Manage files

A file bundles all conversations, reports and tasks around one customer or topic. Users create files themselves in the app; in the Admin Center you manage ALL files of your organization, including those of colleagues.



The file overview. For each file you see the owner and four actions on the right: manage members, manage teams, edit and delete.

Create a file

1. Open Files

   Click on **Files** in the left menu. Use the search field to quickly find a file.

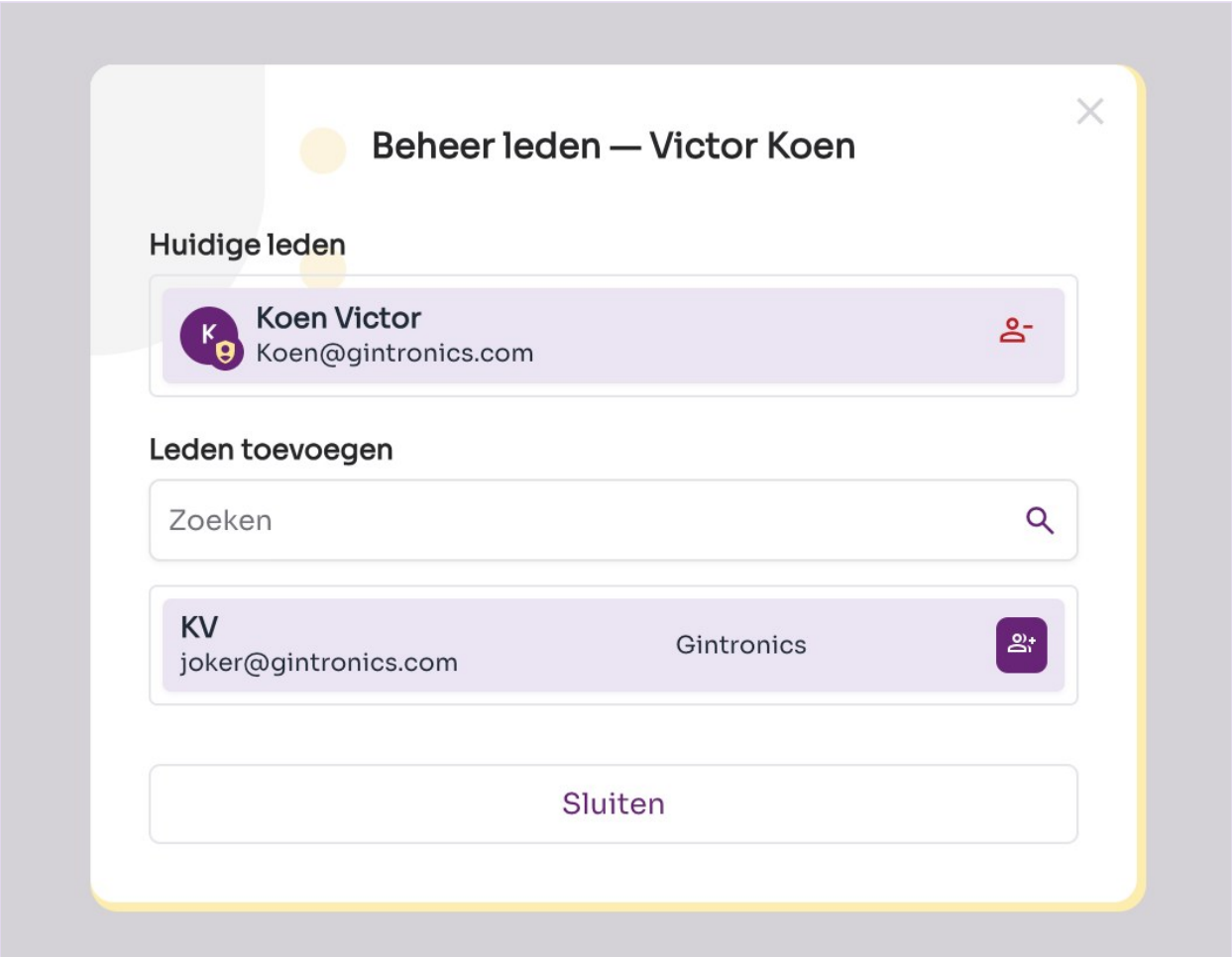
2. Click Add

   Enter a **title** (required) and optionally a **description**. Click **Save**.

Give users access to a file

1. Click Manage members

   That is the first icon (a person) on the right in the file's row.

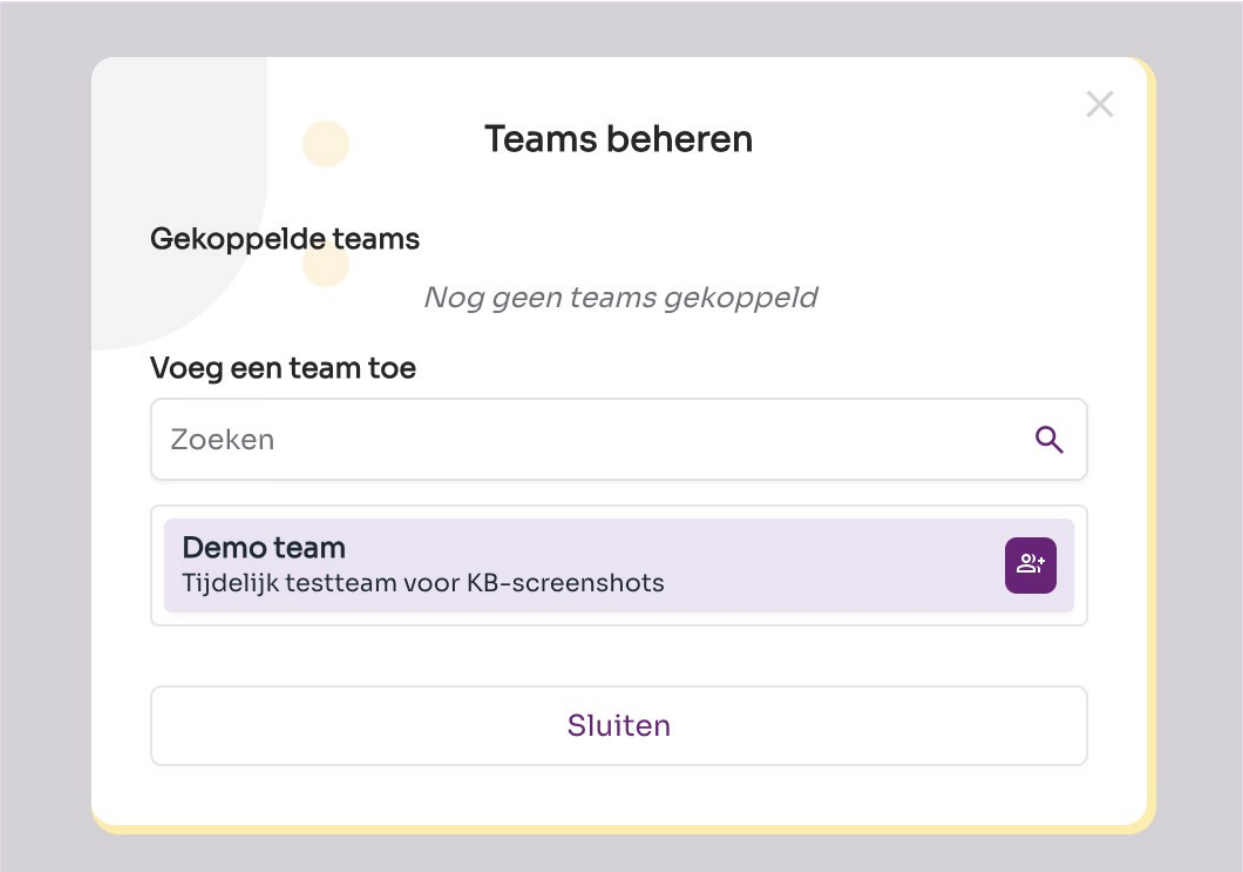


Manage members of a file.

2. Add a member
   Under *Add members* search for the user and click the purple button next to the name.
3. Remove a member
   For a current member, click the red icon next to the name. You can identify the file owner by the crown next to the avatar.

Link a team to a file

1. Click Manage teams
   That is the second icon (two people) on the right in the row.

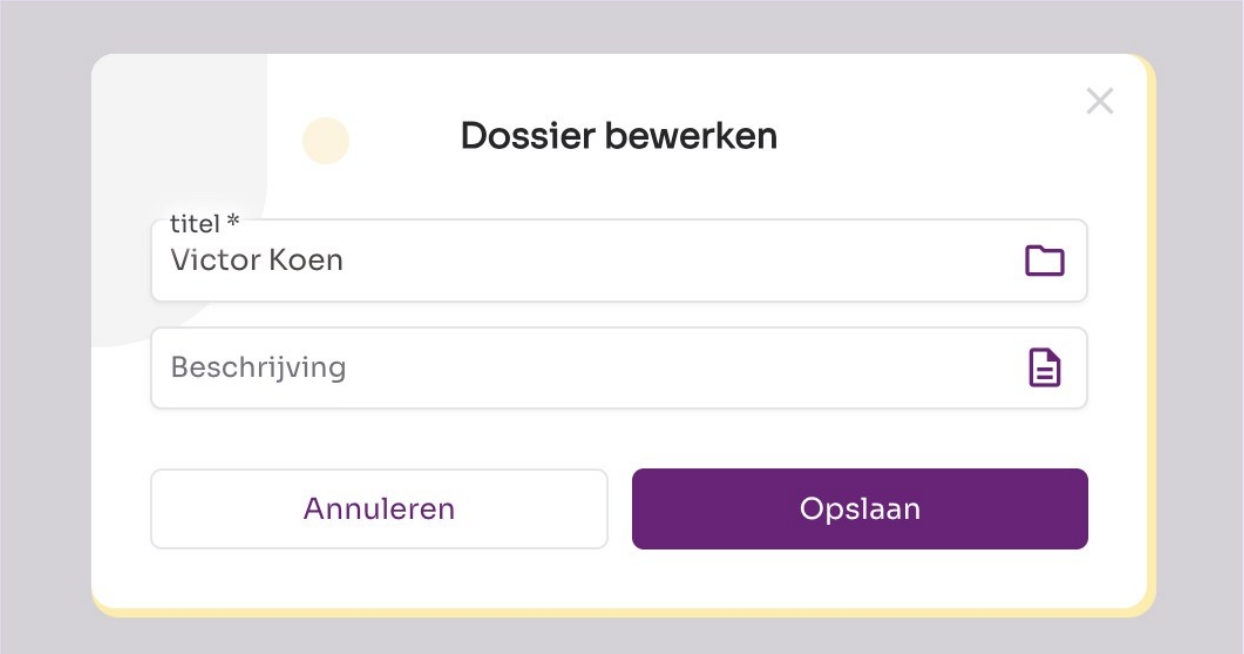


Link a team to a file.

2. Choose a team
   Under *Add a team* you see the teams that are not yet linked. Click the purple button next to the team. All team members will have access to the file.

Edit or delete a file

- With the **pencil** you edit the title and description.
- With the **red trash can** you delete the file with all conversations in it.



Edit the title and description of a file.

Good to know

Note

Deleting a file is permanent: all conversations, reports and tasks in the file will disappear. Data that has already been sent to a CRM or practice software will remain there.

- For more information on how access to files works, what roles exist and how synchronization with practice software affects access, read the article *Access to files in Claritalk* in the Use section.
- If no teams exist yet, the *Manage teams* window will indicate that all organization teams are already linked. First create a team via Manage teams.