

Libraries

September 10, 2026

Libraries

Libraries at a glance

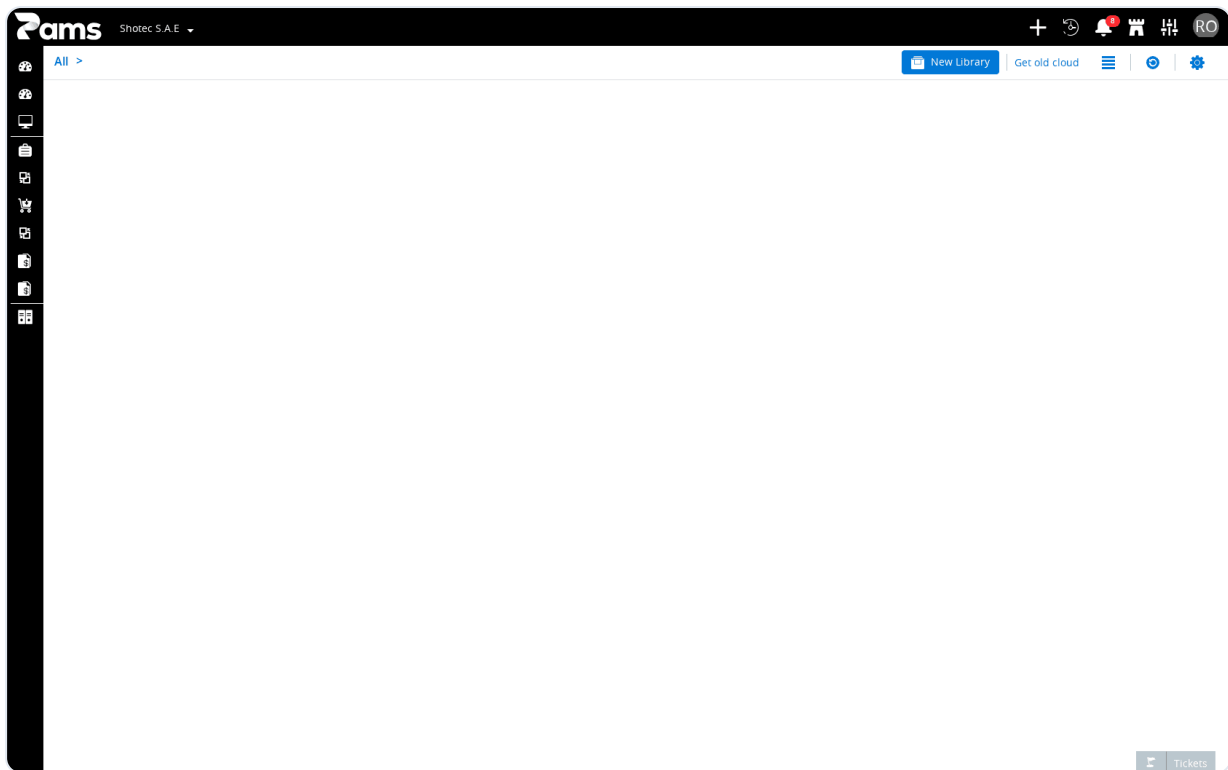
Libraries is the shared file area for organizing libraries, folders, and files in the Data area.

Open it when you need to keep files available for reuse or connect a file with a related record.

If you need to...	Go to
Open the shared file area	Find and navigate library contents
Create a library, folder, or file	Create and maintain libraries and files
Set permissions for a new library	Set library roles
Fix a validation or duplicate-name message	When a file operation goes wrong
Link a file with a sales job	Continue with linked files and Sales job activities and files

The main toolbar provides **New Library**, the icon-only **Switch View**, **Refresh**, and **Settings** controls. The page also provides **Get old cloud**.

Select **Get old cloud** to retrieve older cloud files.



Before you start

Libraries actions depend on your subscription, the location you have opened, and the kind of item you select.

Before you choose an action	What to check
Use the Libraries surface	The Libraries subscription is included. Otherwise the page shows the subscription-upgrade surface.
Create a folder or upload	Open a location other than the root or the default library.
Open Settings	Select a non-default library.
Work with a file	In list view, select a row whose type is File .
Rename an item	Select a Folder or Library row.
Delete an item	In list view, select the row.

The page opens at the root location. Open a library or folder before working with an item in list view. Select the item after its contents appear.

Find and navigate library contents

Use this procedure to open Libraries, search tile contents, switch between views, and move through the folders and files shown in the current location.

Prerequisites

- You have access to the Libraries area.
- You know whether you are looking for a library, folder, or file.

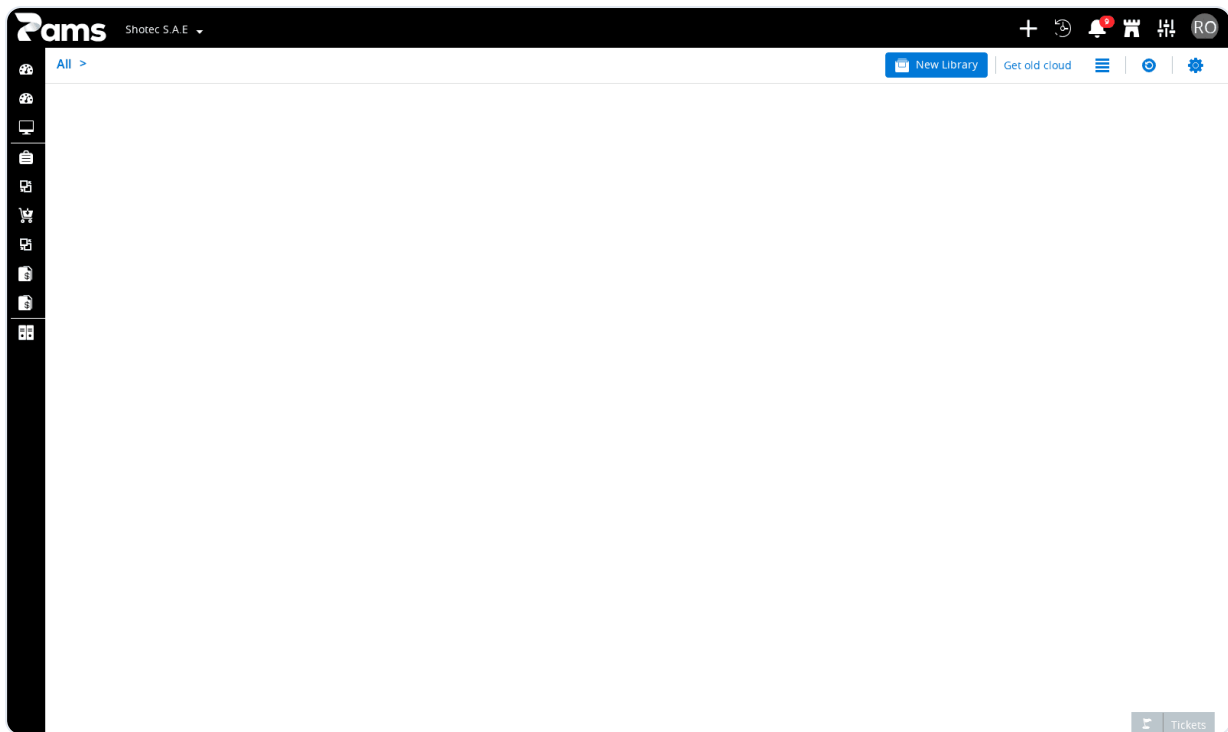
Steps

1. Open **Libraries** from the Data area.
2. Read the current location from the active breadcrumb heading.
3. Enter a search term in the search field with the placeholder `Keyword to Search...`.
4. Select the icon-only **Switch View** control to change between the two content views.
5. Select **Refresh** to reload the current contents.
6. Select the displayed name of a library or folder to open it.
7. In list view, use the headers to identify each row.

The list view uses these columns:

Header	Use it to identify
Name	The library, folder, or file name
Type	Whether the row is a library, folder, or file
Size (B)	The file size when the value is shown
Tags	Links associated with the file
Modified	The date shown for the item

Library, folder, and file names appear in the current content area. When you first open the page, the current location and toolbar can appear without labelled fields or column headings.



Result: The Libraries contents for the selected location are on screen in tile or list view, and you can distinguish each library, folder, or file from its displayed type and name.

Create and maintain libraries and files

Use the operation that matches the item you need to create or maintain. Each operation starts from the current Libraries location.

Create a library

Prerequisites

- You are at the root location, where **New Library** is available.

Steps

1. Select **New Library**.
2. In the dialog titled **New Library**, enter the library name in **Library name**.
3. Review the permissions in **Roles**.
4. Select **OK**.

Result: The new library is processed with the name and roles you entered.

Create a folder

Prerequisites

- You are inside a non-default library location.

Steps

1. Select **New Folder**.
2. Enter the folder name in the text field with the placeholder `Enter Folder Name...`

Result: The folder name is entered in the open form for the current library location.

Upload a file

Prerequisites

- You are inside a non-default library location.
- You have the file ready to upload.

Steps

1. Select **Upload**.
2. Select **Browse** and choose the file.
3. Enter the file's name in **File Name**.
4. Select **Links** when the file belongs with a related record.
5. Select the related record from the target list.
6. Select **Link**.
7. Enter a note in **Comment** when you need to retain context with the file.
8. Select **Add**.

Result: The upload form contains the selected file, name, links, and comments.

Edit, open, download, rename, or delete an item

Prerequisites

- The item is present in the current list view.
- You know whether the selected row is a file, folder, or library.

Steps

1. Select the item's action button.
2. Choose one action from the table.

If you need to...	Select
Open a file	Open
Change a file name, links, or comments	Add/Remove tags or the edit action in Settings
Download a file	Download
Rename a folder or library	Rename
Remove a row	Delete

3. Complete the fields shown for the selected action.

Result: The selected item's form or action menu remains on screen with the information you entered.

The form can contain a name field, **Links**, and **Comment**. After you choose a link type, a second list appears for the related record. Use the exact message shown on screen if the operation stops.

Refresh or retrieve older cloud files

Prerequisites

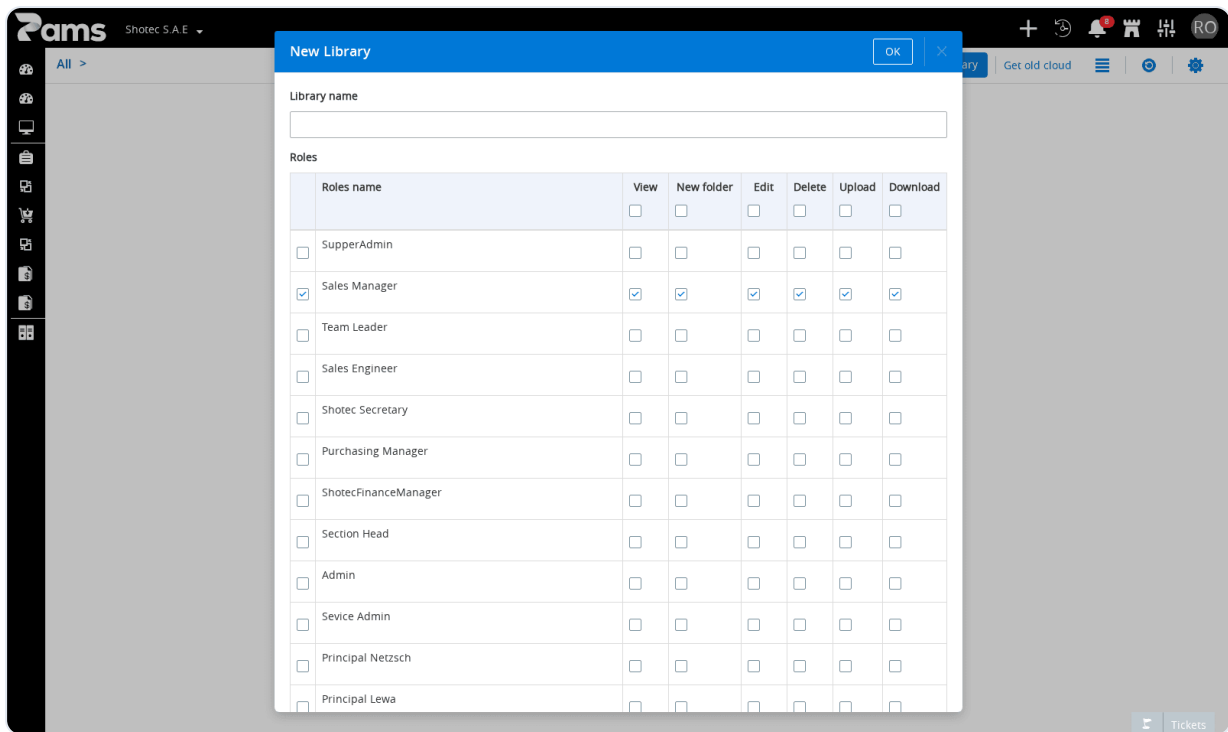
- The Libraries subscription is included.

Steps

1. Choose the toolbar action that matches what you need.

If you need to...	Select
Retrieve older cloud files	Get old cloud
Reload the current contents	Refresh

Result: The requested toolbar action is started and the Libraries surface remains available for the next operation.



Set library roles

Roles are the permission choices shown while you create a library. They control which library actions are presented to each role.

Prerequisites

- You are at the root Libraries location.

Steps

1. Select **New Library** from the root Libraries location.
2. Read the role permissions in **Roles**.
3. Use the role grid to review **Roles name**, **View**, **New folder**, **Edit**, **Delete**, **Upload**, and **Download**.
4. Select **OK** when you finish reviewing the roles.

Result: The role permissions for the new library are on screen, ready for **OK**.

When a file operation goes wrong

Use the message on screen to locate the correction.

Message	When to correct it	What to do
This Field Is Required	A required library, folder, or file-name field is empty.	Enter a value in the field marked as required.
Just '_'-'-'.' And '&' Characters Accepted	A library, folder, or file name contains an unsupported character.	Edit the name to use only the accepted characters.
Library Name Already Exists	The library name already exists in the current list.	Enter a different library name.
Folder Name Already Exists	The folder name already exists in the current list.	Enter a different folder name.
Please Select a file to Upload	No file was selected for upload.	Select Browse and choose a file.
File Nmae is Required	The upload file name is empty.	Enter a value in File Name .
File already Exist	The file name already exists in the current list.	Enter a different file name.
File Title is Used	The edited title is already used by another item.	Enter a different title.
Data Saved Successfully	A library, folder, uploaded file, or edited file was saved.	Continue with the updated item in the current Libraries location.
Data Deleted Successfully	A file, folder, or library was deleted.	Continue with the refreshed Libraries contents.
Your request was completed successfully	The operation finished without an error.	Continue with the next Libraries action.

Continue with linked files

Link a file to a related record when the file needs to be found from that record as well as from

Libraries. The selected-file details area can show links to clients, employees, jobs, projects, users, vendors, tasks, activities, invoices, and payments.

Prerequisites

- A file is selected.
- The link form is available for the selected file.

Steps

1. Select **Links**.
2. Choose the link type.
3. Choose the related record from the target list.
4. Select **Link**.
5. Continue in [Sales job activities and files](#) when the linked file belongs to a sales job.

Result: The file's selected-file details can show the related record, and sales-job file work continues on [Sales job activities and files](#).

Out of scope

The **Export** modal markup is declared, but its opener is commented out. Do not document **Export** as a visible Libraries toolbar action.