

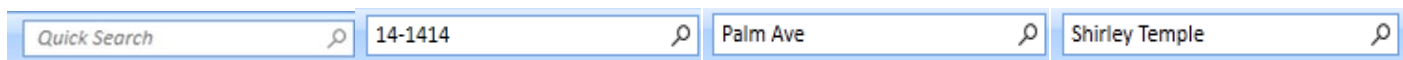
Using Recent Folders – Part 2

Open the door to your folders! Have you ever wanted to find a folder by something other than the Folder Name? Well you can!

The "key" is to add additional criteria, such as; Buyer Name, Seller Name, or Property Address in Quick Search.* Adding an attachment to a folder or searching for a folder is much faster using the common items that you already know about the folder.

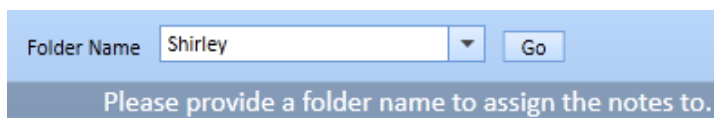
Quick Search

Locate a folder using the Quick Search! Type a portion of the folder name, or if you don't know the folder name, type a portion of the Property Address or Buyer/Seller Names.



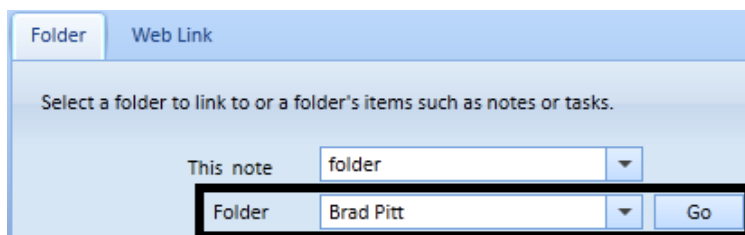
Home – Assign to Notepad or Inbox

Type Buyer or Seller name, Folder Name or a portion of the Property Address and click "Go" to locate the folder. You may also click on the pull down next to the folder name for a listing of the most recently viewed folders.



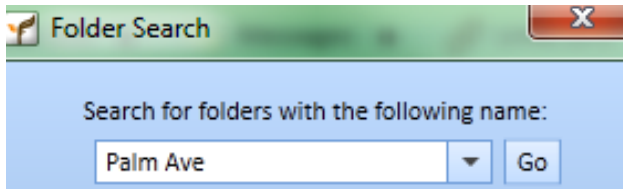
Link – Notes, Attachments, Tasks

Right mouse click on the Note that you would like to link to another object and select "Link". In the Folder field, type either the name of the folder to which you would like to link, the Buyer or Seller name or a portion of the Property Address and then click "Go" to locate the folder. You may also click on the pull down next to the folder name for a listing of the most recently viewed folders.



Attachments – Move To, Copy To

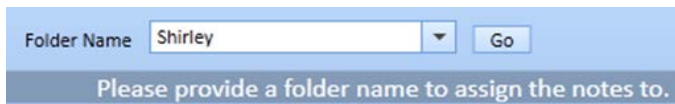
Right mouse click on the attachment you would like to move to or copy to another folder. Then type either the Buyer or Seller name, Folder Name or a portion of the Property Address. Click Go to locate the folder. You may also click on the pull down next to the folder name for a listing of the most recently viewed folders.



Drop Box – Adding Attachments

Using the GreenFolders Drop Box, you can add any document to a folder. Click File, Save As and then choose GreenFolders Drop Box. When the pop up displays asking for Inbox or Folder, select "Folder".

To find the folder needed, type either the Buyer or Seller name, Folder Name or a portion of the Property Address and click "Go" to locate the folder. You may also click on the pull down next to the folder name for a listing of the most recently viewed folders.



Note: When searching, all options selected by your GreenFolders Administrator are queried. For example; if you type 1414, you may retrieve folders for 14-1414 but also receive folders in your list for 1414 Main Street. If you type Hill, looking for Suzi Hill, you may retrieve folders for Hilltop, Hillside, Sam Hill etc.

If you found this Leaf of Knowledge helpful, you may also enjoy LOK #6: GreenFolders Inbox, LOK #7: Notes and LOK #21: Linking, LOK #23: Moving Attachments and Pages, LOK #27: Using Recent Folders

For more information regarding this Leaf of Knowledge, please contact a member of the GreenFolders Support Team at 801-747-2132 or GFSupport@GreenFolders.com.
