

Manage Documents and Notes

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You can upload documents, such as equipment manuals and purchase orders, and add notes to a line item to help people use the inventory correctly.

Note: The maximum file size is 10MB.

Documents and notes are managed through the line item, in the Documents/Notes drawer. If needed, you can upload multiple documents at the same time. To do this, hold down the **SHIFT** key as you click multiple adjacent documents or hold down the **CTRL** key as you click multiple nonadjacent documents. Uploaded documents appear in a list.

To add a document

1. On the **Inventory** tab, click **Manage Inventory**. The *Manage Inventory* page opens.
2. Click **change location**. The domain hierarchy window opens.
3. Locate and select the sub location.
4. Locate and click the item or kit you want to update. The item's page opens.
5. Click the **Documents/Notes** drawer.
6. Click **Add**.
7. Click **Select files**. Your browser's **Open** window opens.
8. Navigate to and click the documents and notes you want to upload.
9. Click **Open**. The window closes and the name of the document appears in the drawer.
Tip: If you selected the wrong document, click **Clear** to remove it.
10. Click **Upload**. The name of the document appears in the list.

To add a note

1. On the **Inventory** tab, click **Manage Inventory**. The *Manage Inventory* page opens.
2. Click **change location**. The domain hierarchy window opens.
3. Locate and select the sub location.
4. Locate and click the item or kit you want to update. The item's page opens.
5. Click the **Documents/Notes** drawer.
6. In the **Notes** area, enter your note or comment.
7. Click **Save**.

To remove a document

1. On the **Inventory** tab, click **Manage Inventory**. The *Manage Inventory* page opens.
2. Click **change location**. The domain hierarchy window opens.
3. Locate and select the sub location.
4. Locate and click the item or kit you want to update. The item's page opens.
5. Click the **Documents/Notes** drawer.
6. In the list of documents, locate the appropriate document and, on that row, select the check box in **Remove**.
7. Click **Remove**.

To remove a note

1. On the **Inventory** tab, click **Manage Inventory**. The *Manage Inventory* page opens.
2. Click **change location**. The domain hierarchy window opens.
3. Locate and select the sub location.
4. Locate and click the item or kit you want to update. The item's page opens.
5. Click the **Documents/Notes** drawer.
6. In the **Notes** window, update or delete your note.
7. Click **Save**.