

Introduction

Gold-Vision stores your templates in a central location in a folder structure.

Customer documents are also stored in this location, in a separate folder for each Account.

This guide provides instructions for connecting to these folders so that you can amend and update your templates or add documents directly to Accounts.

This guide is for hosted customers only (on premise customers will have the same folders but stored on a shared network location).

Map a Network Drive

Windows 7

1. Open Computer by clicking the Start button and then clicking Computer.
2. Click the Tools menu, and then click Map Network Drive. ...
3. In the Drive list, click a drive letter. ...
4. In the Folder box, type the path of the folder
5. Click Finish.

Windows 8

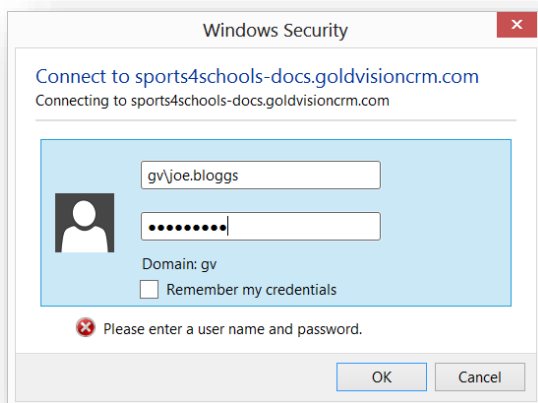
1. From the desktop, open Computer (might be called This PC)
2. Select the Computer tab and select Map network drive
3. Choose a drive letter and enter the folder path
4. Click Finish

Folder Path

The folder path will be in the following format replacing xxx with your Gold-Vision address. E.g. <https://xxx.goldvisioncrm.com> becomes:

<https://xxx-docs.goldvisioncrm.com>

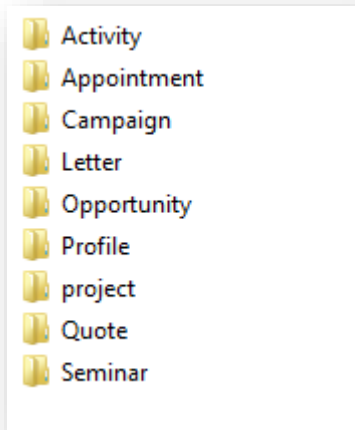
When prompted, add in your username and password



This will map the network drive, which you can browse from My Computer or Windows Explorer.

Template Folders

Templates are stored in a folder called **GVTemplates** and then within sub-folders depending on the type of template. The Letters folder has two sub-folders for Accounts and Contacts.



Your labels within Gold-Vision may have been amended (e.g. Accounts may be called Companies) but these folder names must keep their default naming convention.

Preventing Login Prompts

Reconnect Document Storage

When you restart your machine or PC the connection will disconnect, when you log back on to the machine you will see the location in My Computer with a red cross associated – double click – enter your Gold-Vision username and password and this will reconnect the access.

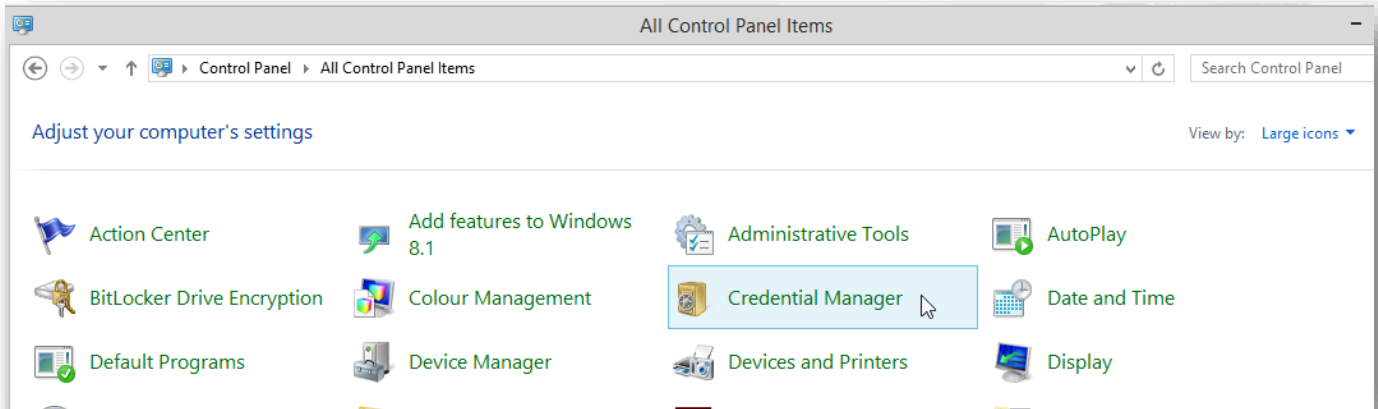
Trusted Sites

Add Document location to Trusted Sites.

1. Open Internet Explorer:
 - Click Tools
 - Internet Options
 - Security
 - Trusted Sites
 - Sites
2. Enter the URL - https://*.goldvisioncrm.com/
3. Add and close
4. Click Custom Level
5. Scroll to bottom and check the option 'Automatic Logon with current username and password'
6. Close and click OK

Credential Manager

Store the credentials in order to prevent constant password prompts.



1. Open Control Panel
2. Select Credential Manager
 - You may need to change the 'View By' to see this
3. Windows Credentials
4. Add a Windows Credential
5. Type *.goldvisioncrm.com
6. Enter Gold-Vision Username and Password and click OK

Type the address of the website or network location and your credentials

Make sure that the user name and password that you type can be used to access the location.

Internet or network address
(e.g. myserver, server.company.com):

User name:

Password: