




Managing Cabinets


Think of cabinets in PinPoint just as you do cabinets in your office. Cabinets help you separate your documents at the highest level into subject matter. Each cabinet will have its own set of folders and sub-dividers to help you organize documents efficiently.














































From the menu, click Admin, then click Cabinets under the Fileroom Management column, or click the Cabinets button below the admin menu.


Cabinet Name  Search Cabinets

Search 

Clear 

Add Cabinet 

Actions	Cabinet Name 	Lockdown	Edit Disabled	CM Auto Folder	Default Sub-Divider	Default Doc Type	Onboard	Updated By
   	Clients	No	No	Yes		Client Invoice	New Clients	Drew Johnson
   	Departments	No	No	No				Patrick C
   	Employees	No	No	Yes	Application	Employee Application	Employee Application	Drew Johnson
   	KnowledgeBase	No	No	No				Drew Johnson
   	Municipal	No	No	No				Test User
   	Patients	No	No	No			New Patient Files	Test User
   	Projects	No	No	No				Patrick C
   	Properties	No	No	No	Offers			Test User
   	QA Files	No	No	No				Patrick C
   	Students	No	No	No		Student Application	Student Application Process	Drew Johnson
   	Vendors	No	No	No				Test User

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Add Cabinet

1. To begin, click the Add Cabinet button located at the top of the page and a pop-up window will appear.

Cabinet

* Cabinet Name Clients

Automatic Onboard New Clients

Last User: Drew Johnson

Default Doc Type Client Invoice

☐ Lockdown

Date Added: 09/17/2015

Description

☐ Disable Cabinet Edit

Date Edited: 06/05/2023

Notes

☒ Automatic CM Folder

Add Folder Field: A 📁 📄 📝 🔍 🗑️

Save

Clear

* Field Name	Folder Title	Required	Visible	Size	Unique	Field Type	Mask	Tool Tip	Actions
Matter Number	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	50	<input type="checkbox"/>	Text			🗑️
Company Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	50	<input checked="" type="checkbox"/>	Text			🗑️
First Name	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	50	<input type="checkbox"/>	Text			🗑️
Last Name	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	50	<input type="checkbox"/>	Text			🗑️
Address 1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	50	<input type="checkbox"/>	Text			🗑️
Address 2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	50	<input type="checkbox"/>	Text			🗑️
City	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	50	<input type="checkbox"/>	Text			🗑️
State	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	DropDown	States		🗑️
Zip Code	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	50	<input type="checkbox"/>	Numeric			🗑️
Currency	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	25	<input type="checkbox"/>	Text			🗑️
Active	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	CheckBox			🗑️

1. Enter the Cabinet Name.
2. Using the icon buttons above Field Name, select the folder field types you would like to add.
You are required to add at least one folder field for the cabinet.
3. Check the boxes Folder Title and Required for the folder field you want displayed in searches.
Only one folder field can be set as the Folder Title.
4. If needed...
 - You can change the character limit for each folder field using the Size. The maximum characters you can set per field is 99.
 - You can make a folder field unique by checking Unique.
 - You can adjust the folder field format using the Mask button.
 - You can enter a Tool Tip for the folder field, which will be visible when users place their mouse over the folder field when creating a new folder in the cabinet.
5. When you are finished adding folder fields, click Save.
6. After saving your new cabinet, a "Default" Sub-Divider will be automatically added for you.
Each cabinet must have at least one sub-divider.
 - Sub-dividers are used to "divide" different document types within the folders in the cabinet. If you would like to keep the "Default" sub-divider, you do not need to do anything more for the cabinet. If you would like to add more sub-dividers, click the Sub-Divider button under the Actions column.

Cabinet Name Employees

Search


Clear


Add Cabinet


Actions	Cabinet Name	Lockdown	Edit Disabled	CM Auto Folder	Default Sub-Divider	Default Doc Type	Onboard	Updated By
<div style="display: flex; justify-content: space-around; align-items: center;"> 👤 📁 📄 🗑️ </div>	Employees	No	No	No	Default			Patrick C


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












































Cabinet Security


Cabinet Name  Search Cabinets

Search 

Clear 

Add Cabinet 

Actions	Cabinet Name 	Lockdown	Edit Disabled	CM Auto Folder	Default Sub-Divider	Default Doc Type	Onboard	Updated By
   	Clients	No	No	Yes		Client Invoice	New Clients	Drew Johnson
   	Departments	No	No	No				Patrick C
   	Employees	No	No	Yes	Application	Employee Application	Employee Application	Drew Johnson
   	KnowledgeBase	No	No	No				Drew Johnson
   	Municipal	No	No	No				Test User
   	Patients	No	No	No			New Patient Files	Test User
   	Projects	No	No	No				Patrick C
   	Properties	No	No	No	Offers			Test User
   	QA Files	No	No	No				Patrick C
   	Students	No	No	No		Student Application	Student Application Process	Drew Johnson
   	Vendors	No	No	No				Test User

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1. Under the Actions column, click the Security button next to the cabinet you want to set security for.
2. In the pop-up window, select the Group/Users you want to give access to the cabinet.
3. Close the window when finished.

Edit Cabinet













































Cabinet Name ⓘ

Search Cabinets

Search 🔍

Clear 🗑️


















































Add Cabinet ➕

Actions	Cabinet Name ⌵	Lockdown	Edit Disabled	CM Auto Folder	Default Sub-Divider	Default Doc Type	Onboard	Updated By
   	Clients	No	No	Yes		Client Invoice	New Clients	Drew Johnson
   	Departments	No	No	No				Patrick C
   	Employees	No	No	Yes	Application	Employee Application	Employee Application	Drew Johnson
   	KnowlledgeBase	No	No	No				Drew Johnson
   	Municipal	No	No	No				Test User
   	Patients	No	No	No			New Patient Files	Test User
   	Projects	No	No	No				Patrick C
   	Properties	No	No	No	Offers			Test User
   	QA Files	No	No	No				Patrick C
   	Students	No	No	No		Student Application	Student Application Process	Drew Johnson
   	Vendors	No	No	No				Test User

25 ▾

1. Click the Cabinet Name to edit a cabinet.
2. A pop-up window will appear with the cabinet settings. If you are logged in as the main admin account, you can also re-order folder fields any time by clicking the arrows below the Actions column.
3. After making your changes to the cabinet, click the Save button.







































Delete Cabinet

Cabinet Name  Search Cabinets		Search  Clear 		Add Cabinet 					
Actions	Cabinet Name 	Lockdown	Edit Disabled	CM Auto Folder	Default Sub-Divider	Default Doc Type	Onboard	Updated By	
   	Clients	No	No	Yes		Client Invoice	New Clients	Drew Johnson	
   	Departments	No	No	No				Patrick C	
   	Employees	No	No	Yes	Application	Employee Application	Employee Application	Drew Johnson	
   	KnowledgeBase	No	No	No				Drew Johnson	
   	Municipal	No	No	No				Test User	
   	Patients	No	No	No			New Patient Files	Test User	
   	Projects	No	No	No				Patrick C	
   	Properties	No	No	No	Offers			Test User	
   	QA Files	No	No	No				Patrick C	
   	Students	No	No	No		Student Application	Student Application Process	Drew Johnson	
   	Vendors	No	No	No				Test User	

Please note, you can only delete a cabinet if it is empty and there are no recoverable documents for the cabinet.

1. Under the Actions column, click the Delete button next to the cabinet you want to delete.
2. a confirmation message will then appear. Click Yes to confirm.

















Copy Cabinet

Cabinet Name  Search Cabinets		Search  Clear 		Add Cabinet 					
Actions	Cabinet Name 	Lockdown	Edit Disabled	CM Auto Folder	Default Sub-Divider	Default Doc Type	Onboard	Updated By	
  	Clients	No	No	Yes		Client Invoice	New Clients	Drew Johnson	
  	Departments	No	No	No				Patrick C	
  	Employees	No	No	Yes	Application	Employee Application	Employee Application	Drew Johnson	
  	KnowledgeBase	No	No	No				Drew Johnson	
  	Municipal	No	No	No				Test User	
  	Patients	No	No	No			New Patient Files	Test User	
  	Projects	No	No	No				Patrick C	
  	Properties	No	No	No	Offers			Test User	
  	QA Files	No	No	No				Patrick C	
  	Students	No	No	No		Student Application	Student Application Process	Drew Johnson	
  	Vendors	No	No	No				Test User	

Copying a cabinet will copy the existing cabinet's Folder Fields, Sub-Dividers, and Security. Changes can be made to the new cabinet once it has been added.

1. Under the Actions column, click the Copy button next to the cabinet you want to copy.
2. Enter the Cabinet Name.
3. Click the Save button.

CM Link

Cabinet Name  Search Cabinets		Search  Clear 		Add Cabinet 					
Actions	Cabinet Name 	Lockdown	Edit Disabled	CM Auto Folder	Default Sub-Divider	Default Doc Type	Onboard	Updated By	
	Clients	No	No	Yes		Client Invoice	New Clients	Drew Johnson	
	Departments	No	No	No				Patrick C	
	Employees	No	No	Yes	Application	Employee Application	Employee Application	Drew Johnson	
	KnowledgeBase	No	No	No				Drew Johnson	
	Municipal	No	No	No				Test User	
	Patients	No	No	No			New Patient Files	Test User	
	Projects	No	No	No				Patrick C	
	Properties	No	No	No	Offers			Test User	
	QA Files	No	No	No				Patrick C	
	Students	No	No	No		Student Application	Student Application Process	Drew Johnson	
	Vendors	No	No	No				Test User	

If you would like to link an Account to an existing cabinet, please follow the steps below:

1. Under the Actions column, click the CM Link button next to the cabinet you want to link an Account to.
2. Select the Account (and Contact If needed).
3. Click the Add button.