

Held Documents

To view all documents currently on Hold, users can go to the Held Documents page.

Go to Admin > Fileroom > Documents on Hold within the PinPoint menu on the left.

Personal

Private

Default

Cabinet

<-- Select Cabinet -->

Doc Type

<-- Select Doc Type -->

From

Content

fx

Name

Doc Name

Search

Folder

<-- Select Folder -->

Doc Tab

<-- Select Doc Tab -->

To

AND

Search Folder

Tag

<-- Select Tag -->

Date Type

Doc Date

Metadata

Sub-Divider

<-- Select Sub-Divider -->

Folder Notes

Notes

Search

Clear

25

Action

DocID

Document

Cabinet

Folder

Sub-Divider

Doc Type

Document Tab

First Field

Second Field

Thirld Field

Document Date

Entry Date

fx

6491

ABC Company Invoice

Customers

ABC Company

Invoices

Invoice

Unpaid

3337

01-25-2016

93.50

02/08/2022

02/08/2022

Clear Hold

1. Select the documents you want to clear the hold for.
2. Click the Fx button above the documents list.
3. Click the button for Clear Hold, then click Yes to confirm.