

Form Shares

Contacts, Documents, Resources, and Forms can be shared across business units. By sharing, you are creating a link to the original source record. This does not duplicate the record, so any changes made will impact all shares. To share a contact record, click the appropriate icon in the navigation bar, then click Share to select which record will be shared and its destination.

Manage Shared Documents

Selection What's This ?

- Backups
- Business Group
- Corp
- DD
- Enterprise Data
- Enterprise DR Exercise
- KW
- New Org
 - Documents
 - Events
 - Plans
- NYDOH

Browse Filter - Results

Destination What's This ?

- New Org
 - Documents
 - Events
 - Plans
 - Plan 1
 - Plan 2
 - Documents

Browse Filter - Results

Local Folder Shares

No items to display

To view where the record is shared, as well as the subscription categories the record is subscribed to, if any, for each folder, click the Shares tab from the contact record. Click the pencil icon to edit the share or the delete icon to remove it.

Contacts

General
Contact-Methods
Account
Photo
Relationships
Shares
Forms
Locations
Properties

Item ↓	Original Location	Shared Location	Subscription Category	Action
Jane Doe	Contacts	Contacts		

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