

A1712 - Make a document private - confidential

Overview

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

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Step-By-Step

STEP 1

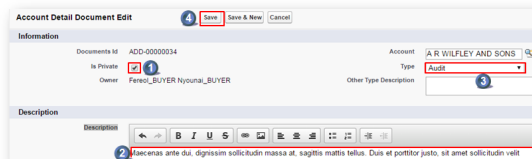
Account Detail Document . eg."ADD-000000343"

1- Tick box "Is Private"

2- Fill **Description**

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

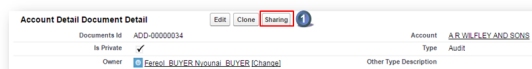
4- Click on **Save**



STEP 2

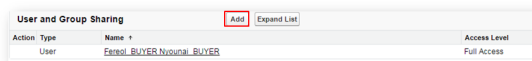
The document is private, it is visible only by the Owner.
If you want to share it with other users

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



STEP 3

Click on "Add"



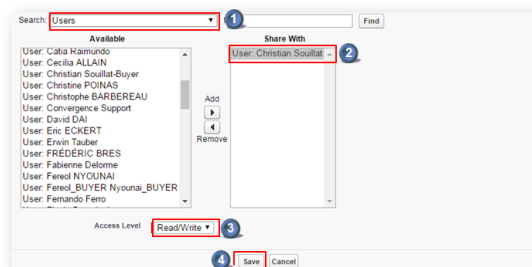
STEP 4

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.