












Managing Sub-Dividers

Sub-Dividers are used to “divide” the documents you have within a folder. Only one sub-divider is required for each cabinet.

Add Sub-Divider

1. From the menu, click Admin, then click Cabinets under the Fileroom Management column, or click the Cabinets button below the admin menu.
2. Under the Actions column, click the Sub-Dividers button next to the 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

3. Enter the Sub-Divider Name.
 - If you want to assign the sub-divider to one folder exclusively, select the Folder you want to assign the sub-divider to.
4. Click the Save button when finished
 - If you want to assign the sub-divider as the Default for the cabinet, click Set as Default.

Sub-Divider ✖

* Sub-Divider ? New Sub-Divider
Folder ? <-- Select folder --> ▾ Search Folder 🔍

Save
Clear

Sub-Divider ? Search Sub-Divider
Search 🔍
Clear ↺

Sub-Divider	Default	Exclusive	Folder	Delete
Application	Set as default	No		
Chargebacks	Set as default	No		
Contracts	Set as default	No		
Correspondence	Set as default	No		
Disputes	Set as default	No		
External Docs	Set as default	No		
Internal Docs	Set as default	No		
Invoices	Set as default	No		
Notes	Set as default	No		

Edit Sub-Divider










1. Click the Sub-Divider Name, then edit the Sub-Divider as needed.
2. Click the Save button when finished.

Sub-Divider ✕

* Sub-Divider ? Application Folder ? <-- Select folder --> Search Folder 🔍

Save **Clear**

Sub-Divider ? Search Sub-Divider **Search** 🔍 **Clear** 🔄

Sub-Divider	Default	Exclusive	Folder	Delete
Application	Set as default	No		
Chargebacks	Set as default	No		
Contracts	Set as default	No		
Correspondence	Set as default	No		
Disputes	Set as default	No		
External Docs	Set as default	No		
Internal Docs	Set as default	No		
Invoices	Set as default	No		
Notes	Set as default	No		

Delete Sub-Divider

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

1. Click the Delete button next to the sub-divider.



* Sub-Divider ?

Folder ?

<-- Select folder -->

Search Folder



Save








Clear

Sub-Divider ?

Search Sub-Divider

Search

Clear

Sub-Divider	Default	Exclusive	Folder	Delete
Application	Set as default	No		
Chargebacks	Set as default	No		
Contracts	Set as default	No		
Correspondence	Set as default	No		
Disputes	Set as default	No		
External Docs	Set as default	No		
Internal Docs	Set as default	No		
Invoices	Set as default	No		
Notes	Set as default	No		