

Chapter 10

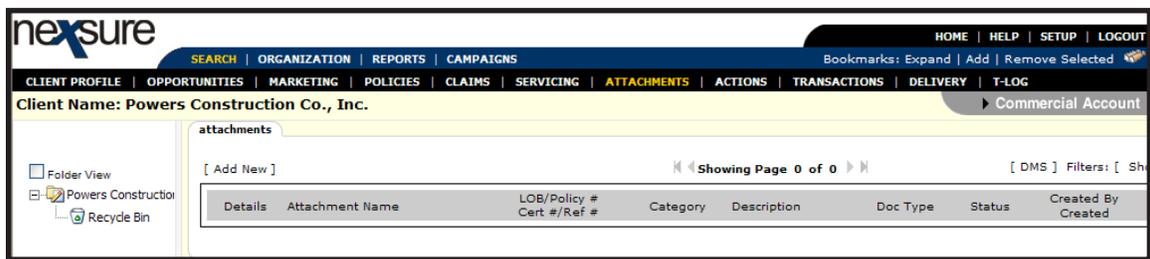
Attachment Folder Setup

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Attachment Folder Setup

Attachment folders are used to manage and organize client attachments at Client level. To view attachment folders, click **ATTACHMENTS** on the **Client** menu. When the attachments tab is first displayed, all attachments for the selected client are shown. The **Folder View** panel is on the left of the attachment summary. By default, each client has a root level Client Folder containing all client attachments and a Recycle Bin. The Client Folder and Recycle Bin are always active and cannot be deleted.



To manage and organize attachments, up to 100 folders per organization can be added. Any folders added at client level are propagated to all clients in the Organization. Administration of the Organization's folder structure is handled directly at the client level. Only staff members with security rights to Add, Modify or Delete folders can respectively add, copy, delete or rename folders in a client.

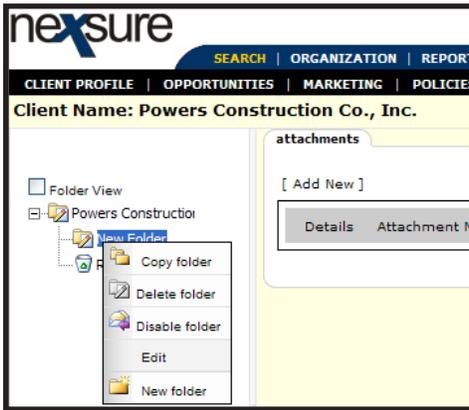
HOW to Add a New Folder

Search for and select a client. Click the **ATTACHMENTS** link on the **Client** menu. The **Folder View** panel is on the left of the attachment summary. If this is the first folder being added, right mouse click on the **Client Name** folder to display the context tool menu. Select the menu option for **New Folder**. In the illustration that follows, a new folder is being added under the root level **Client Folder**.

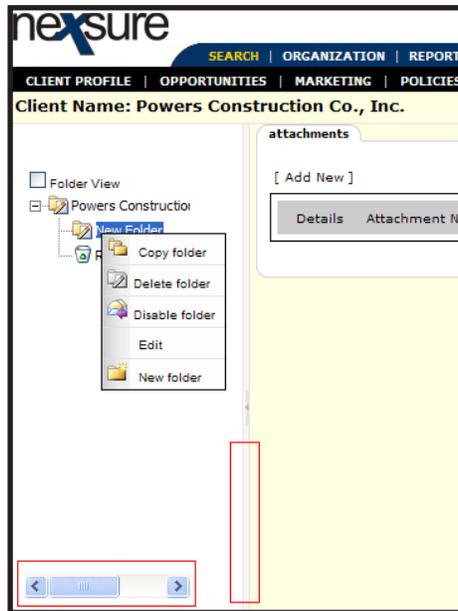




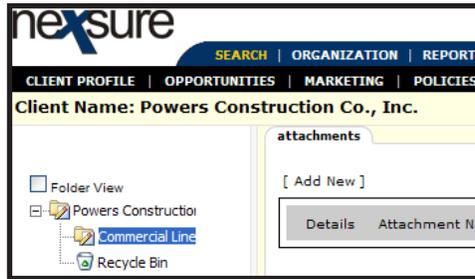
To name the new folder, right-click on the folder and select **Edit**. The new folder name becomes editable.



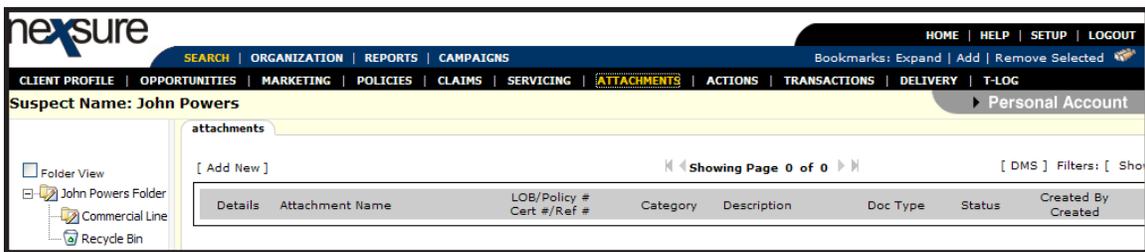
Note: The folder panel may be re-sized by placing your cursor on the vertical scroll bar until it turns into a double headed arrow. Drag the scroll bar to the left or right to view text that may be hidden from view.



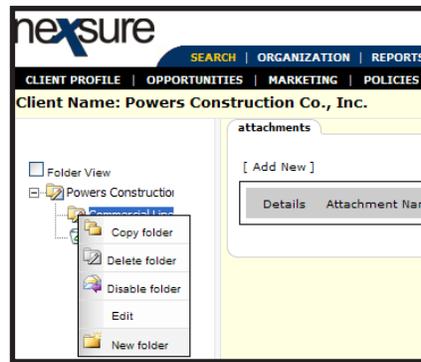
Type the new folder's name and click **Enter**.



The new folder propagates to all clients in the Organization.



To add a subordinate folder, right-click on the parent folder under which the new folder will be added and select **New Folder** from the menu. Right-click on the new folder and select **Edit**; enter the folder's name and click **Enter** to accept and save the name of the new folder.

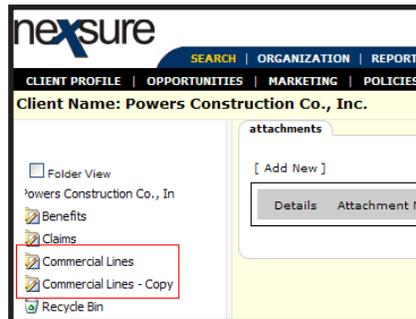


HOW to Copy a Folder Structure

An existing folder structure can be copied. A folder structure includes the selected folder and all of its subordinate folders. Attachments in the original folder structure are not copied. Copy a folder structure by right-clicking on the folder to view the context menu and selecting **Copy folder**.



The copied folder displays on the tree appended by the word **Copy** to identify it as a copy of the original folder structure.



To rename the copied folder, right-click on the folder; select **Edit** on the context menu; enter the folder name in the folder name field and click **Enter** to accept and save the folder name change. Repeat for each folder in the copied structure to be renamed.



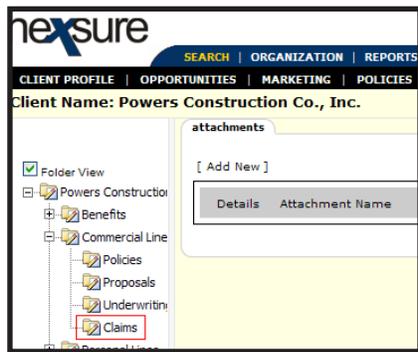
HOW to Rename a Folder

A folder may be renamed at any time by right-clicking and selecting **Edit** in the context menu. The folder name field opens for editing. Enter the name in the folder name field and click Enter to accept and save the folder name change.



HOW to Combine and Reorganize Folders

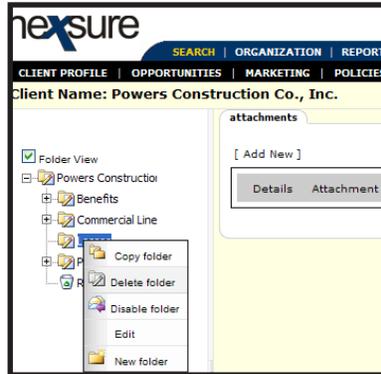
Folders can be combined or reorganized using drag-and-drop. A folder can be dragged over to another folder and dropped in order to combine the folders, or to set up child/parent folder relationships. Select the folder to be moved and drag it to the destination folder structure.



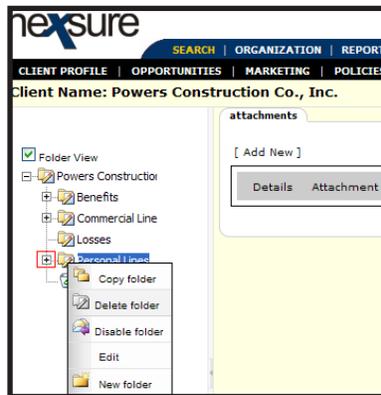
Note: Any changes made to folders will automatically propagate to all clients in the organization.

HOW to Delete Folders

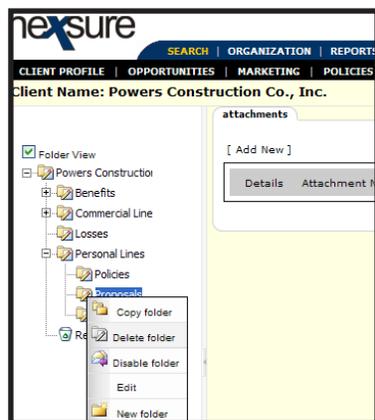
Folders can be deleted from the folder structure. To delete a folder, right-click on the folder to be deleted and select **Delete folder** from the context tool menu.



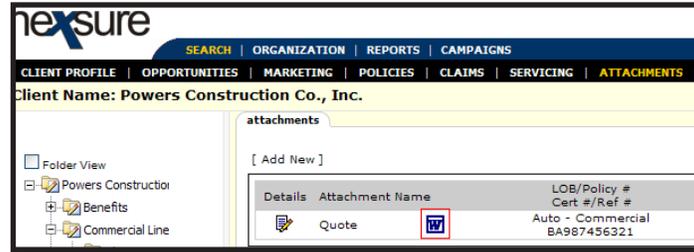
Deleting a folder will also remove all of its sub-folders. Sub-folders are indicated by a plus (+) sign to the left of the folder name.



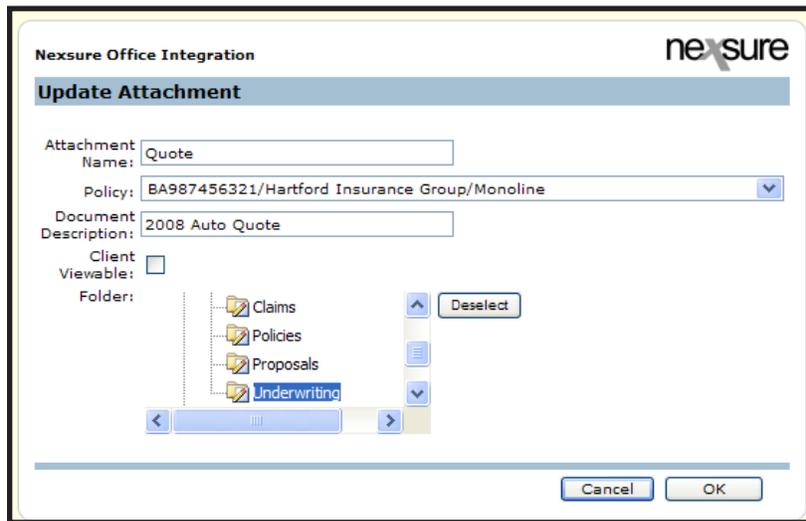
To delete a single folder in a folder structure, expand the folder and select the individual folder. If the selected folder has sub-folders, the folder and its subordinates will be deleted.



Attachments that are in a deleted folder are placed in the root level **Client Folder**. Users can reassign attachments to another folder by clicking the document type icon to the right of the client name on the attachments summary.



The **Update Attachment** dialog box is displayed. In the **Folder** area, select the folder to which the attachment is to be moved. The folder is highlighted. If a folder is selected in error, click the **Deselect** button. Click **OK** to add or move the attachment to the folder. Click **Cancel** to abort.

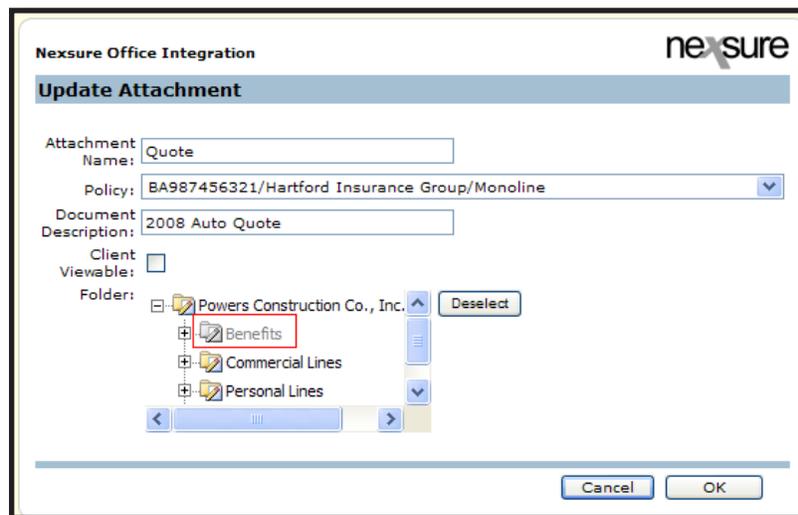


HOW to Disable/Enable Folders

The **Disable folder** option on the right-click folder context tool menu will inactivate a folder. A disabled folder displays a dimmed **Folder** icon.



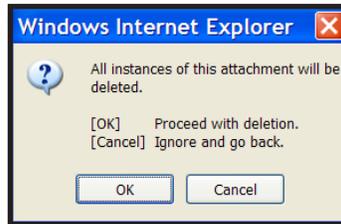
The attachments in a disabled folder can be viewed and modified, but users will not be able to save any new documents to the disabled folder. If the disabled folder is selected, the **[Add New]** link is not available to add a document to the selected folder. The folder is also disabled in the **Update Attachment** dialog box accessed by clicking the document type icon to the right of the attachment name.



When a folder is disabled, the **Enable folder** option is active on the right-click context tool menu. **Disable folder** and **Enable folder** options will never be available at the same time. When a folder is enabled, it is active again and users will be able to add attachments to the folder.

HOW to Manage the Recycle Bin

Individual attachments are deleted by clicking the **Remove**  icon of the attachment from the **attachments** summary view. An alert pop-up displays a warning message that all instances of the attachment will be deleted. Click **OK** to delete the attachment or **Cancel** to abort the removal of the attachment.



Deleted attachments are placed in the **Recycle Bin** . Select the **Recycle Bin**  to display its contents. Click the **Remove**  icon to permanently remove the attachment.



Note: Security user rights control the ability to delete attachments. Separate user rights control the ability to permanently delete attachments from the **Recycle Bin** .

For information about attachments, see “Attachments”, Chapter 17, *CRM Training Manual*.

