Document Types

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Add Document Types to describe your "Attachments". This is a listing of any types of documents you can add to your customer's page or use as an attachment.

Adding a Document Type

Click "Add Document Type" in the upper left corner of the page.

Document Types



Code

Type a code to identify this document type. This can be an abbreviation of the document type name.

Document Types



Name

Input a name to describe the document type.

Update

Click update on the right side of the screen to save.