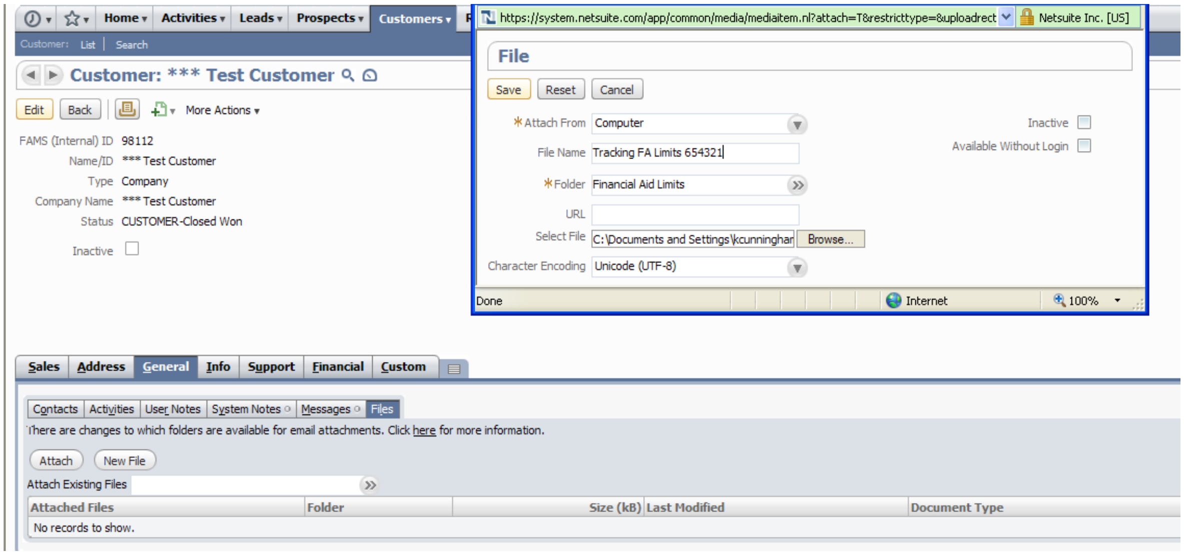
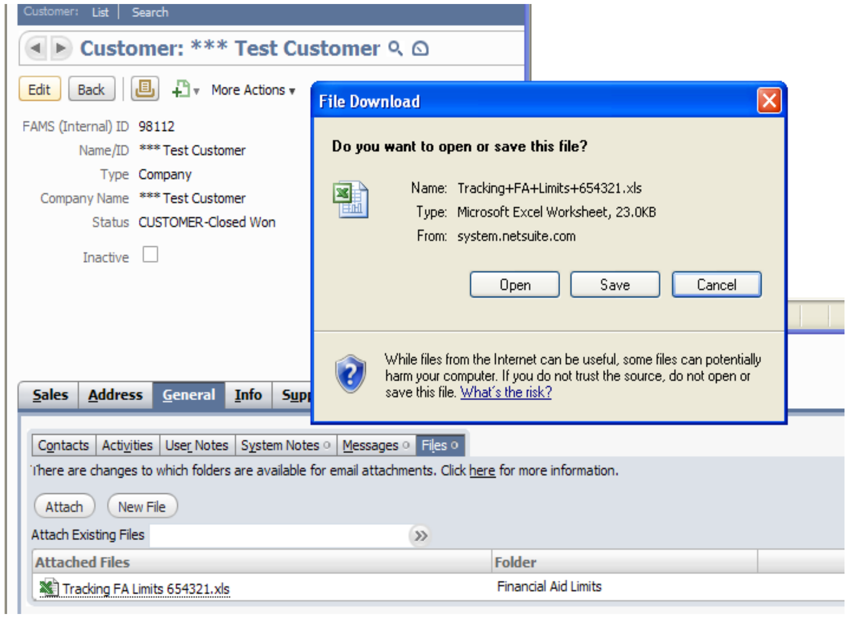
How to attach/upload a document to a customer's record in FAMS



1. In FAMS go to Customer record, open **General** Tab, then open **Files** sub-tab
2. Click on New Files  . A pop-up window will appear.
3. Complete the following fields as demonstrated above:
   - <u>File Name</u>: key in the name of the file. File name should be "Tracking FA Limits" plus the customer's TWIST ID. For example, Tracking FA Limits 654321 (*It is important to customize the file name for each customer, because files are saved under one folder in FAMS. Saving a document with the customer TWIST ID will connect the file to the correct customer.*)
   - <u>Folder Name</u>: Type "**Financial Aid Limits"**
   - <u>URL</u>: leave it blank.
4. <u>Select File</u>: click on Browse button to locate the Tracking Financial Aid spreadsheet on your computer.
5. Click to Open the selected file
6. Click Save. You have now attached the document to the customer record.

How to retrieve and update the Tracking Financial Aid Spreadsheet in FAMS



1. In FAMS go to Customer record, open **General** tab, then open **Files** sub-tab.
2. Select the document you wish to update
3. Open the file.
4. Make the necessary changes to the document and save it on your computer.
5. Follow the directions above for attaching a file to FAMS
6. You have now replaced the existing document with an updated document in the customer record.