Shareable Content

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Shareable Content

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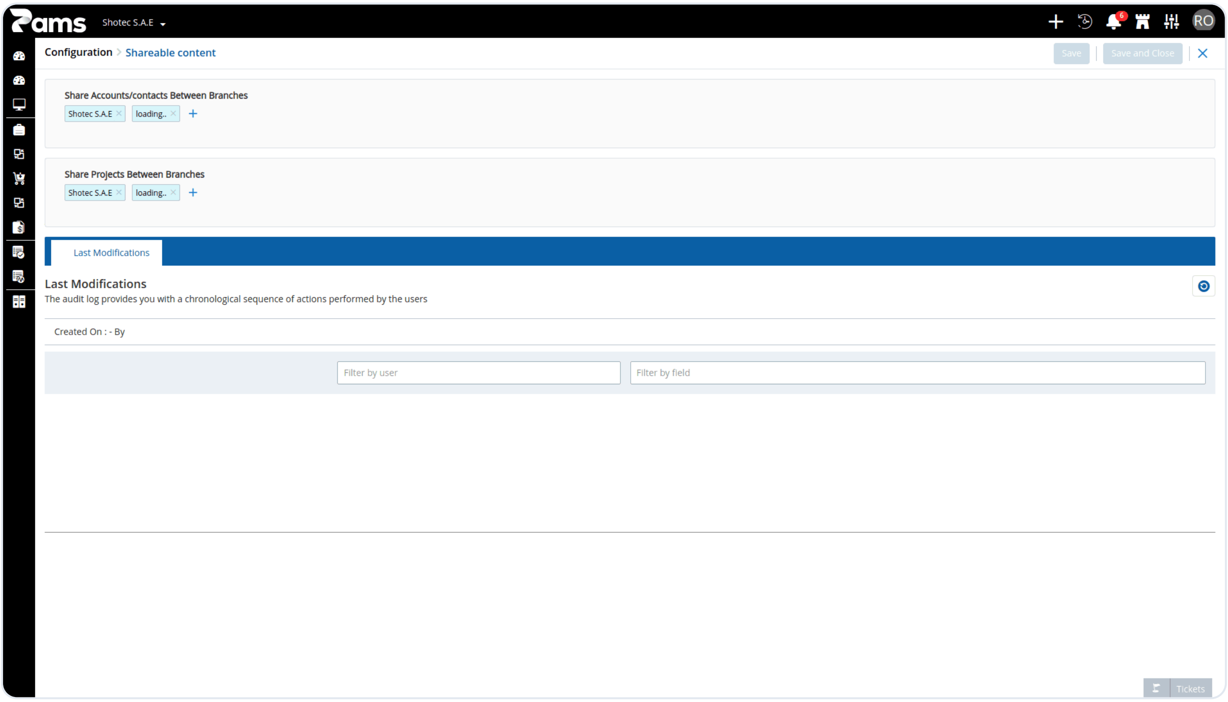

Shareable content — Configurations › Shareable Content

Overview

Use Shareable Content to prepare and save a selected set of content for later access from the Shareable content screen. Sales representatives, account managers, project managers, purchasing officers, warehouse managers, and finance officers can use the available filters to narrow the content they are working with, select relevant items, and attach files where required.

Use this feature when you need to maintain a focused set of items rather than working with all available content at once.

Settings

Open **Configurations** > **Shareable Content** to access the Shareable content screen.

Before saving content, define the selection that you want to keep:

Field	Purpose
Filter by user	Narrows the content by user.
Filter by field	Narrows the content by field.
Selected items	Shows or holds the items selected for the shareable-content record.
Files (files[])	Holds files associated with the selected content.

> **Tip:** Apply filters before selecting items. This helps you review a smaller, more relevant set of content.

Workflow

1. Open **Configurations** > **Shareable Content**.
2. Decide whether you need to work with all available content or a limited set of content.
   - To limit the content by responsible user, use **Filter by user**.
   - To limit the content by a field, use **Filter by field**.
   - If no filtering is required, leave the filters unchanged and continue with the available content.
3. Review the resulting content and define the set to retain in **Selected items**.

   Use this field to confirm that the items relevant to the current purpose are included. If the selection is not appropriate, revise the filters or selected items before saving.
4. Decide whether supporting documents are required.
   - If files are required, use **Attach** and add them under **Files (files[])**.
   - If no supporting files are needed, continue without attachments.

   > **Note:** Use attachments only when they are relevant to the selected items. Review the files before saving to avoid retaining unrelated documents.
5. Choose how to complete the record.

  - Select **Save** to save your selections and remain on the Shareable content screen for further review or changes.
  - Select **Save and Close** to save your selections and close the screen.
  - If a confirmation message is displayed, select **Ok** to acknowledge it.

6. If you need to revisit the saved activity, use **logHistory** where available. Use the update icon **icn icn-update** when you need to refresh the displayed information.

> **Warning:** Do not select **Save and Close** until you have checked both **Selected items** and **Files (files[])**. Closing the screen ends the current editing session.

Examples

A project manager is preparing a focused content set for a project handover review.

1. The project manager opens **Configurations** > **Shareable Content**.
2. In **Filter by user**, the project manager selects the user responsible for the handover documents. In **Filter by field**, the project manager applies the relevant project-related field filter.
3. The project manager reviews the filtered results and adds the relevant handover materials to **Selected items**. Items that do not relate to the handover are left out of the selection.
4. The project manager selects **Attach** and adds the supporting handover file to **Files (files[])**.
5. After checking the selected items and attached file, the project manager selects **Save and Close**. The selected content and associated file are saved.

Tips

> **Tip:** Use **Filter by user** when you need to isolate content associated with a specific colleague or responsible person.

> **Tip:** Use **Save** rather than **Save and Close** when you expect to continue reviewing filters, selected items, or files.

> **Note:** Use **icn icn-update** to refresh the screen when you need to review the current displayed information again.

Troubleshooting

Symptom	Likely cause	Fix
The content list is too broad to review efficiently.	No filter has been applied, or the current filter is too broad.	Use **Filter by user** and/or **Filter by field** to narrow the displayed content.
Relevant content is missing from **Selected items**.	The current filtering criteria may exclude the required item, or the item has not been selected.	Review **Filter by user** and **Filter by field**, then update **Selected items** as needed.
A supporting document is not included with the saved content.	The file was not attached before saving.	Select **Attach**, confirm that the document appears under **Files (files[])**, and then select **Save** or **Save and Close**.
The screen does not show the information expected after changes.	The displayed information may need to be refreshed.	Select **icn icn-update** and review the updated screen.

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