
























































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.

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
    	Propertiles	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 Default Doc Type: Client Invoice Description: Notes:

Automatic Onboard: New Clients Lockdown: Disable Cabinet Edit: Automatic CM Folder:

Last User: Drew Johnson Date Added: 09/17/2015 Date Edited: 06/05/2023

Add Folder Field: 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...
 - o You can change the character limit for each folder field using the Size. The maximum characters you can set per field is 99.
 - o You can make a folder field unique by checking Unique.
 - o You can adjust the folder field format using the Mask button.
 - o 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.
 - o 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
	Employees	No	No	No	Default			Patrick C

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Cabinet Security

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

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

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

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

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

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.