

DocFynd - User Guide

About

This document explains how DocFynd works on the objects as per the configuration.

Pre-requisites

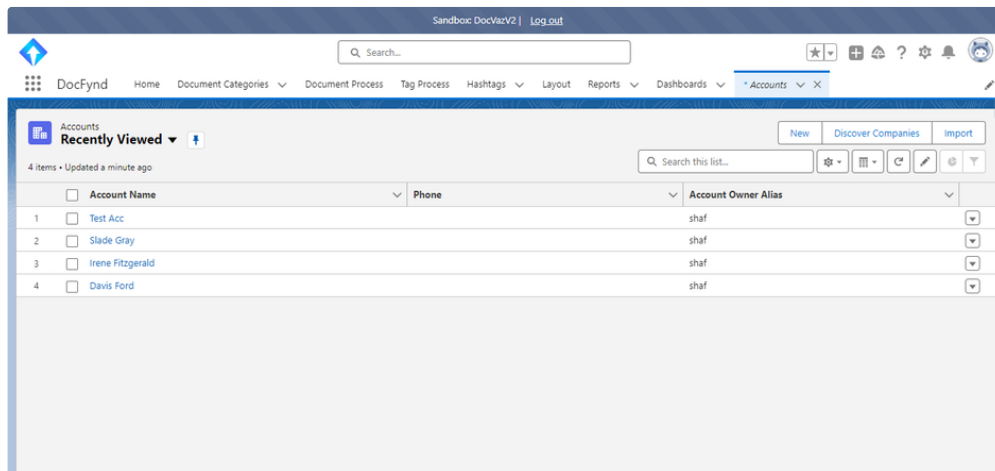
Configuration of the document process and tagging process for the required objects.

Steps

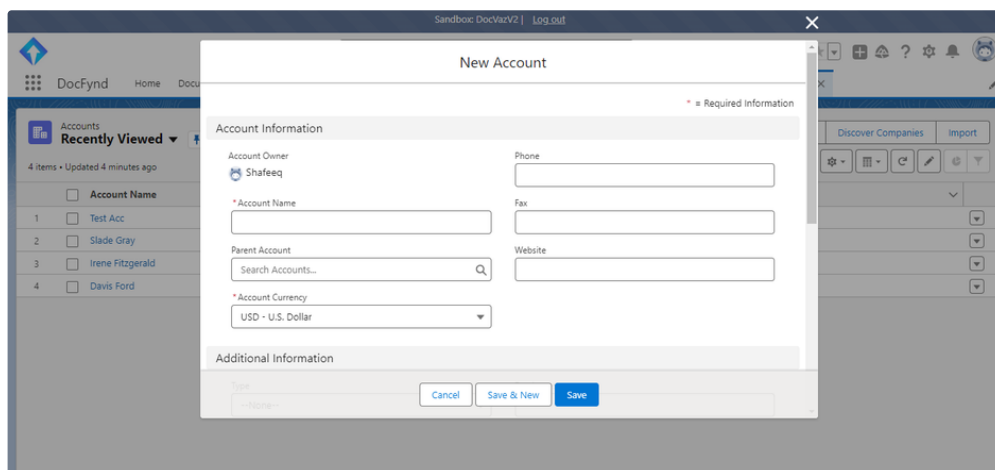
In this instance, we select two objects namely Account and Contact. The Account object is configured with the “Document Process”.

“Contact” object is configured with “Tag Process”

1. Select the **Account** object which is configured with the “Document Process”. You can select any object but ensure that the object has a document process configured.

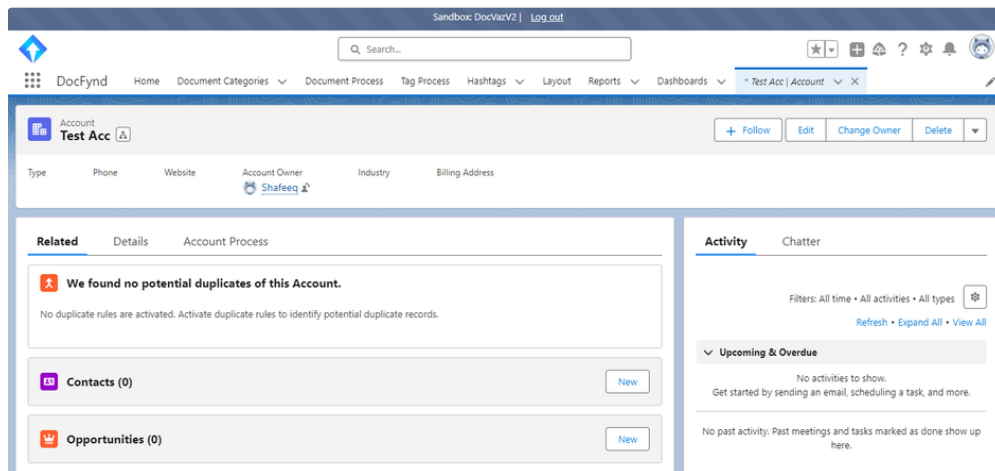


2. Create a new account. On clicking the “Save” button, new account will be created.

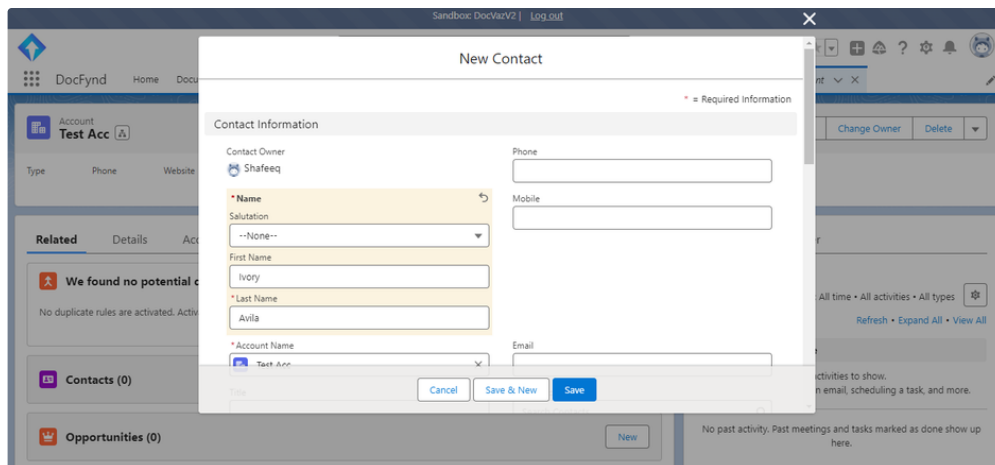


3. Select the newly created account and navigate to the record page.

4. In the Related tab, click **Contacts** child object which is configured with the “Tag Process”.

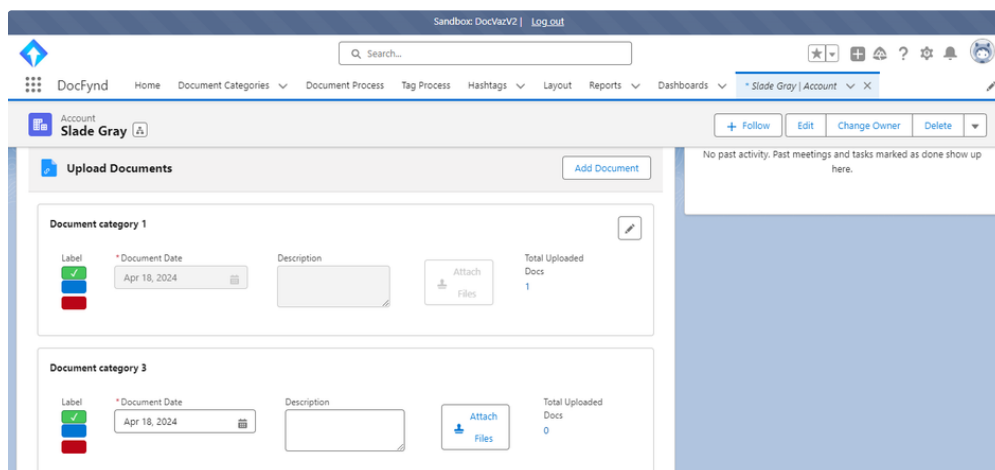


5. Create new contact with first name and last name.



6. Now, go to the newly created Account record.

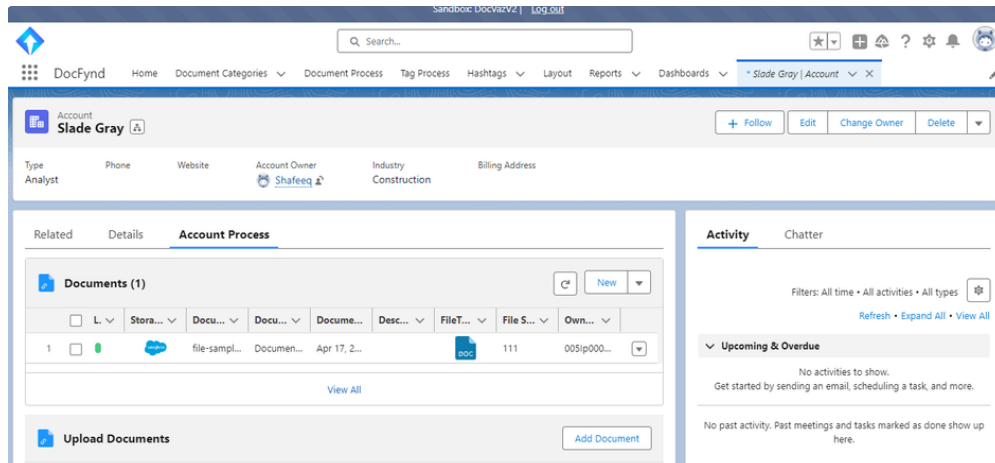
7. Select the “Documents” tab and click the “New” button. “Document Upload” screen will be displayed.



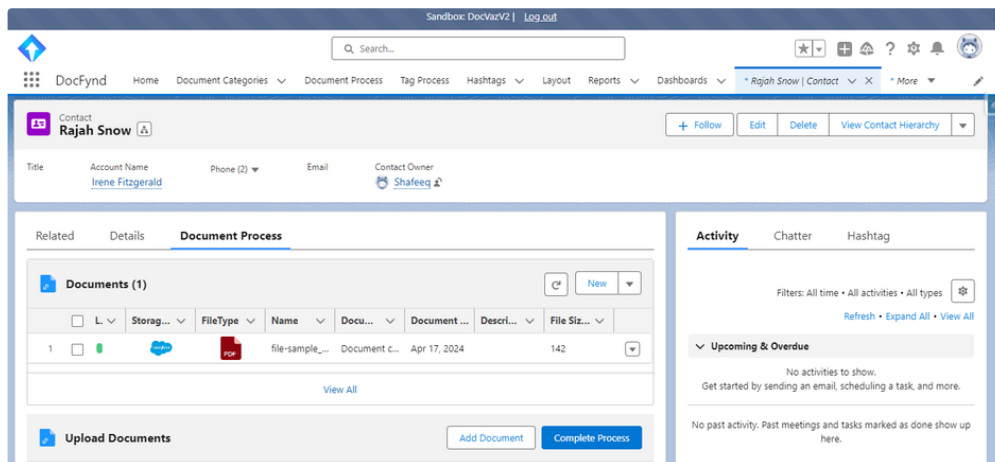
a. Select the required color for the label of the document

b. Select the date of the document

- c. Enter the "Description"
 - d. Click "Upload Files" to attach the documents. Document types that can be attached is retrieved from the document process configuration
 - e. "Total Uploaded Docs" will display the count of the documents that are uploaded.
8. After entering the details and uploading the documents, click "Complete Process" button. The criteria defined in the document process will be evaluated and executed on clicking this button.
 9. Now the documents will be available under the "Account" object with the specified labels.



10. Additionally, the documents will be tagged under the "Contact" object as well. This will be done automatically as per the tag process defined.



✓ This completes the document upload and tagging process execution.