

Core - Creating Required Docs Options

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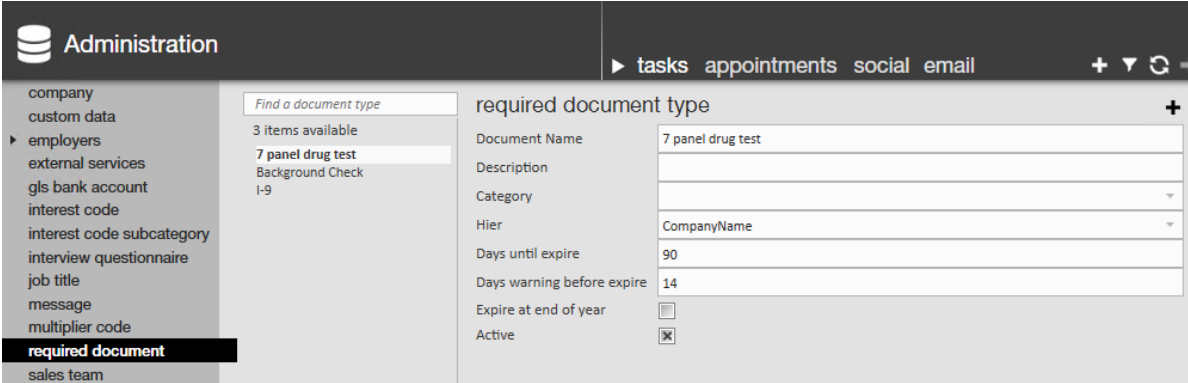
What are Required Docs?

Required documents allow you to store, track, and manage documents that are required for employees. Required documents can be set up on customer and order records to require a specific document type before an employee can be assigned to that order. Required docs can be saved and searched on the employee record to make managing documents a breeze.

Before a required doc can be set for a customer, order, or saved on an employee record, the required document type must first be set up under Administration.

Adding Required Document Types:

1. Navigate to all options > administration.
2. Select 'required document' on the left:



The screenshot shows the 'Administration' section of a software interface. On the left, a navigation menu lists various options, with 'required document' highlighted. The main area is divided into two panels. The left panel, titled 'Find a document type', shows a search bar and a list of three items: '7 panel drug test' (selected), 'Background Check', and 'I-9'. The right panel, titled 'required document type', contains a form with the following fields: 'Document Name' (7 panel drug test), 'Description' (empty), 'Category' (dropdown), 'Hier' (CompanyName dropdown), 'Days until expire' (90), 'Days warning before expire' (14), 'Expire at end of year' (checkbox), and 'Active' (checkbox).

3. Select the + icon on the right.
4. Enter the following information:
 - o Document Name.
 - o Optionally, add a description to further explain to recruiters or sales when this document type should be used.
 - o Hier: select the [hierarchy](#) level this field applies to (ex. is it only for temp

- employees or for one specific branch, etc.)
- Optionally, add days until expire to add an automatic expiration date to each document set to this type.
 - Optionally, check the 'Expire at end of year' to have the document automatically expire at the end of each year.
 - Active: Uncheck this box to have this custom data field deactivated (no longer seen or able to use).

required document type +	
Document Name	7 panel drug test
Description	
Category	
Hier	CompanyName
Days until expire	90
Days warning before expire	14
Expire at end of year	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>

5. Select the  icon in the upper left to save your changes.

Related Articles