

# A1712 - Make a document private - confidential

## Overview

In this section, you can make the document private (visible only by you) and share hit with other Users

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## Step-By-Step

### STEP 1

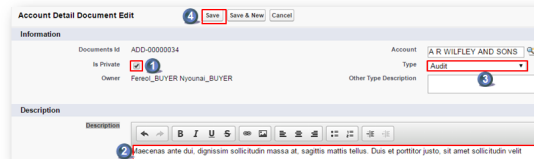
**Account Detail Document** . eg. "ADD-000000343"

1- Tick box "Is Private"

2- Fill **Description**

3- In View menu **Type**, eg. "Audit"

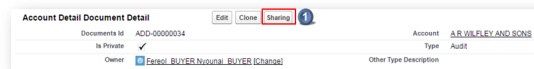
4- Click on **Save**



### STEP 2

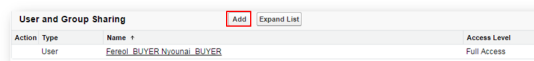
The document is private, it is visible only by the Owner.  
If you want to share it with other users

1- Account Detail Document Detail,  
Click on **Sharing**



### STEP 3

Click on "Add"



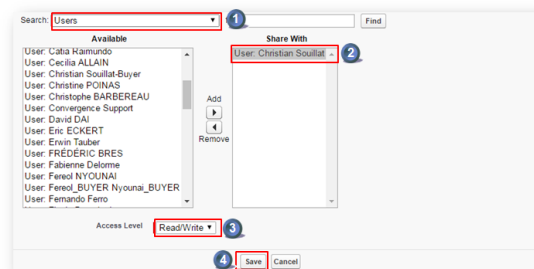
### STEP 4

1- In View menu Search Select "User"

2- Choose a name and click on the right arrow to add it in the column "Share with".

3- In View menu Access Level select "Read only or Read/Write"

4- Click on **save**



## Related articles

- [A1812 - Make a Visit Minute private - confidential](#)
- [A1510 - New RFI](#)

## Need help?

[How to ask for assistance?](#)

*Dear Salesforce Convergence user,*

For any question or issue regarding Convergence, please :

- create a request in **Service One** with the following information:
  - I want to update data in Convergence [Maintain data ownership in CONVERGENCE](#)
  - I want to mass upload procurement data [Maintain procurement data in CONVERGENCE](#)
  - Process : Data & Analysis
  - PTP-Subprocess: Purchasing Tools Support
  - PTP-Category: Convergence

For account creation, please refer to [here](#).

Thank you very much,

*Convergence Team.*