

Entered Docs

SUMMARY

The "Entered Docs" feature allows admins to keep track of documents that have been entered into an accounting system or any other external system that's part of your transaction management workflow.

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Enable Entered Docs


When this feature is enabled, an "Entered" checkbox will be shown on transactions' documents. You can then mark documents as entered after adding them into your accounting system such as Quickbooks, Lonewolf, or another external system.

Enable Entered Docs:

- 1 Go to [Admin / Settings](#) by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Click the checkbox next to [Enable Entered Docs feature].
- 3 Click [Save Settings].



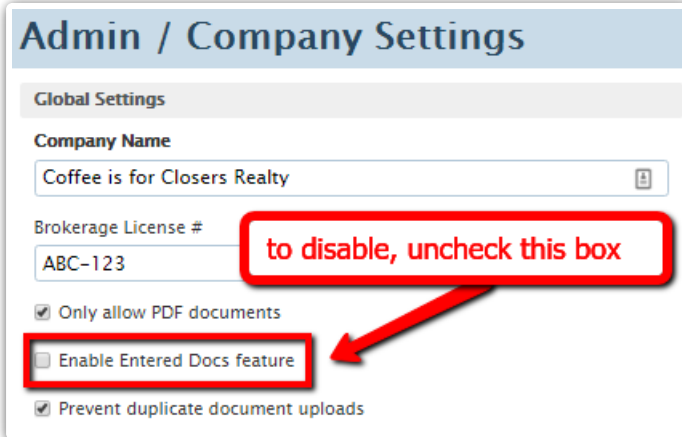
The screenshot shows the 'Admin / Company Settings' interface. Under the 'Global Settings' section, there are three input fields: 'Company Name' (with the value 'Coffee is for Closers Realty'), 'Brokerage License #' (with the value 'ABC-123'), and a list of checkboxes. The 'Enable Entered Docs feature' checkbox is currently unchecked, while 'Only allow PDF documents' and 'Prevent duplicate document uploads' are checked.

 This feature can only be enabled by a master admin. When enabled, control who marks docs as entered by granting the "Can enter documents" permission to appropriate admin users.

Disable Entered Docs

To disable the Entered Docs feature:

- 1 Go to **Admin / Settings** by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Uncheck the checkbox next to [Enable Entered Docs feature].
- 3 Click [Save Settings].



The screenshot shows the 'Admin / Company Settings' interface. Under the 'Global Settings' section, there are several fields and checkboxes. The 'Enable Entered Docs feature' checkbox is highlighted with a red box, and a red arrow points to it from a callout box that says 'to disable, uncheck this box'. Other settings include 'Company Name' (Coffee is for Closers Realty), 'Brokerage License #' (ABC-123), 'Only allow PDF documents' (checked), and 'Prevent duplicate document uploads' (checked).

Admin / Company Settings

Global Settings

Company Name
Coffee is for Closers Realty

Brokerage License #
ABC-123

Only allow PDF documents

Enable Entered Docs feature

Prevent duplicate document uploads

to disable, uncheck this box