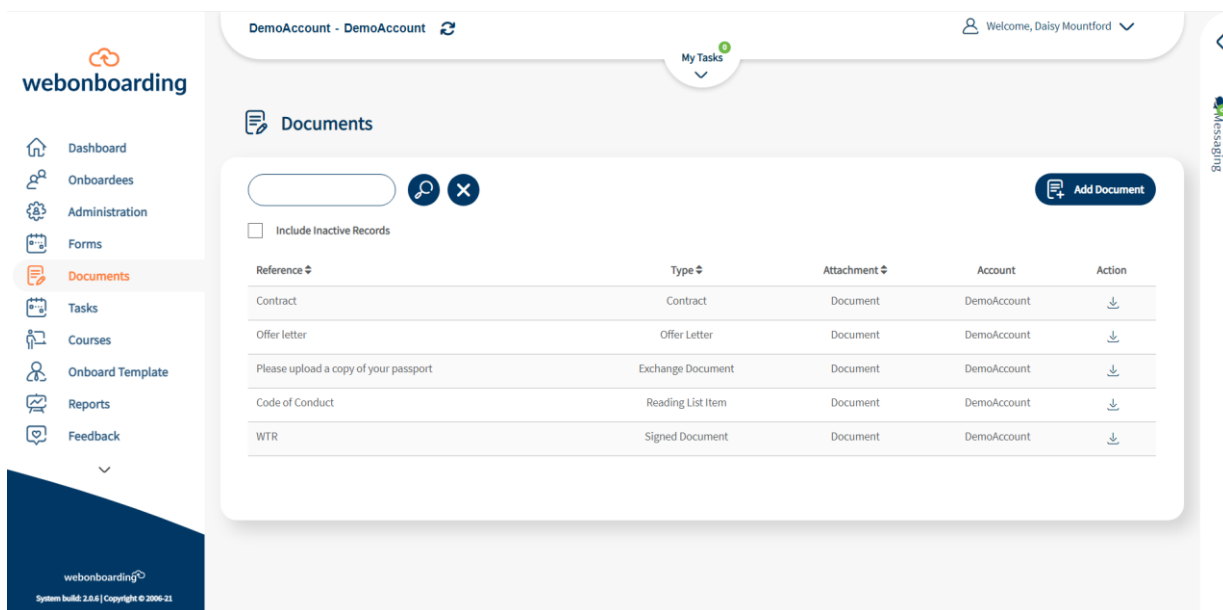


## Adding Exchange Documents

Initial creation of documents may be done by your implementation consultant, however, should you need to upload any new Exchange Documents you can do so. Exchange Documents are ideal for documents which you either want the Onboarder to upload into the system OR want the Onboarder to download and complete and reupload to the system. If the document is a form that you want Onboarders to complete we suggest using the Forms section as best practice. For more details on Forms see the [Forms guide here](#).

Click documents on left-hand side of the screen.



You can then click “add document”.



If “Exchange Document” is selected as the Document Type , then some additional options display on the screen.

The screenshot shows a web form titled "Documents > New". At the top, there are navigation buttons: "Back", "Undo", and "Save". Below these are two tabs: "General" (selected) and "Companies". The "General" section contains the following fields:

- Reference \***: A text input field containing "Exchange Document".
- Description \***: A text input field containing "Exchange Document".
- Document Type \***: A dropdown menu with "Exchange Document" selected.
- SubType \***: A dropdown menu with a downward arrow.
- Mandatory**: A checkbox that is currently unchecked.

The "Attachment" section contains:

- File**: A file input field with a "Choose file" button and a "Remove file" button with an information icon.

The "Additional Information" section contains a large, empty text area.

You will need to select one of the Sub Types:

Sub-Type	Description
Upload	These documents will ask Onboardees to upload a requested document from their device.
Download	These documents will provide a downloadable template and ask Onboardees to complete it and upload it.
Link	This will provide Onboardees with a web link to navigate to.

Where possible we suggest that Download documents are not Word files to complete as mobile and tablet devices often corrupt the formatting. Where possible use PDFs or alternatively our Forms section.

If the document is mandatory then select the Mandatory check box. Onboardees will need to complete mandatory documents in order to complete this stage of the process.

**Mandatory**

Download documents will require a file to be uploaded to the system.

Attachment

File

 Choose file

 Remove file



Links will need a URL added. Please note that Links cannot be mandatory.

Attachment

Web Link



You can also add additional information to instruct Onboardees what to do with these Documents in the Additional Information box. This information is limited to 500 characters and will display when the Onboardees click or press on the 'i' icon in this section of their process.

Additional Information

Ensure that the Status is set to Active, this ensures that the new document is available for use.

**Status**

Active

Inactive

Active

Now use the companies tab at the top of the page to select the Companies in Webonboarding that will have access to this document.

Click Save.