

# How do I create a new document?

## 1. Click on **New document**.

Document details

Document file: **No file selected.**

Name:

Request sign:

Signed by:

Category: NCR FORMS

Custom attributes

ID: 20

Type:

Description:

Tags:

Notify user:

Editable:

Confidential:

Visible for locations

Select all

Mastex Trader

Save Save & close Close

## 2. Click on to select the **document**.

3. Enter or edit the **Name**. The name of the document will be automatically generated based on the chosen document.
4. In the right column, select the **locations** for which the document should be visible.
5. Complete all required fields.
6. Click on **Save & close**.

- **Description:** Enter a description of the document.
- **Tags:** To be able to search for certain words using the search function.
- **Confidential:** Indicate whether this is a confidential document. Only authorised users will have access to this document. This document will not appear in the list for non-authorised users.
- **Sign:** If the document has to be signed before it can be opened, select this option. In order to open the document, the user will first be prompted to enter the password.
- **Notify user:** The user will be notified of any changes to the document when starting MXSuite.
- **Editable:** Select this option if the document needs to be edited. This makes it possible to edit the document at a later date and save it in the database.

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