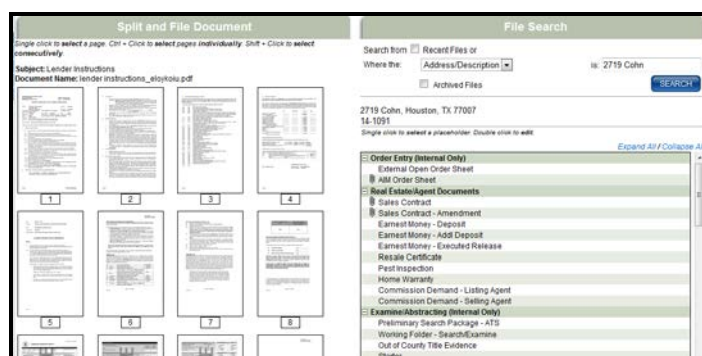


Split and File a Document

PDF documents attached to messages can be split and filed to an empty placeholder that already exists on the file, or to a new placeholder.

Steps

1. On the navigation pane, click **Messages**.
2. Find and select the message and then from the menu bar, select **Split**. A new page displays with two columns; the document pages display in the left column and the file search and placeholders display in the right.



Note: File Search defaults to the **Current File** listed at the top of the screen. If no file has been opened, then no **Current File** will be listed.

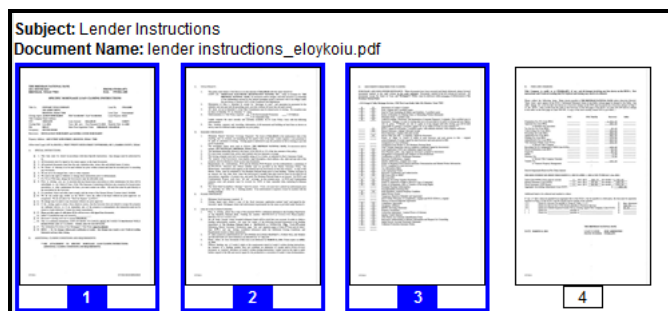
3. Under File Search, by default, if no Current File is listed at the top of the screen, the file you last searched for displays. Search for the file by the file number, property address or description.
 - **Search from**—Select this checkbox to search for files from the Recent Files list. Once selected, only files from within the Recent Files list display.
 - **Where the:**—Select the option that best describes how you want to search for the file: by the **file number** or **property address**.
 - **is:**—Type all or part of the file number or property address of the file you want to search for.
 - **Archived Files**—Select to search archived files.
4. With the criteria entered, click **Search**.

Note: The search results include both the file number and property address for easier identification.

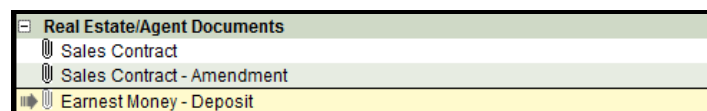
5. From the file list, select the appropriate file. Available folders and placeholders display.
 - To expand or collapse the list of placeholders under a folder, click the + or - sign to the right of each folder.

- To expand or collapse all folders and placeholders at once, click **Expand All/Collapse All** at the top of the placeholder list.

6. From the document list, select the page or pages you want to transfer. Selected pages are highlighted in blue.



7. Single-click on the placeholder to transfer the message. Notice the placeholder is highlighted and a paperclip icon indicates the document is attached. If needed, click the paperclip icon to display the document.



- You can create a new placeholder by clicking a folder or an occupied placeholder; this adds a new placeholder directly below the selection with the same name as the message subject.

Note: To edit the name of a placeholder, double-click the placeholder to make your changes. A red asterisk (*) indicates a required field must be completed to continue.

8. By default, the **Record on Activity Log** option is selected. Accept the default if you want to record the transfer on the Activity Log.



9. If you want to delete the message upon filing, select the **Delete Original Message** check box.
10. When finished, click **Save**.

Note: If you selected **Delete Original Message**, a pop-up will display to continue or cancel the action. Click **OK** to delete the original message and all attached documents.