

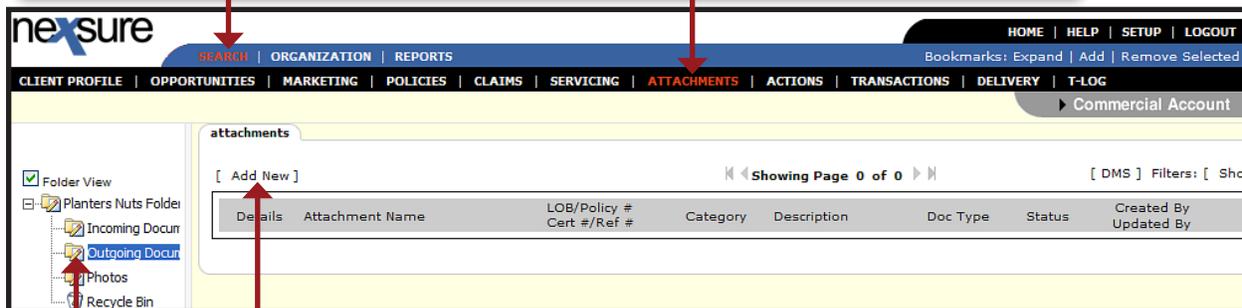
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Placing New Documents into Folders

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

1. Access the appropriate client through **SEARCH** and click **ATTACHMENTS** on the **Client** menu.



2. Select the folder where the document will be placed when added and click the **[Add New]** link to open the **Add New Attachment** dialog box.

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.

4. When the attachment is saved, it is placed into the folder that was selected before the **[Add New]** link was selected.

Details	Attachment Name	LOB/Policy # Cert #/Ref #	Category	Description	Doc Type	Status	Created By Updated By
	updated drivers list			review requested	MS Word	Draft	Mary Oberleitner Mary Oberleitner