Document Management

How to Save a Document:

- Open the entity that the document you wish to save relates to.
- 2. Click the **Documents** tab in the ribbon.
- Click the 'Save File to PlainSail' icon to upload a file into PlainSail.
- You can also drag and drop the file from Windows
 Explorer into the documents pane.
- When dragging and dropping, ensure that you have the workspace that you wish to save the document to open.
 N.B. by default, only workspaces that contain documents will be visible. To view all workspaces, click the 'Show not in use' button.

How to Edit a Document:

- Open the workspace of the document you wish to edit by clicking it in the workspace pane.
- Double click on the document that you wish to edit and then choose 'Edit Document'.
- The document will now be **launched** and will be checked out.

How to Create a Document from a Template:

- 1. **Click** the 'Launch Template' icon in the ribbon.
- Click the workspace in which to save the template, name the document and select the template that you wish to use.
- Click 'Start' to generate the document from the template.

How to Circulate a Document for Approval and Signing:

- 1. **Double click** the **document** that you wish to **circulate**.
- 2. Click 'Circulate for electronic signing/ approval'.
- Select the users that the document should be circulated to.
- 4. Click 'Send' to circulate the document.

Documents



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