

Document Management

How to Save a Document:

1. Open the entity that the document you wish to save relates to.
2. **Click** the **Documents** tab in the ribbon.
3. **Click** the **'Save File to PlainSail'** icon to upload a file into PlainSail.
4. You can also **drag and drop** the file from **Windows Explorer** into the **documents pane**.
5. 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:

1. Open the workspace of the document you wish to edit by **clicking** it in the **workspace pane**.
2. **Double click** on the document that you wish to edit and then choose **'Edit Document'**.
3. 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.
2. **Click** the workspace in which to save the template, **name the document** and **select** the **template** that you wish to use.
3. **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'**.
3. **Select** the **users** that the document should be **circulated to**.
4. **Click 'Send'** to circulate the document.

