

General Documents – How to Add a Document

Last Modified on 12/23/2024 12:58 pm EST

If your Company has purchased SedonaDocs, you will have access to General Documents.

This feature is also Permission based.

SedonaSetup

Select the User Group you want to allow access to General Documents.

Select “General Documents” if you want to allow Viewing Only.

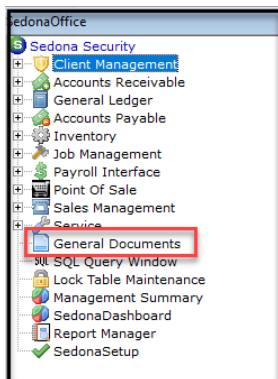
If you want to allow Editing and/or Deletion of Documents, select those permissions.

Click Apply.

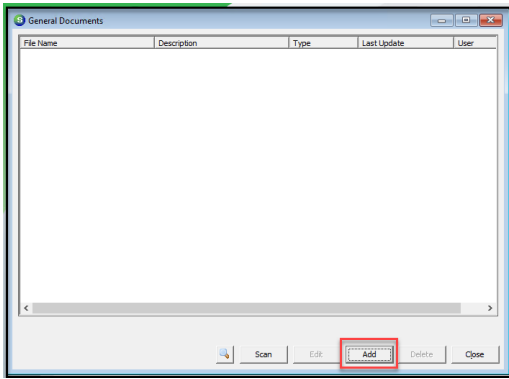
Access	Module
<input type="checkbox"/> Edit Customer Comments	SV
<input type="checkbox"/> Bill Ticket to Cycle	SV
<input type="checkbox"/> Batch Billing	SV
<input type="checkbox"/> General Documents	DX
<input type="checkbox"/> Allow Document Edit (All Documents)	DX
<input type="checkbox"/> Allow Document Delete (All Documents)	DX

General Documents

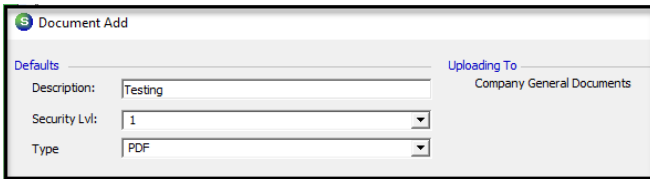
Select General Documents on the Side Menu.



Select “Add.”

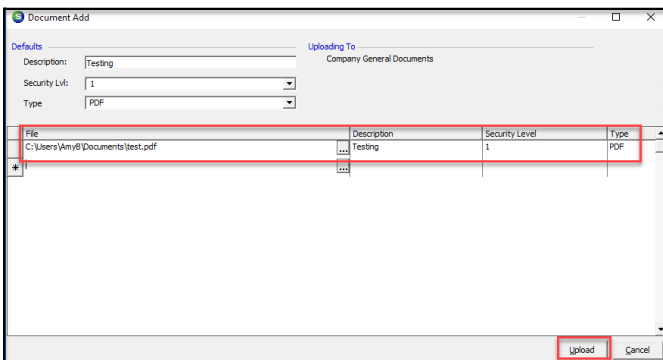


Enter a Description, Security Level and Type.



Select the File box and select the document you want to add.

Select Upload.



The document is now listed under General Documents and can be viewed/accessed by any User with the Permission enabled.