Other Features

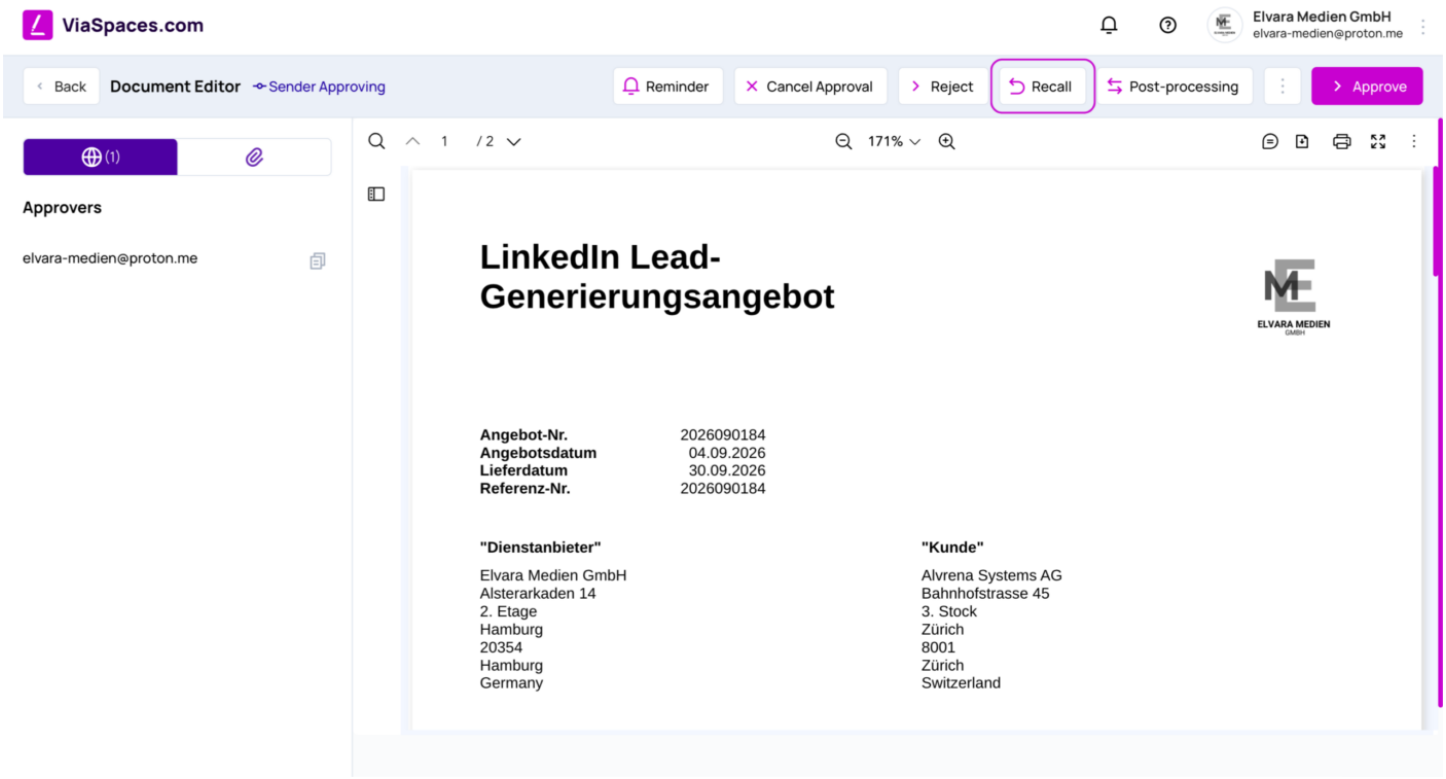
Documentation · https://viaspaces.com/Documentation/other-features/

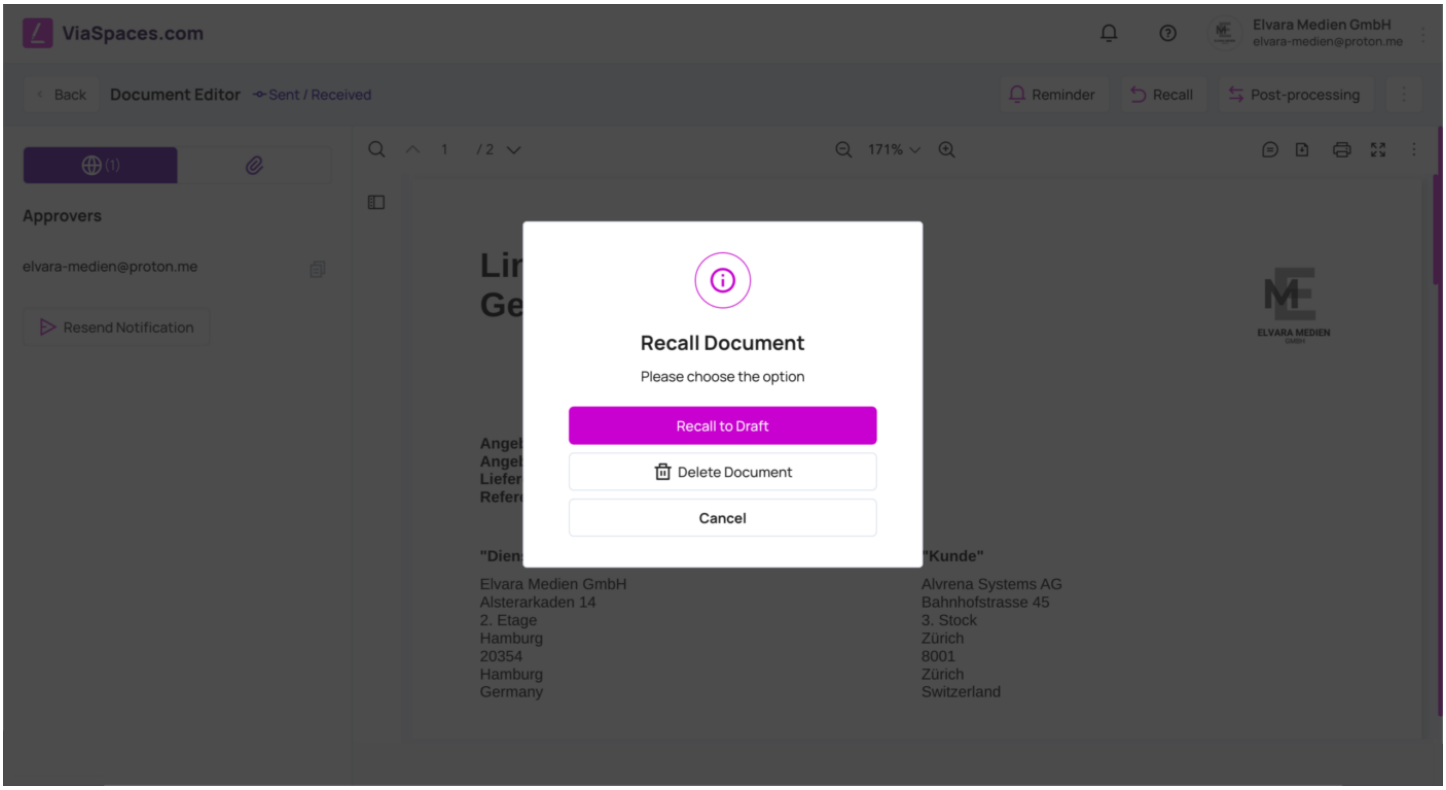
In this help doc: the actions and tools that support documents outside creating and sending them — recall, delete, the Bin, export, upload, reminders, and mass copy.

These functions apply to documents already in the account. They cover withdrawing a sent document, removing and restoring documents, exporting, importing external files, setting reminders, and copying a document in bulk.

Recall

Recall returns a sent document to **Draft** before it is approved, so it can be corrected or cancelled. It is available to the sender for documents delivered through ViaSpaces.com and for Sign In Person delivery, and it is managed only from the sender side. After a recall, the document is a draft again and can be edited and resent.


ViaSpaces.com
Elvara Medien GmbH
elvara-medien@proton.me
Back
Document Editor
Sender Approving
Reminder
Cancel Approval
Reject
Recall
Post-processing
Approve
(1)
Approvers
elvara-medien@proton.me
1
/ 2
171%
LinkedIn Lead-Generierungsangebot
ELVARA MEDIEN
Angebot-Nr. 2026090184
Angebotsdatum 04.09.2026
Lieferdatum 30.09.2026
Referenz-Nr. 2026090184
"Dienstanbieter"
Elvara Medien GmbH
Alsterarkaden 14
2. Etage
Hamburg
20354
Hamburg
Germany
"Kunde"
Alvrena Systems AG
Bahnhofstrasse 45
3. Stock
Zürich
8001
Zürich
Switzerland


ViaSpaces.com
Elvara Medien GmbH
elvara-medien@proton.me
Back
Document Editor
Sent / Received
Reminder
Recall
Post-processing
(1)
Approvers
elvara-medien@proton.me
Resend Notification
1
/ 2
171%
ELVARA MEDIEN
Recall Document
Please choose the option
Recall to Draft
Delete Document
Cancel
"Kunde"
Elvara Medien GmbH
Alsterarkaden 14
2. Etage
Hamburg
20354
Hamburg
Germany
Alvrena Systems AG
Bahnhofstrasse 45
3. Stock
Zürich
8001
Zürich
Switzerland

Delete

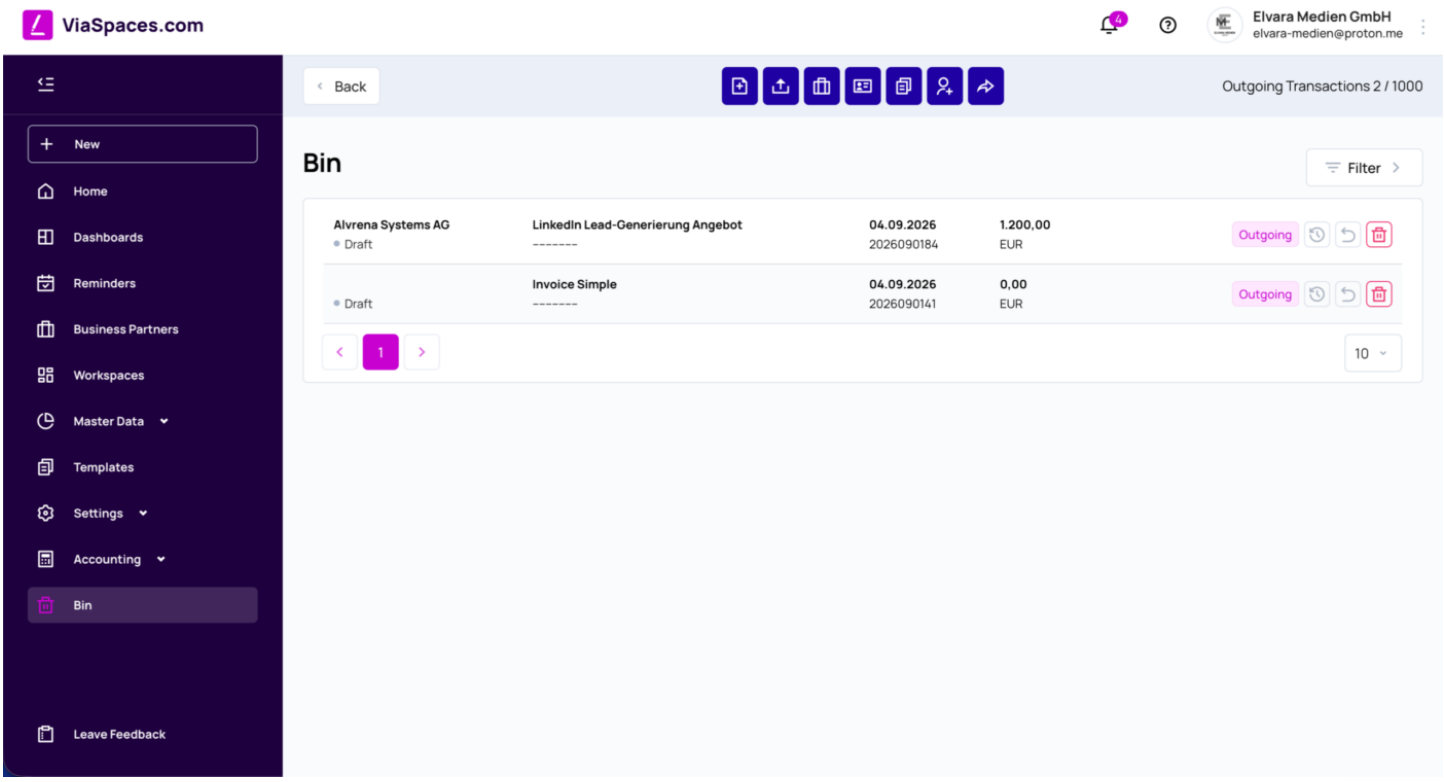
A draft is removed with **Delete Draft**, and a completed document with **Delete Completed**. A deleted document is moved to the **Bin**, from where it can be restored. Deletion does not remove the document permanently while it is in the Bin.

The Bin

The **Bin**, opened from the sidebar, lists removed documents with their status, subtype, date, value, and direction (**Outgoing** or **Incoming**). A **Filter** narrows the list.

Each row offers:

- **Restore** — returns the document to its previous place.
- **History** — shows the document's action log.
- **Delete** — removes the document.



Export

Export saves documents from the Dashboard to a file. **Export Documents** packages the documents directly into a ZIP and prompts for a folder to save them. The export includes the documents currently shown to the user — that is, the documents matching the filter the user has applied.

Export options:

- **Export Documents** — the documents as a ZIP.
- **Export Documents with Attachments** — the documents together with their attachments.
- **Export to .csv** — the document data as a .csv file.

Note: Export follows the active filter. Only the filtered documents are exported. Export is run from the Dashboard; see the Overview and Navigation page.

Upload Document

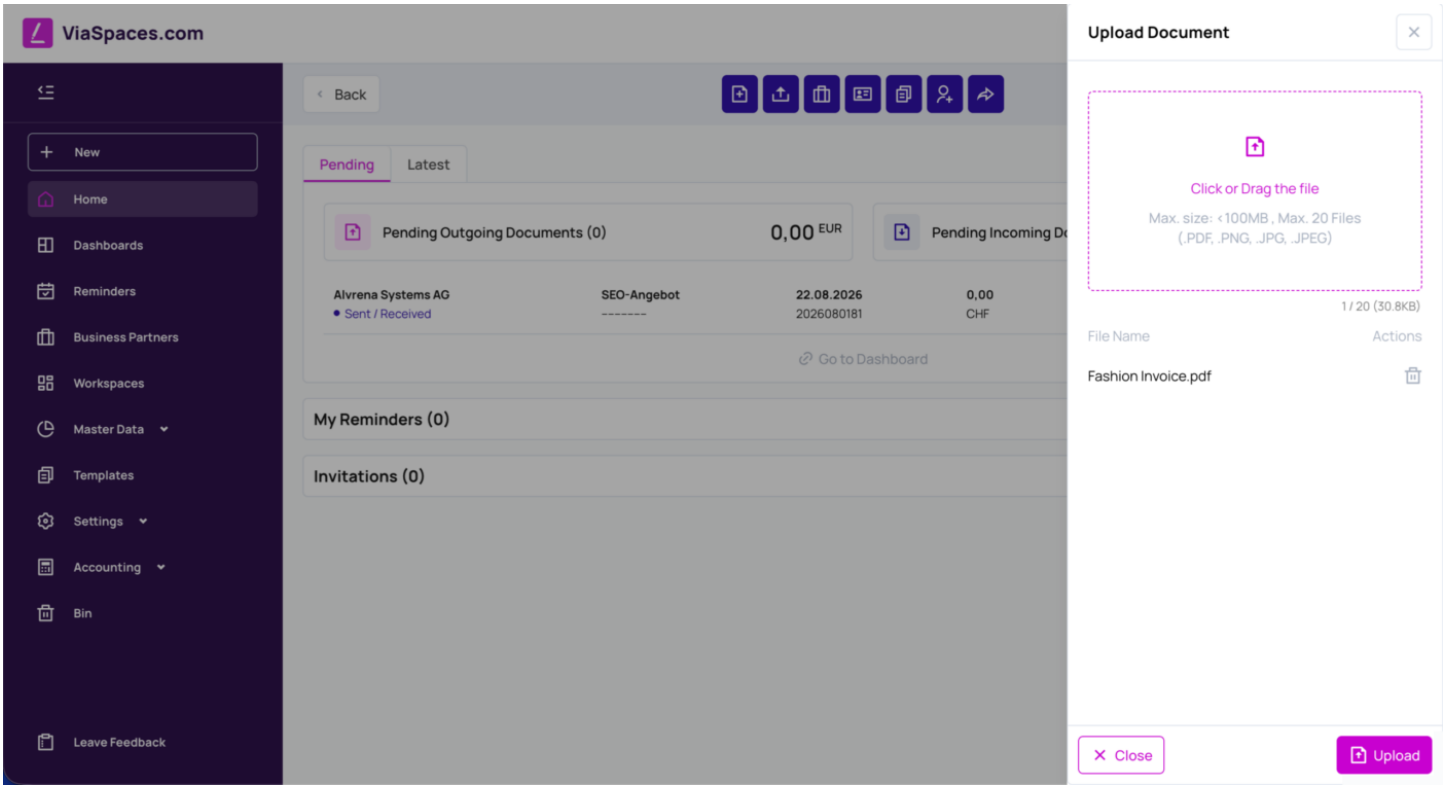
Upload Document imports external files as documents in the account. Open it from the **New** menu.

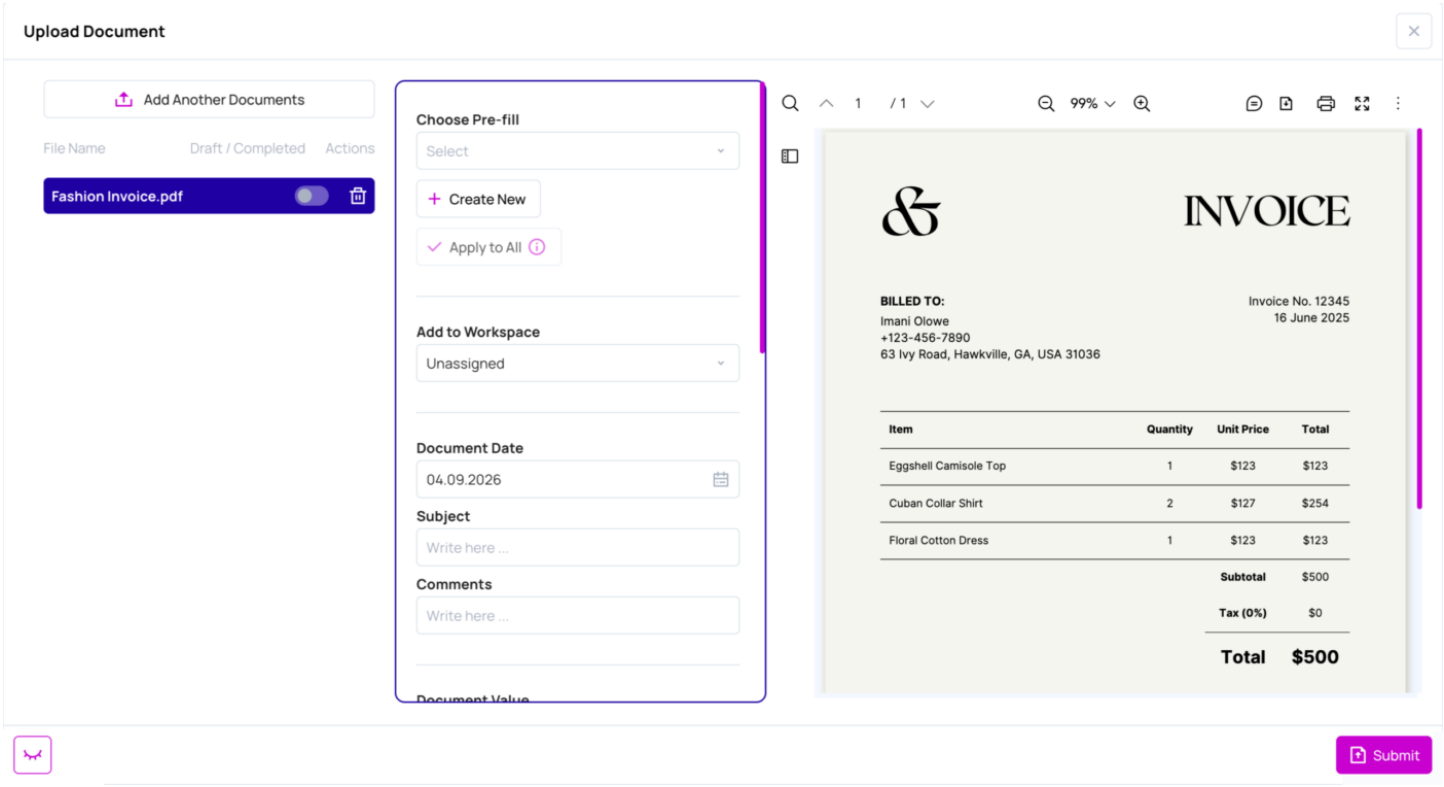
1. Click or drag files into the upload area. Up to **20 files** are accepted, each under **100 MB**, in **.PDF, .PNG, .JPG, or .JPEG**.
2. Click **Upload**.
3. For each file, complete the document details.
4. Click **Submit**.

The details panel holds:

- **Choose Pre-fill** — applies a saved prefill, or **Create New** to make one. **Apply to All** uses the same settings for every uploaded file.
- **Add to Workspace** — assigns the document to a workspace.
- **Document Date**, **Subject**, **Comments**.
- **Document Value**, **Taxes**, **Excl. Tax**, **Currency**.
- **Business Partner**, **Inbound / Outbound** (Incoming or Outgoing), **Document Number**, **Reference**.
- **Document Type** and **Document Subtype**.
- **Additional Information** — Case Number, Batch No., Insurance Policy, Shipping Number, Trade No., Certificate Number, Expiration Date, Due Date, Valid From, Valid To.

Add Another Documents adds more files to the same upload. Several files can be uploaded together as a batch.


ViaSpaces.com
Back
New
Home
Dashboards
Reminders
Business Partners
Workspaces
Master Data
Templates
Settings
Accounting
Bin
Leave Feedback
Pending
Latest
Pending Outgoing Documents (0)
0,00 EUR
Alvrena Systems AG
Sent / Received
SEO-Angebot
22.08.2026
2026080181
0,00
CHF
Go to Dashboard
My Reminders (0)
Invitations (0)
Upload Document
Click or Drag the file
Max. size: <100MB , Max. 20 Files
(.PDF, .PNG, .JPG, .JPEG)
1 / 20 (30.8KB)
File Name
Actions
Fashion Invoice.pdf
Close
Upload

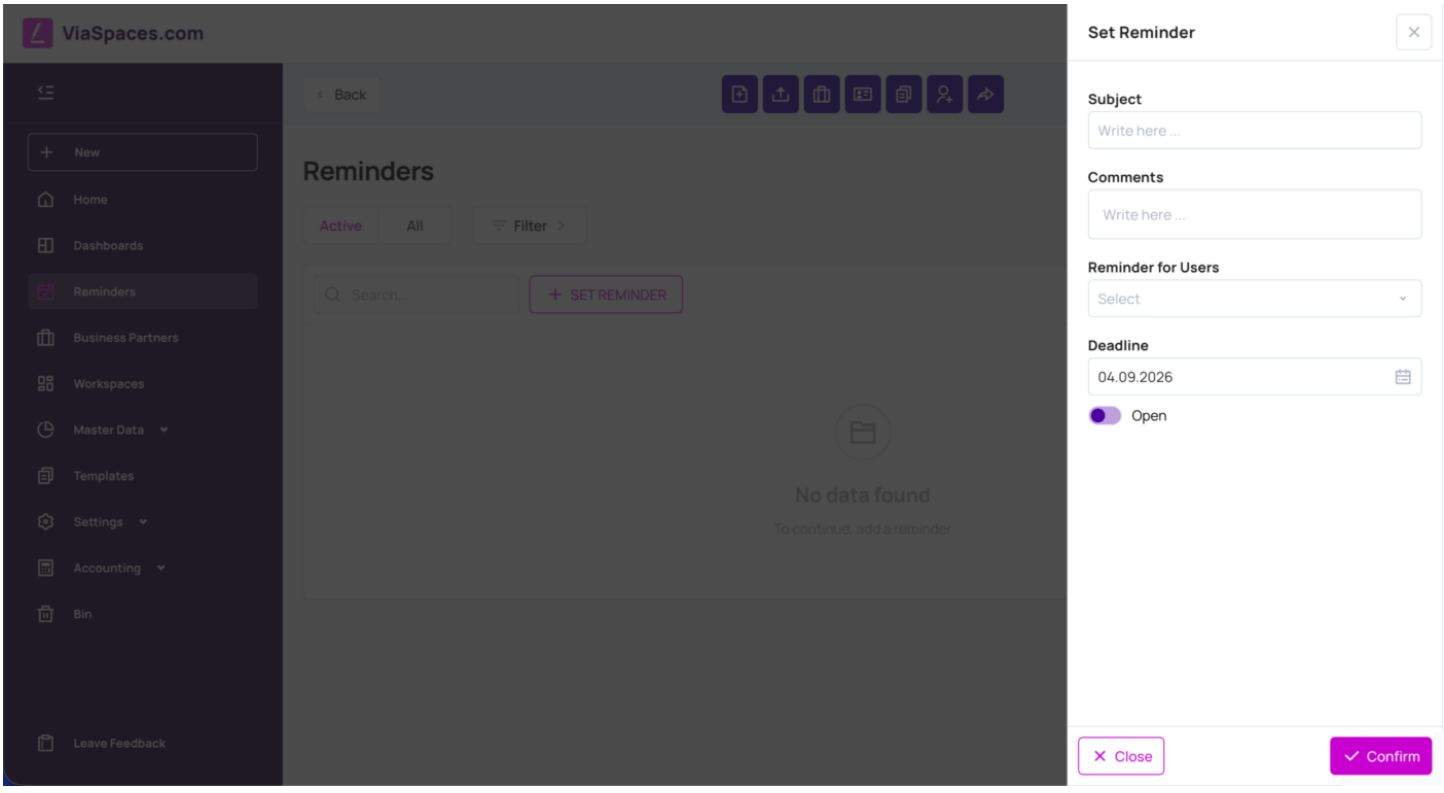

Upload Document
Add Another Documents
File Name
Draft / Completed
Actions
Fashion Invoice.pdf
Choose Pre-fill
Select
Create New
Apply to All
Add to Workspace
Unassigned
Document Date
04.09.2026
Subject
Write here ...
Comments
Write here ...
Document Value
1 / 1
99%
INVOICE
BILLED TO:
Imani Olowe
+123-456-7890
63 Ivy Road, Hawkville, GA, USA 31036
Invoice No. 12345
16 June 2025
Item
Quantity
Unit Price
Total
Eggshell Camisole Top
1
$123
$123
Cuban Collar Shirt
2
$127
$254
Floral Cotton Dress
1
$123
$123
Subtotal
$500
Tax (0%)
$0
Total
$500
Submit

Reminders

A reminder attaches a task with a deadline to a document. Create one with **Reminder** in the document, or **Create Reminder** from the Home page.

1. Enter a **Subject**.
2. Add **Comments**.
3. Select **Reminder for Users**.
4. Set a **Deadline**.
5. Set the **Open** toggle.
6. Click **Confirm**.

Reminders are listed under **My Reminders** on the Home page and on the Reminders page. Assigning a reminder to another user notifies that user of the task.



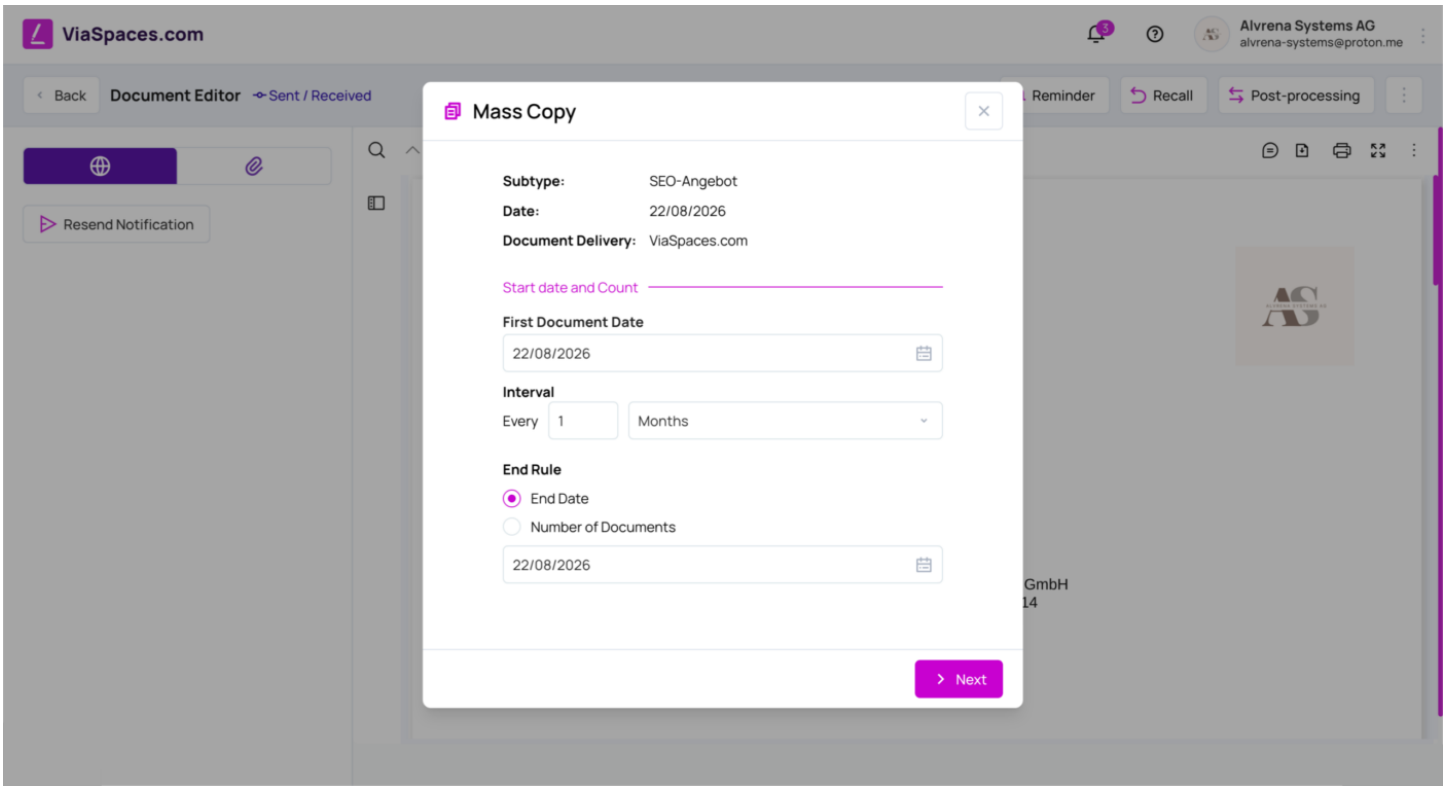
Mass Copy

Mass Copy creates a series of copies of a document on a schedule — useful for a document that repeats on a regular cycle, such as a recurring invoice. Open it from the More or Post-processing menu.

The dialog runs in steps:

1. **Start date and count** — set the **First Document Date**, an **Interval** (for example, every 1 month), and an **End Rule**: an **End Date** or a **Number of Documents**.
2. **Document number and validity** — set **Document No.** to **Assign Now** or to assign when the document is sent, and set **Valid From** relative to the document date. A **Documents Preview** table lists the copies with Creation Date, Document Number, Document Value, Currency, and Valid From.
3. **Action** — choose what happens to each copy: **Save Draft**, **Schedule for approval**, **Schedule for Send**, or **Send Now**. For a scheduled approval or send, set the approvers and the send date.
4. **Confirm** — review the source document and parameters, then click **Confirm & Create**.

Each copy is generated with its own document number and validity dates according to the settings.



Source Document

Subtype: SEO-Angebot
Document Date: 22/08/2026

Document Parameters

First Document Date: 22/08/2026
Period: Months
Activity: Schedule for approval
End Rule: 31/12/2026
Document No.: Assign When Sent
Delivery Date: Document Date +14 days
Reference No.: YYYYMM"018"#

Documents Preview (5)

Creation Date	Document Number	Document Value	Currency	Delivery Date	Reference No.
2026/08/22	2026080182	0,00	CHF	2026/09/05	Document Number
2026/09/22	2026090183	0,00	CHF	2026/10/06	Document Number
2026/10/22	2026100184	0,00	CHF	2026/11/05	Document Number
2026/11/22	2026110185	0,00	CHF	2026/12/06	Document Number
2026/12/22	2026120186	0,00	CHF	2027/01/05	Document Number

Copy

Copy creates a single duplicate of a document. It is available in the document's More and Post-processing menus.