

# General Documents – How to Add a Document

07/02/2024 5:58 pm EDT

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.

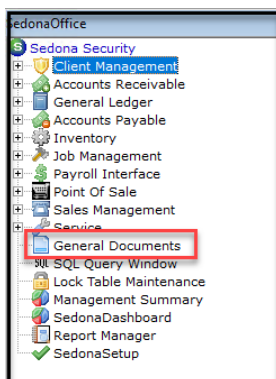
If you want to allow Editing and/or Deletion of Documents, select those permissions.

Click Apply.

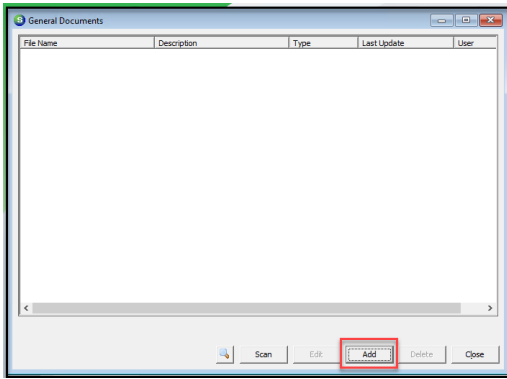
| Access                                                         | Module    |
|----------------------------------------------------------------|-----------|
| <input type="checkbox"/> Edit Customer Comments                | SV        |
| <input type="checkbox"/> Bill Ticket to Cycle                  | SV        |
| <input type="checkbox"/> Batch Billing                         | SV        |
| <input type="checkbox"/> <b>General Documents</b>              | <b>DX</b> |
| <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.”



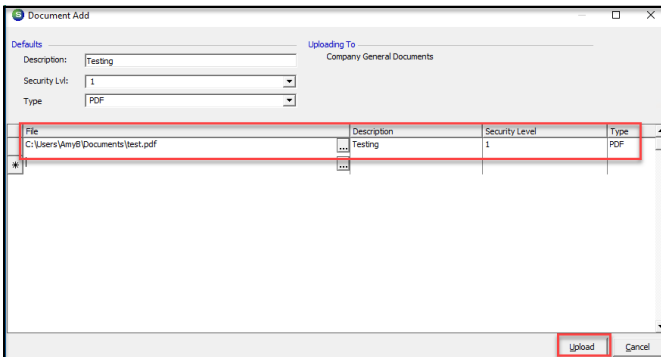
Enter a Description, Security Level and Type.

The 'Document Add' dialog box contains the following fields and values:

- Description:** Testing
- Security Lvl:** 1
- Type:** PDF
- Uploading To:** Company General Documents

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.