How to use the Connect Documents Uploader tool?

Goal

The goal of this tool is to replicate on WinBooks Connect the tree of documents you created on your Windows Explorer (Windows)

How to

1. Launch the setup and follow the steps.

2. Run "WinBooks Connect Uploader" application

3. Fill your WinBooks ID and password

4. If you have access to different companies within WinBooks Connect, choose the right one. The documents will be imported for this company.
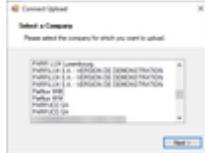
5. Choose the source directory and the destination

- **Source directory**. Click on "…". It will open your files explorer. Select the folder/files you want to upload on Connect.

  If you select a folder, it will create it as 'Yellow folder' on Connect with all files included.

Check the box 'Include subdirectories' if you also want upload subdirectories. If you do not check this box, only the directory selected and files it contains will be uploaded.

- **Destination**. If you already created 'Yellow folder' in Connect, you will be able to select it. If nothing is selected it will be placed in the root 'Documents'

6. Click on 'next' and the upload will start.

7. Go on WinBooks Connect to verify the upload is successfully done

8. Click on 'Continue' if you want to upload more documents or click on 'Finish' if you want close the tool.