

Document Categories

The Categories tab allows you to index the document record with categories and additional searching capabilities.

1. To select a category for a document, click Documents in the navigation bar, then open the document record.
2. Click the Categories tab.
3. Click a category to select it and add it to the Current Categories section. The available categories are configured in the [Referential Data](#) settings.

Documents

General Files Relationships **Categories** Shares Properties

Available Categories

- 💡 General
- 💡 Miscellaneous
- 💡 Test
- 💡 Weather

Browse Filter - Results

Filter **Reset**

Current Categories

- 🗑 Miscellaneous