

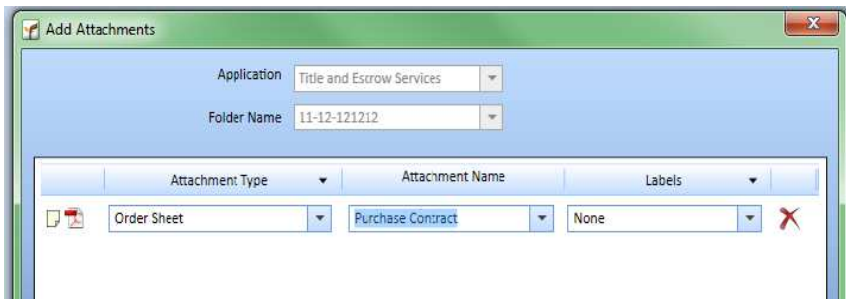
Adding Documents to a Folder

Drag and Drop, Print, Browse, Publish...Options, Options, Options!

Every day we get multiple documents that come to us in many ways. As we think of the different mediums in which these documents are delivered, it is always nice to have options available that will help us quickly and efficiently deposit the documents in the folders in which they belong. GreenFolders offers multiple options to help accomplish that goal.

Drag and Drop

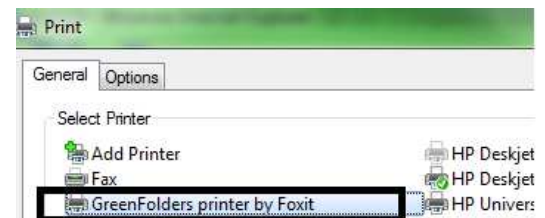
To drag an attachment to a folder, simply click on the attachment you would like to add to the folder, hold down the left mouse button and drag the mouse until the mouse pointer is over the Attachments Pane and release the mouse button. (If you use the Microsoft Outlook client, you may drag an email, including any email attachments, to the folder) To drag multiple documents or emails to a folder, hold the Ctrl key while clicking on your selections.



Once the attachment has been dropped, the Add Attachments window will open and allow you to index the attachment by choosing an Attachment Type, Attachment Name, Label and Parties. Click OK to add the attachment to the folder under the selected Attachment Type. (Each company has their own configuration so the Label and/or Parties feature may or may not be present)

Printing (Using a PDF Creator)

To print an attachment to GreenFolders select; the GreenFolders Printer by Foxit, BullZip or PDFCreator from the printer selection window. This will give you the option to save the attachment directly to a folder OR to your GreenFolders Inbox, located on your Home Screen. Once the document has been printed, index it using the Add Attachment window as described above or Click Inbox, adding the document to the Home Screen Inbox tab. (You can assign the document from the Inbox to a folder at a later time.)



Browse

You may also add documents that are located on your computer or shared network drive to the folder. To use this option, click on the + located next to the Attachments tab. Select My Computer, the Inbox (located on your Home Screen) or Scanner.

My Computer - select documents to add to the file/folder from various locations on your network.

Inbox - see documents listed in the Inbox on your Home screen, and move them to the folder you are presently working in.

Scanner - scan from a locally connected scanner directly to the folder you are presently working in.



Publish

If your company uses StreamLine™ for your Production System, you may add a document directly to GreenFolders by clicking on the Publish button. After clicking Publish, the window to index the document(s) is displayed.

SoftPro Select users can also publish attachments directly to the file/folder. Click on the documents tab and choose a document from the left panel to add. Highlight the document from the right panel and click Publish at the bottom of the screen. The Add Attachments window will be displayed to index the document.



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.
