

How to create your first Office-document in
Cartularius, the Salesforce app for document
management.



CARTULARIUS

DOCUMENT MANAGEMENT



Type Phone Website www.cartularius.com Account Owner [Martijn Buurman](#) Industry Billing Address
Keizersgracht 520 H
1017 EK Amsterdam
Netherlands

Related Details **Documents**



Files

Show Hidden

New Document New Folder Cut Copy Paste Refresh

Folders Demo account

▼ Demo account

Contacts

Signees

<input type="checkbox"/>	Name ↑	Category	Description	Size	Owner	Last Modified
<input type="checkbox"/>	Contacts	Folder				
<input type="checkbox"/>	Signees	Folder				



Navigate to the "Documents" section on an account



Type	Phone	Website www.cartularius.com	Account Owner Martijn Buurman	Industry	Billing Address Keizersgracht 520 H 1017 EK Amsterdam Netherlands
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Related Details **Documents**

Files

Show Hidden

New Document

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Refresh

Folders

Demo account

Demo account

Name ↑

Category

Description

Size

Owner

Last Modified

Contacts

Folder

Signees

Folder



Click the "New Document" button

New Document

Microsoft Word

Microsoft Excel

Microsoft PowerPoint

Cancel Create



Click the desired document type

New Document



Microsoft Word



Microsoft Excel



Microsoft PowerPoint

Filename

Document demo

Category

Select file category

Cancel


Create





Type a document name in the "Filename" textbox

Category	Description	Size	Owner	Last Modified
Folder				
Folder				

New Document

 Microsoft Word

 Microsoft Excel

 Microsoft PowerPoint

Filename:

Category:



Click the "Select file category" dropdown box

Show Hidden

New Document

New Folder

Cut

Copy

Paste

Refresh

Demo account

Name ↑	Category	Description	Size	Owner	Last Modified
Contacts	Folder				
Signees	Folder				

We found no potential duplicates of this A

06

Activity Chatter



Filters: All time

Upcoming & Overdue



No activities to show.

Past meetings and tasks marked as done s

New Document



Microsoft Word



Microsoft Excel



Microsoft PowerPoint

Filename

Document demo

Category

Select file category

Design Document

Identification

Invoice

Letter

Other

Purchase Contract

Sales Contract



Click "Letter" for the file category

Show Hidden

New Document

New Folder

Cut

Copy

Paste

Refresh



Demo account

<input type="checkbox"/>	Name ↑	Category	Description	Size	Owner	Last Modified
<input type="checkbox"/>	Contacts	Folder				
<input type="checkbox"/>	Signees	Folder				

We found no potential duplicates of this A

07

Activity Chatter



Filters: All time

Upcoming & Overdue



No activities to show.

Past meetings and tasks marked as done s

New Document



Microsoft Word



Microsoft Excel



Microsoft PowerPoint

Filename

Document demo

Category

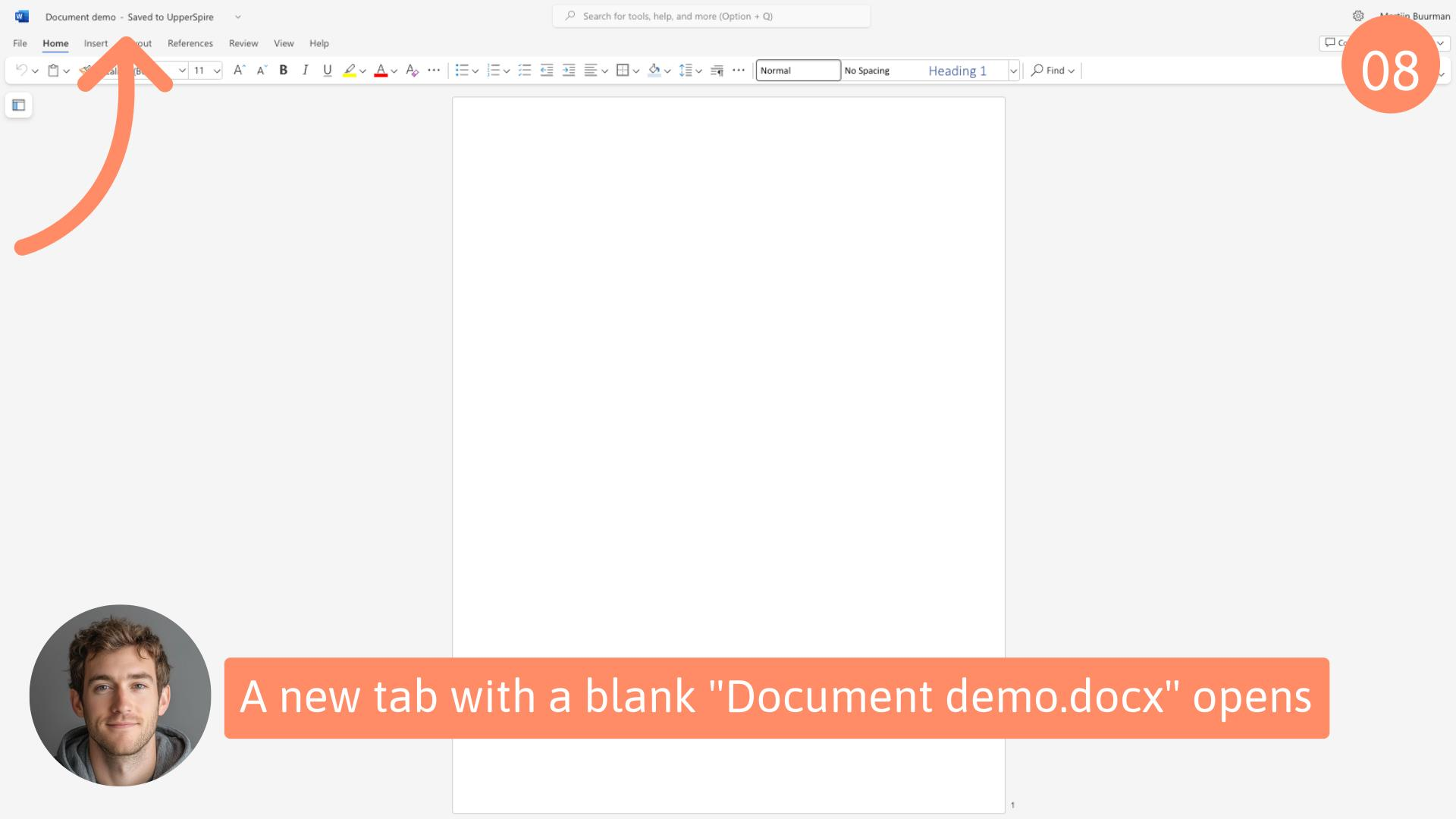
Letter



Create



Click the "Create" button to create the Word-document



A new tab with a blank "Document demo.docx" opens





File Home **Insert** Layout References Review View Help

↶ ↷ 📄 ✎ Calibri (Body) 11 A[^] A[~] **B** *I* U 🖋️ A A



Click "Insert" to insert content into the document



File Home Insert Layout References Review View Help



Page Break



Table



Picture



Link



Table of Contents



Bookmarks



More options



Click "Picture" to insert a picture



Insert Picture From

 This Device

 OneDrive

 Stock Images

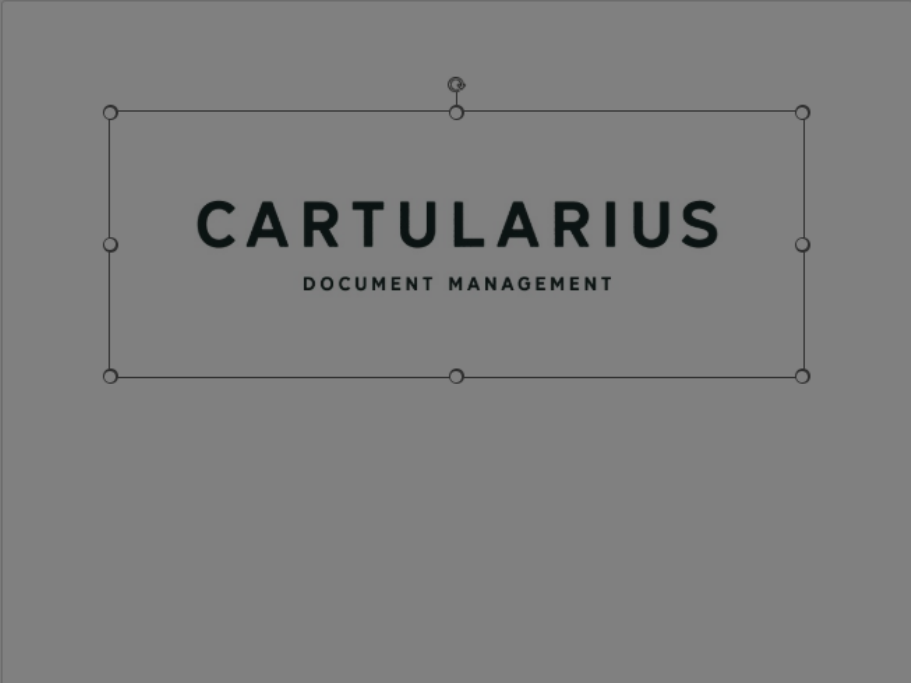
 Search on Web



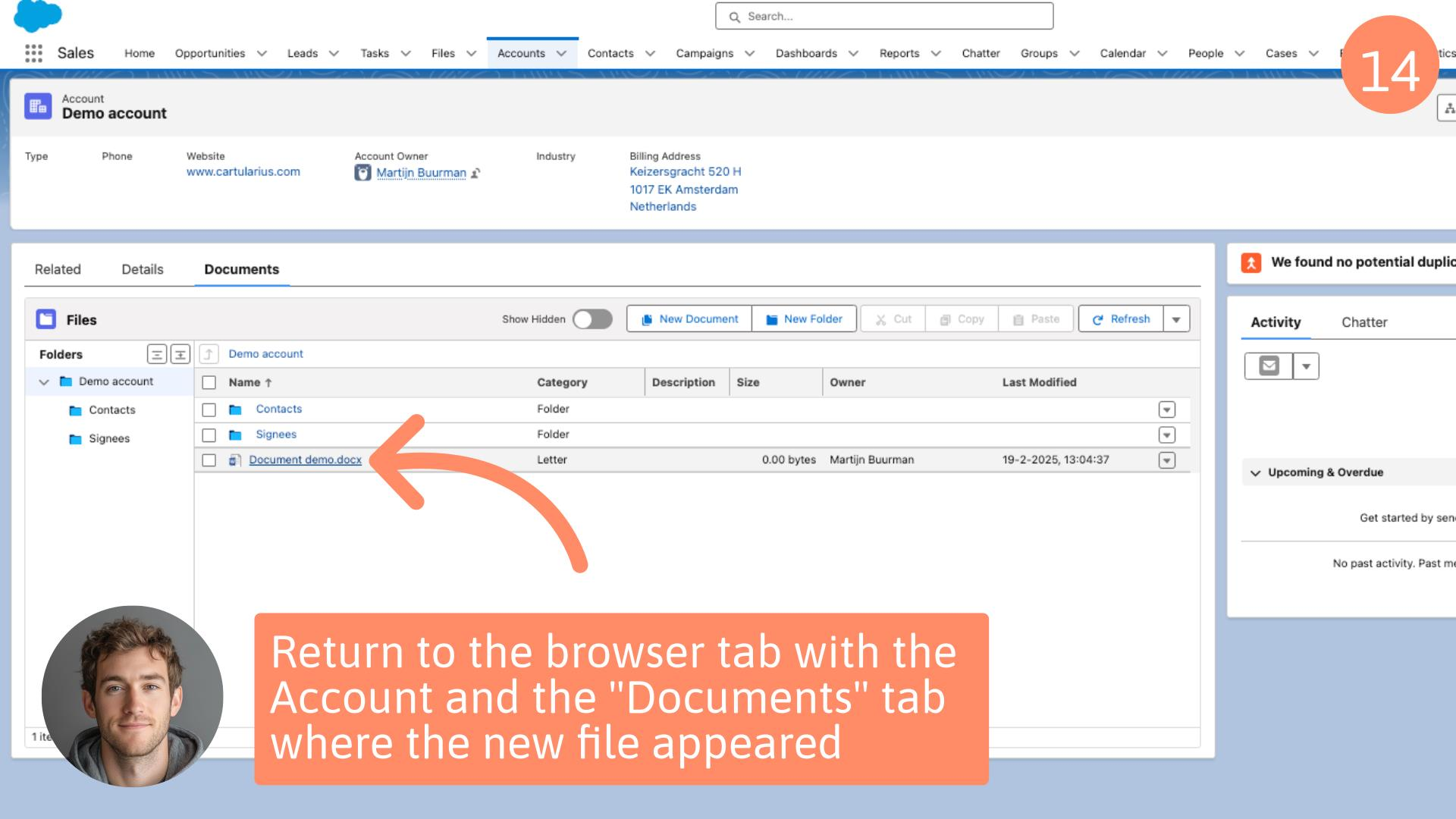
Click "This Device" to insert a picture from a local drive



We selected a Cartularius logo to insert in the document



Close the document by closing this browser tab



Account Demo account

Type Phone Website www.cartularius.com Account Owner Martijn Buurman Industry Billing Address Keizersgracht 520 H 1017 EK Amsterdam Netherlands

Related Details Documents

Files Show Hidden New Document New Folder Cut Copy Paste Refresh

Folders	
▼ Demo account	
Contacts	
Signees	

Name ↑	Category	Description	Size	Owner	Last Modified
<input type="checkbox"/> Contacts	Folder				
<input type="checkbox"/> Signees	Folder				
<input type="checkbox"/> Document demo.docx	Letter		0.00 bytes	Martijn Buurman	19-2-2025, 13:04:37



Return to the browser tab with the Account and the "Documents" tab where the new file appeared



We found no potential duplic...

Activity Chatter

▼

▼ Upcoming & Overdue

Get started by sen...

No past activity. Past me...

Account **Demo account**

Type Phone Website www.cartularius.com Account Owner **Martijn Buurman** Industry Billing Address Keizersgracht 520 H 1017 EK Amsterdam Netherlands

Related Details **Documents**

Files Show Hidden New Document New Folder Cut Copy Paste Refresh

Folders Demo account

- Demo account
 - Contacts
 - Signees
 - Document demo.docx**

Name ↑	Category	Description	Size	Owner	Last Modified
Contacts	Folder				
Signees	Folder				
Document demo.docx	Letter		51.68 KB	Martijn Buurman	19-2-2025, 13:05:10



Click the filename to open the document details page



We found no potential duplic...

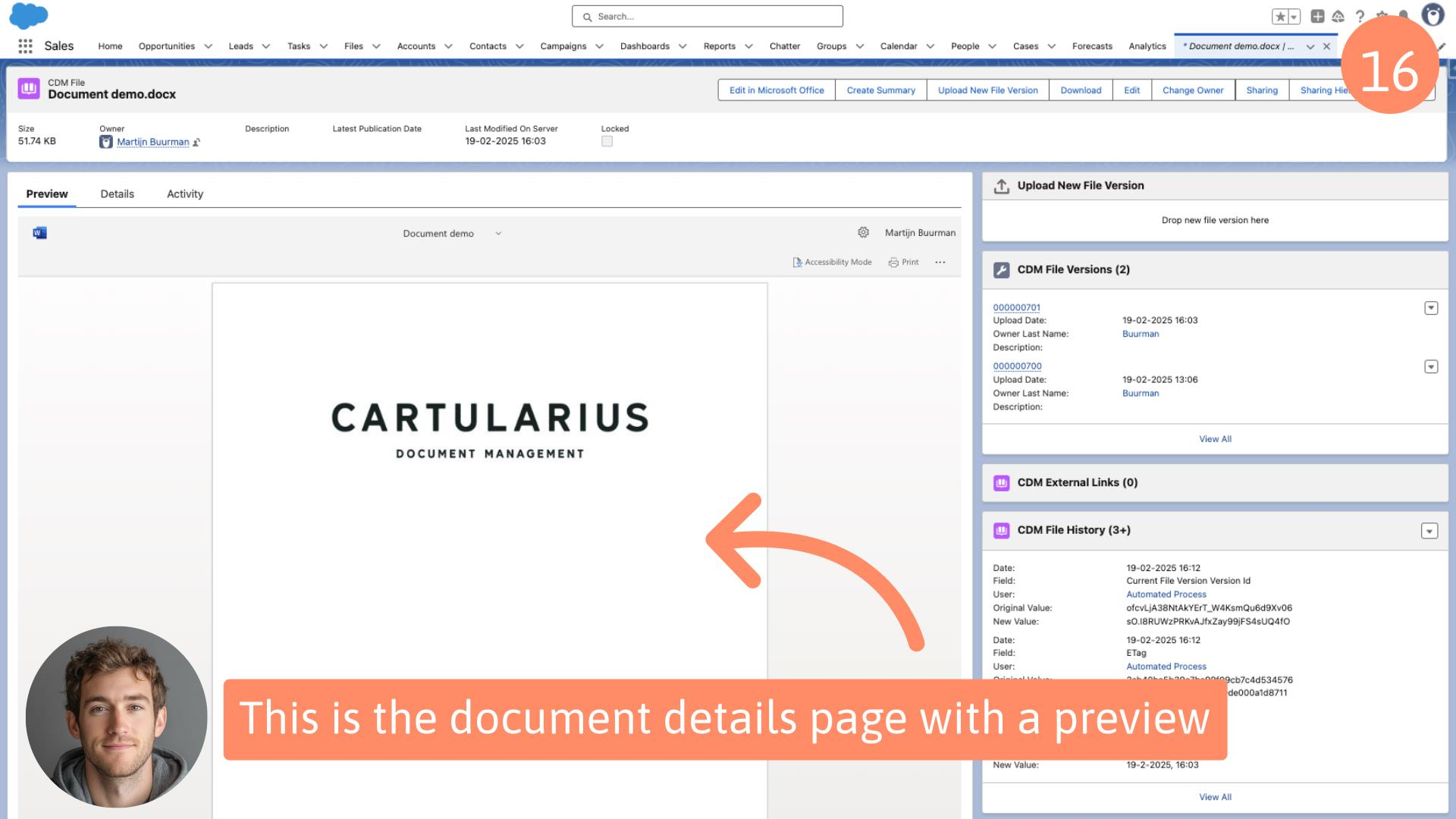
Activity Chatter

[Dropdown]

Upcoming & Overdue

Get started by sen...

No past activity. Past m...



16

Preview Details Activity

Document demo Martijn Buurman Accessibility Mode Print

CARTULARIUS
DOCUMENT MANAGEMENT

Upload New File Version

Drop new file version here

CDM File Versions (2)

000000701	Upload Date: 19-02-2025 16:03
	Owner Last Name: Buurman
	Description:
000000700	Upload Date: 19-02-2025 13:06
	Owner Last Name: Buurman
	Description:

[View All](#)

CDM External Links (0)

CDM File History (3+)

Date:	19-02-2025 16:12
Field:	Current File Version Id
User:	Automated Process
Original Value:	ofcvLJA38NtAKYERt_W4KsmQu6d9Xv06
New Value:	s0IBRUWzPRKvAJfxZay99JF54sUQ410
Date:	19-02-2025 16:12
Field:	ETag
User:	Automated Process
Original Value:	2eb201c5b2027b0009cb7c4d534576
New Value:	de000a1d8711

[View All](#)



This is the document details page with a preview

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