CM DOCUMENTS

CM Documents is a repository for documents you “link” with specific Accounts/Contacts.

TO LINK A SINGLE DOCUMENT

1. Open the document in PinPoint, then click the CM Link button located above the Doc Name field.
2. Select the Account/Contact you want the document linked to.
3. Click the Add button when finished.

TO LINK A FOLDER

1. Click Admin in the PinPoint menu, then go to Folders under Fileroom Management.
2. Select the Cabinet the folder belongs to.
3. Locate the Folder you want to link.
4. Under the Action column next to the folder, click the CM Link button.
5. Select the Account/Contact you want the folder linked to.
6. Click the Add button when finished.