



Get the most out of



File Upload User Guide

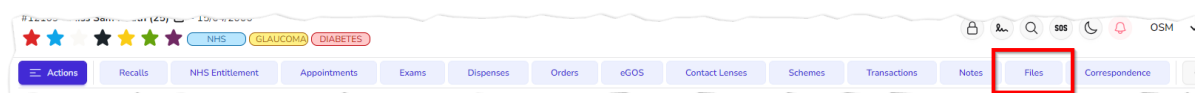
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When loading files to the Patient Record, there are three ways to do this. This manual will explain how this can be done quickly and simply.

Selecting a file

From the patient record **File** section

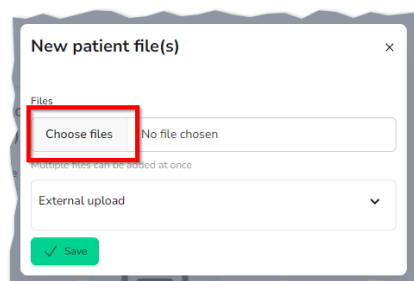


Click on the “+”

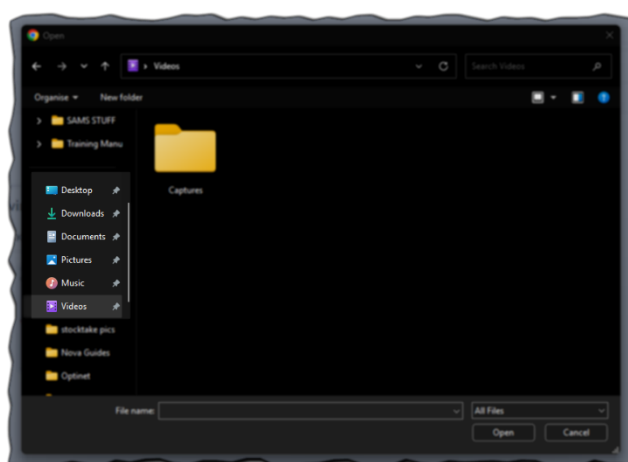


Option 1

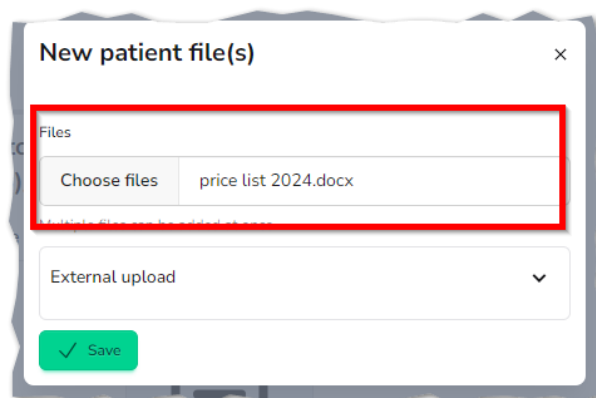
Click on the **Choose Files**



Then open **File Explorer** and select the image or document to upload.

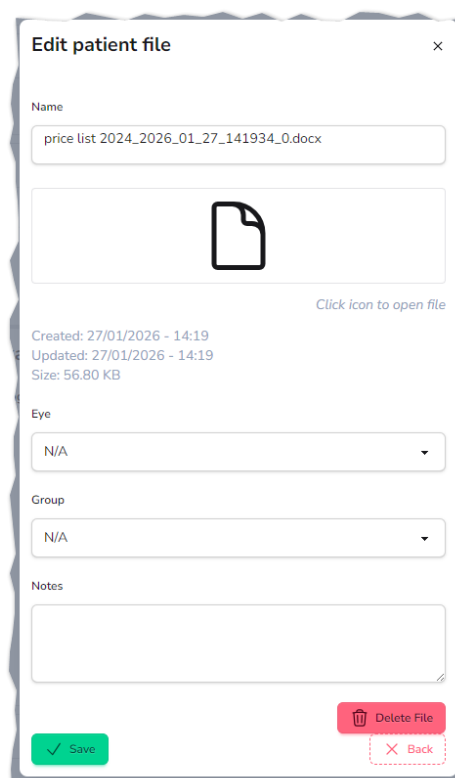
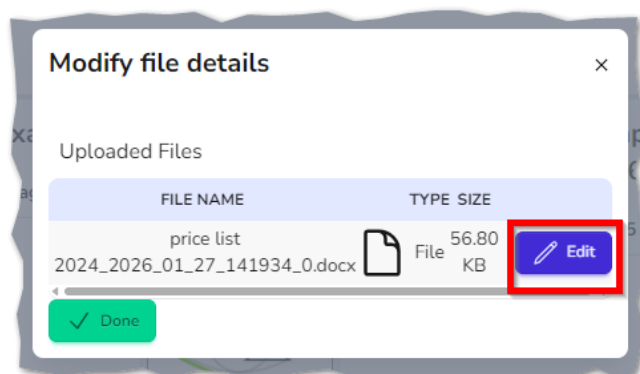


The name of the file chosen will appear next to the upload button.



Click on the **Save** button. The uploaded file will now have a button next to it with **Edit**.

Click the **Edit** button and there will be an option to change the file name or add further details to the image file.



This will then attach the file to the patient record, as below:

Files (3)

Expand / Collapse


File Group

All groups ▾

price list

2024_2026_01_27_141934_0.docx

File - (56.80 KB)27/01/2026 - 14:19

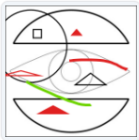


File Group: N/A

Edit

exam-drawing

Image - (129.39 KB)20/01/2026 - 14:27




File Group: N/A

Edit

StockImportTemplate

(6)_2026_01_27_120413_0.xlsx

File - (12.55 KB)27/01/2026 - 12:04



File Group: N/A

Edit

If any of the details need amending, click on the **Edit** button to do so.

Option 2

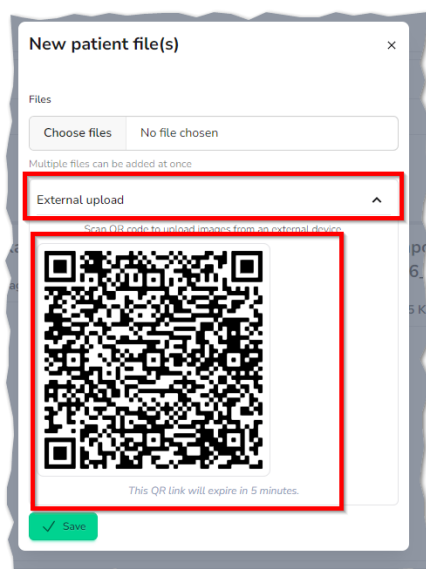
Having clicked on the **Files** button on the **Patient Record**, then clicking on the “+” button at the following screen it is possible to simply drag and drop the file to store the image.



Click **Save** the file will then appear in the patient record **File** section.

Option 3

There is also an option to use a QR Code to upload pictures or documents.



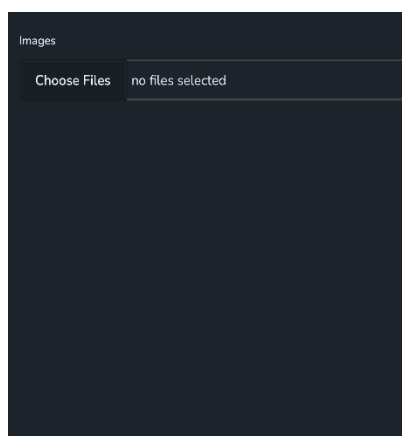
When uploading a document this way, simply use a camera on a tablet or mobile phone. Then open the QR Code link which will be displayed on the device.

The screenshots below will show the details of the mobile device during this process:

Mobile Device Screens

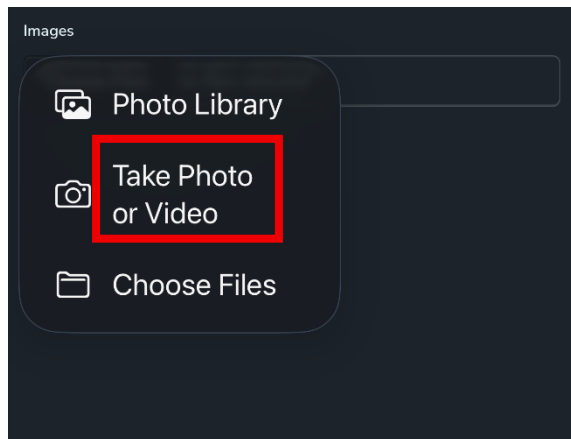
Mobile Device page one

Click on the **Choose Files**



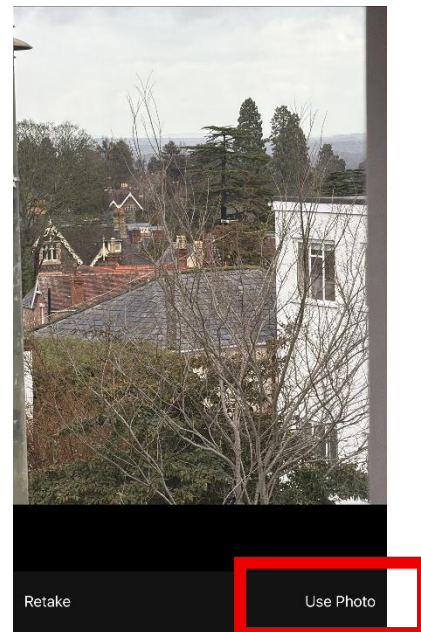
Mobile Device page 2

Select Take Photo/Video
photo



Mobile Device page 3

Take the photo of document, click **use**
photo



Mobile Device page 4

The image will start to upload



Mobile Device page 5



Mobile Device page 6

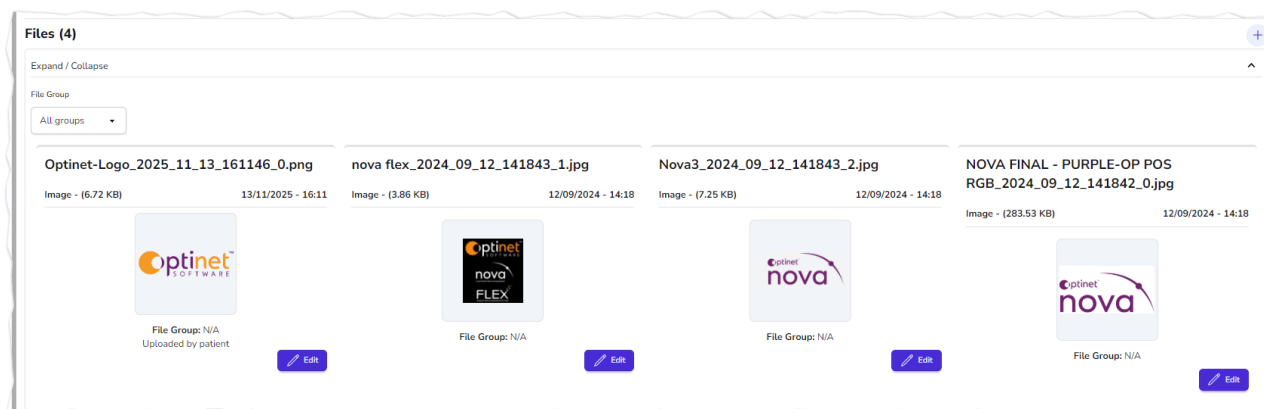
When upload is complete it will show the message below, also the image will now be on the patient file upload box. Click **save** or **edit** and then **done**.



Patient File

This will now be visible within the **Patient Record** Under **Files**, and within the sight test.

Patient Record (Files)



Sight Exam (Files)

