Managing Sub-Dividers

Sub-Dividers are used to "divide" the documents you have within a folder. <u>Only one sub-divider is required for each cabinet.</u>

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.

Edit Sub-Divider

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

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

* Sub-Divider ❓		
Save Clear		
Sub-Divider ❓ Search Sub-Divider	Search 🔍 Clear ⟳	

Folder ❓ <-- Select folder --> ⬍ Search Folder 🔍

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		🗑