

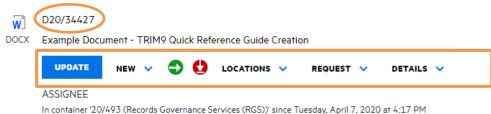
Quick Reference Guide – Changing the Title of a Record in the TRIM9 Web Client

Changing the Title of a Record

You can change the title of a record (Cabinet, Folder, Sub-Folder, Document, Email etc.) if you have made an error or you need to add additional information.

To change the title of a record in the TRIM9 Web Client:

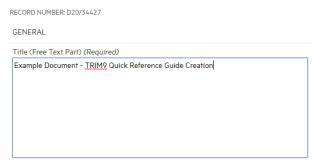
- 1. Locate the record for which you want to change the title.
- 2. Ensure the options for the record such as UPDATE, NEW, LOCATIONS etc. are displayed. If not, click on the record number once to display them:



Click the **UPDATE** button:



4. The Record Entry Form for that record will display. The 'Title' field should display towards the top of the Record Entry Form (but depending on which record type you are changing the title for, may not always be the first field):



5. Update the 'Title' field as required, then select **SAVE** to save the changes:

