

## IN THIS ISSUE

✗ Placing New Documents into Folders

## Placing New Documents into Folders

To avoid having to place the attachment into the folder after it is attached, make sure to do the following:

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1. Access the a	appropriate client through <b>SE</b>	ARCH and click A	TTACHMENTS on t	he <b>Client</b> mer	nu.
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Folder View G- Planters Nuts Folder	attachments [ Add New ] De ails Attachment Name	LOB/Policy # Cert #/Ref #	K <b>∢Showing Page 0 of 0</b> ▶ M Category Description Doc Type State		[DMS] Filters: [Sho Greated By Updated By
2. Select the f	folder where the document v	will be placed wh	nen added and		



3. In the Add New Attachment dialog box, select the appropriate document option. Complete required fields for the attachment type selected and click Next >>. In the example shown below, the Attachment Name, Document Description and Document Type fields are required.

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		Document Type: Micros	soft Word							
	-		Cancel	Next >>	-					
4. When the attachment is saved, it is placed into the folder that was selected before the <b>[Add New]</b> link was selected.										
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Recycle Bin										