EASY ENVELOPES

For times when you need to work with a variety of records, an envelope is an easy way to gather them in one place. Here is how to create and fill one:

Right click the document name in the hitlist, or on the document itself to see the Send To option. From Send To, choose Envelope. (You can highlight multiple documents and send them to an envelope at one time.)

In the dialogue box that opens, click New, and enter the name for your envelope and click Add.

Find your envelope by choosing User From the first dropdown in the Navigation Panel

Choose Envelope from the next dropdown.

There is your envelope. Click it to open and see your documents.