

Setup for Cabinets/Doc Types

The setup page for Cabinets/Doc Types allows administrators to select from a predefined list of cabinets and document types to help in your initial setup. Only the master admin account can access the Setup page.

From the menu on the left-side of the screen, click Admin, then click Fileroom > Set Up.

Using the Cabinet dropdown, select the cabinet you would like to add to your PinPoint fileroom, then click the Add button. To update the cabinet after adding, go to the Manage Cabinets page.

Using the Doc Type dropdown, select the document type you would like to add to your PinPoint fileroom, then click the Add button. To update the document type after adding, go to the Manage Doc Types page.