

# Adding your Files to Veelo and Editing File Settings

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Making your files available through Veelo is one of the first steps in your implementation process. There are two ways to do this:

1. Uploading them from your computer
2. Syncing with your cloud repository (e.g. Box, Dropbox, OneDrive, Google Drive)

This article shows you how to add files using either method, as well as how to edit your file settings.

## Overview



Uploading Files into Veelo

Syncing Files with Veelo

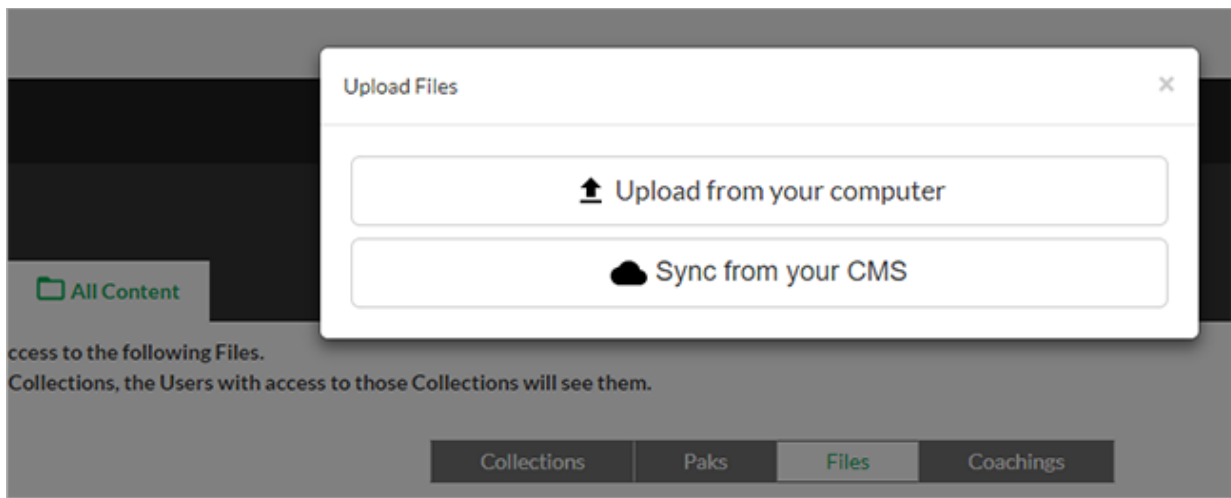
Editing File Settings

## Uploading Files into Veelo

1. In the **Management Controls** area, click on the **Files** tab.
2. On the bottom right corner, click on the **New Files** button.

Active	487.73 MB	7/23/2018
Active	966.58 KB	6/16/2016
 INCLUDE MORE FILES IN THIS ADMINISTRATIVE GROUP		

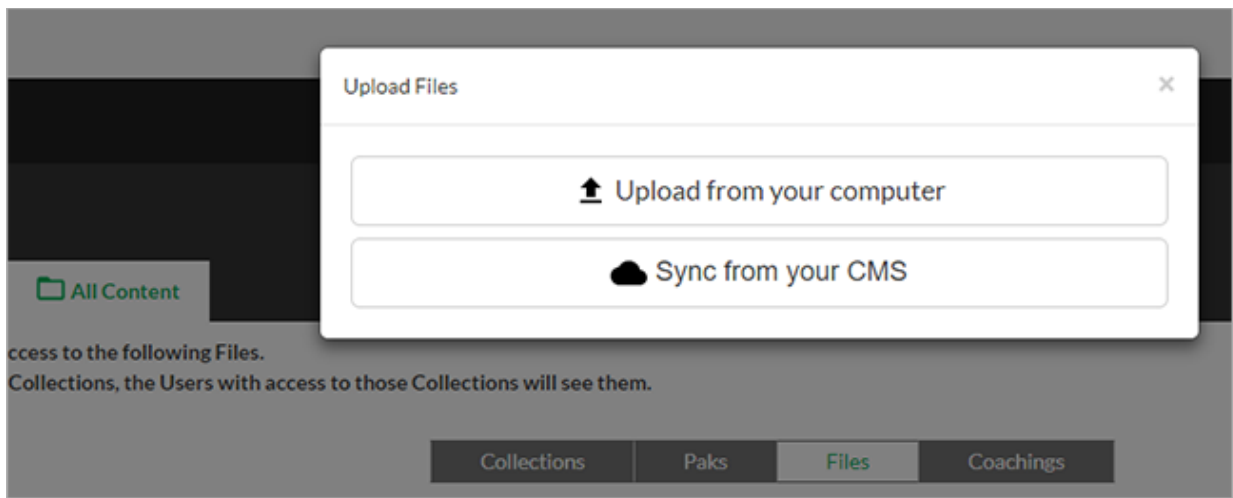
3. If you have file linking from the cloud enabled, make sure you click on the **Upload from your computer** button.



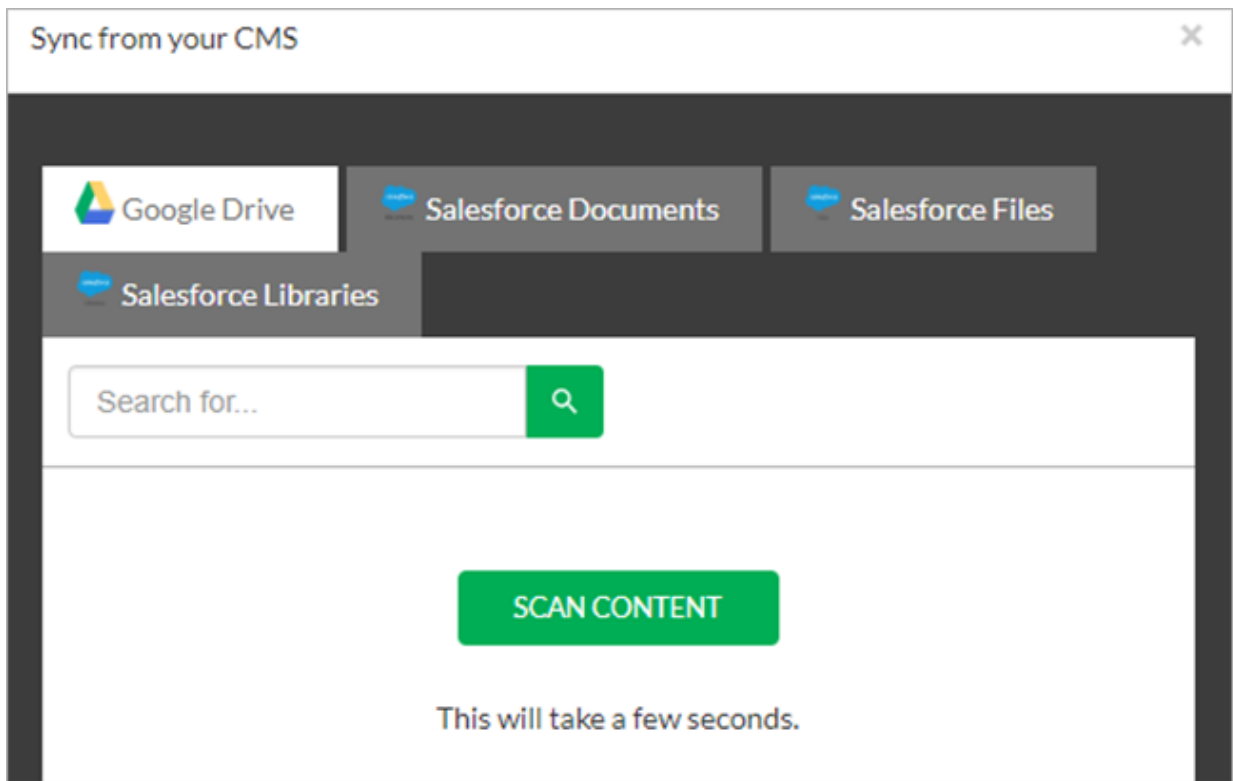
4. Navigate to the file location and double-click on it to upload the file.
5. You can upload multiple files at once by selecting multiple files. We do not recommend uploading more than ten files at once. Files larger than 5MB should be uploaded individually to avoid long processing times.

## Syncing Files with Veelo

1. The first time you sync with any remote repository, please make sure you log in through <https://home.veeloapp.com> instead of your custom domain, if one has been set up for you.
2. Click on the menu in the upper right and go to the **Management Controls** area, then click on the **Files** tab.
3. On the bottom right corner, click on the **New Files** button.
4. Click on **Link Files from the Cloud**.



5. You'll be presented with the cloud repository options specified in your contract. Click on the tab for the repository you would like to sync from. If you have never authenticated with the repository, you will need to click on the **Start Authentication** button and follow the authentication steps. If you've authenticated before with the repository, click on the **Scan Content** button to see a listing of the content.



6. Click on the checkbox to select the necessary files or folders. You can use the search function to look for the exact files or folders you need. Once you've selected

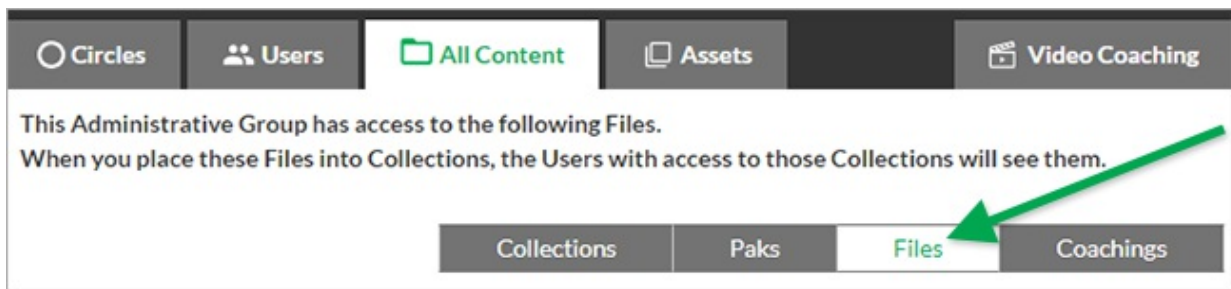
everything you'd like to sync, click on the **Select Files/Folders** button. The selected content will now sync with Veelo. All synced files and folders will have an icon to the left of their filename indicating which repository they're synced from.

## Editing File Settings

After you have uploaded or synced your files, you will need to edit your file settings. The default display name for a file is the file name. However, these names may not necessarily be the most useful or readable to your end users. All files are also not **Shareable** by default, which means they can't be shared using Veelo's share feature.

Edit the file settings as follows:

1. Find the file you want to edit in the **Files** tab.



2. Click on its name to go to its settings page. Click on one of the **Edit** links or on the **Edit** button to edit its settings.

**Case Study: Law Firm Highlights**

[Manage this File](#)

**PDF** Case Study: Law Firm Highlights (Dragon-Legal-CaseStudy-Success Story.pdf)

**Details** [edit](#)

- Name Shown To Users: Case Study: Law Firm Highlights
- Description: (no description)
- Upload Name: (Dragon-Legal-CaseStudy-Success Story.pdf)
- Size: 1.20 MB

▶ **5 Tag Categories**

**Settings** [edit](#)

- State: Active
- Shareable: Yes  
Shareable Files can be shared outside your organization.
- Downloadable: Yes  
Downloadable Files can be downloaded from file preview.

**DOWNLOAD** **DELETE** [UPLOAD NEW VERSION](#) [EDIT](#)

3. Edit the **Name** field to change its display title. You can also add a short description for the file, which your users can see when they preview the file.

**Case Study: Law Firm Highlights**

**Manage this File** [Refresh] [Share] [More] [List]

Edit File: Case Study: Law Firm Highlights

**Name**

Case Study: Law Firm Highlights

**Description**

*Shown to licensed Veelo users only, not share recipients.*

[Description Text Area]

**State**

Active

**Shareable**  
Shareable Files can be shared outside your organization.

**Downloadable**  
Downloadable Files can be downloaded by your users and prospects.

**SAVE** **CANCEL**

4. Check the **Shareable** box if you want to make the file shareable.

**State**

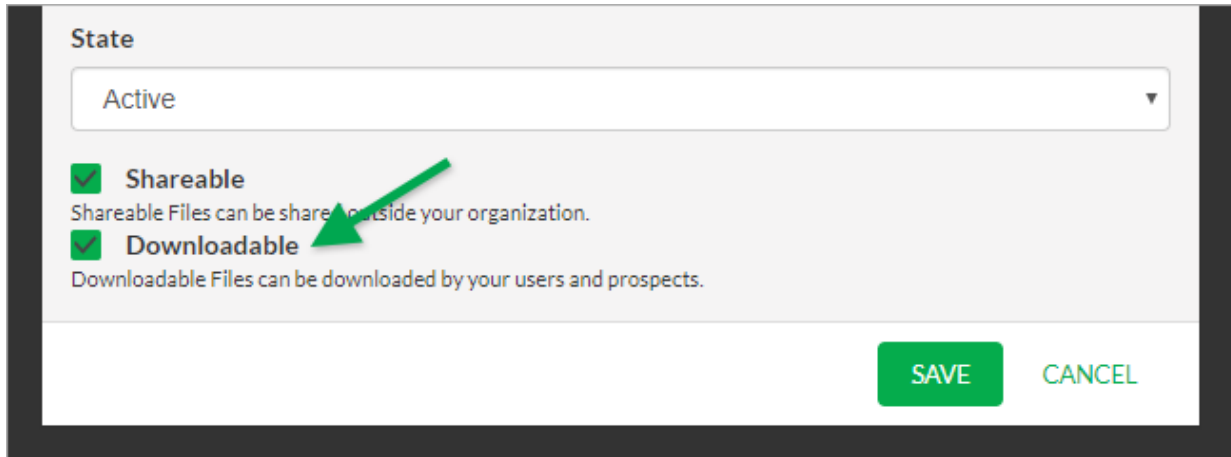
Active

**Shareable**  
Shareable Files can be shared outside your organization.

**Downloadable**  
Downloadable Files can be downloaded by your users and prospects.

**SAVE** **CANCEL**

5. Uncheck the **Downloadable** box if you want to restrict the download of this particular file by your users, prospects and customers. Leave the box checked if you want it to remain downloadable.



**State**

Active

**Shareable**  
Shareable Files can be shared outside your organization.

**Downloadable**  
Downloadable Files can be downloaded by your users and prospects.

**SAVE** **CANCEL**

6. Click **Save** when done.

## FAQs

### How often does Veelo sync with my repository?

File syncing currently runs once a night, with plans in the near future to sync more frequently.

### If I replace a file with an updated version in the repository, will I need to re-tag the file, change the file display name, and place it in the correct Circle(s) or Collection(s) all over again?

Assuming that you replaced the file, Veelo will keep all existing metadata for the synced file, including its Veelo tags and display name.

However, if you delete the original file and upload a new copy instead of overwriting the

outdated file, you will need to re-tag the content, re-edit the display name, and re-add the new file to all Circle and Collections it used to belong to. For this reason, we strongly recommend overwriting the old synced copy in the repository instead of doing a delete-and-reupload.

### **Does Veelo keep a copy of my synced files?**

No. Veelo indexes the files in your repository. For certain file types (such as Word documents and PowerPoint presentations), our system generates a preview so your users can see the file contents.

### **What happens when a user downloads a synced file?**

In this case, Veelo will connect to your repository and allow your users to download a copy of the file. This is to ensure your users receive the most up-to-date copy.