

Make Note of It!

When multiple people view a folder, the best way to keep everyone informed is by placing a note in the file that is visible to everyone with the security privileges to do so.

Add GreenFolders notes in general the notes of the file, on a specific attachment and on each individual task. A personal notepad is also available on your home screen for your view only! On each note, you can identify who made the note and who may have modified the note.

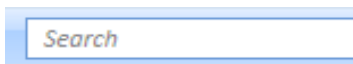
General Folder Notes

Found within the folder, the Notes section provides a general area for everyone to place notes pertaining to that specific file. Making notes is easy and provides some handy tools such as:

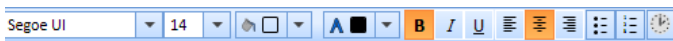
1. Include your user name and date/time stamp in your note by clicking on the clock on the toolbar.



2. Search for a specific word in a note or a name of a user who added the note by using the "Search" option.



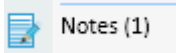
3. Make your notes STAND OUT by using the Rich Text tools. Type the note first, highlight what is important by using the highlight tool, resize the text, use bold, italicize or underline. They will not miss it now!



Edited by Administrator on xx/xx/20xx 1:34:16 PM

this is an **important note**

Attachment Notes



Apply a note right next to the attachment name. This will help identify that an internal note pertaining to that specific document is available. All of the same great features listed above are included in this type of note too! To make a note relating to a document, right mouse click on the document and select "Notes"

Task Notes

Another place where notes become extremely helpful is on each individual task. Keep details of the task at hand; help provide information for historical purposes and for when a question needs to be answered in the file if you are unavailable.

Tip: The history of your file is important, not only today, but for questions pertaining to the file in the future. Be prepared and do more than make a mental note, take note!

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.
