

Customer Explorer Documents-Edit

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If the User has General Document Edit permissions, the User will be able to make changes to the Description, Security Level and Document Type information for an attached document. Follow the steps below to edit existing documents located in the Documents list of the Customer Explorer.

1. To Edit an existing Document information, highlight the Documents option from the Customer tree. In the Active Pane highlight the document to be edited; right-click and select the Edit Document Properties option.

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2. The Document Edit form will be displayed. Make the necessary changes then click the Update button located at the lower right of the Document Edit form. When a document is edited, the User name and the update date and time are saved to the document and displays in the Documents list.

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