

Document Vault

User Guide

Upload, organize, and share project documents — submittals, as-builts, spec sheets, and certificates — all from Telegram.

Quick Reference

Command: /docs

Access: All paid users

File types: PDF, images, spreadsheets, CAD files

Sharing: Share with team members or via client portal

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1. Getting Started

The Document Vault is your team's central repository for project files. Instead of digging through email attachments or cloud drives, store everything in one place accessible from your phone.

Type /docs to open the Document Vault. From there you can browse, upload, or search your files.

Tip: Upload submittals and spec sheets for each job as soon as you receive them. Your team can access them instantly in the field.

2. Uploading Documents

To upload a document, use /docs and select Upload, or simply send a file to the bot while in the Document Vault flow:

- Send any file (PDF, image, spreadsheet, etc.) to the bot
- The bot asks you to name and categorize the document
- Optionally link it to a specific job
- The file is stored securely and available to your team

Supported file types include PDF, JPG, PNG, XLSX, CSV, DWG, and most common document formats. Maximum file size follows Telegram's limits (50 MB for documents).

Note: Documents are stored securely on the server. Only your team members can access them — unless you explicitly share via the client portal.

3. Organizing Files

Keep your vault organized with categories and job links:

Categories	Submittals, as-builts, spec sheets, certificates, photos, other
Job linking	Associate a document with a specific job for easy retrieval
Search	Find documents by name, category, or job
Sorting	Browse by most recent, category, or job

When you link a document to a job, it appears in that job's file list so any tech working on the job can find it quickly.

4. Sharing with Team

Documents in the vault are automatically visible to all team members on your plan. For external sharing:

- Team access — all techs on your plan can browse and download
- Client portal — attach documents to client-facing reports via /clientportal
- Direct send — forward any document from the vault to another Telegram chat
- Download — tap any document to download the original file

Tip: Use the client portal to share as-built drawings and completion certificates with building managers without giving them access to your internal files.

5. Quick Reference

Open Document Vault	Type /docs
Upload a file	Send file to bot or use /docs > Upload
Search documents	Browse by name, category, or job
Share externally	Use client portal or forward from Telegram
File size limit	50 MB per document (Telegram limit)