

How to...
FOLDERS



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Organise Groups of Contacts in Folders and Subfolders for easier, quicker navigation.

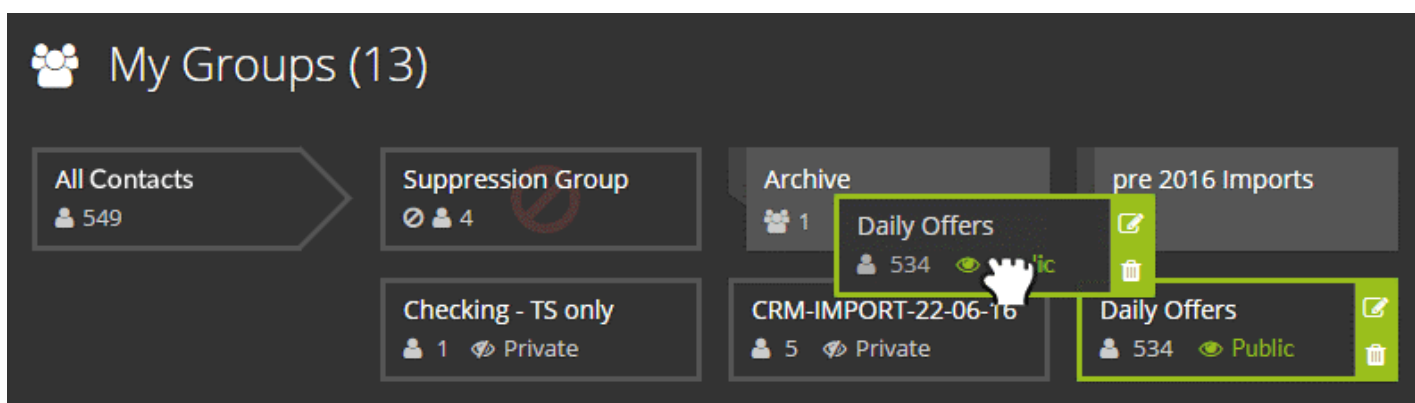
Create a Folder

1. On the Groups screen click the green 'Add Folder' button
2. Give your Folder a name and click 'Create'
3. The folder will now be visible on screen
4. You can repeat these steps if you click to open a Folder and want to add a Subfolder



Moving a Folder or a Group into a Folder

1. Drag and drop your chosen Folder or Group into your chosen Folder.
2. After you drop the Folder or Group you will see it disappear from your current location.



3. Click the Folder to open it. Your Folder or Group will be inside
4. You can repeat these steps if you have a Subfolders and you want to move a Folder or Group into one.

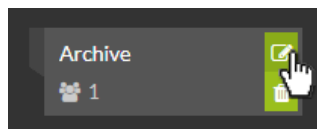
Moving a Folder or Group out of a Folder

1. Open the Folder that contains the Folder or Group you want to move.
2. Click and drag your chosen Folder or Group away from its current Folder and drop it into any other Folder or Subfolder in view.
3. If you don't want the Folder or Group to be in a Folder any more, simply drop it into 'All Contacts'.

4. Similarly, if you want the Folder or Group to appear in a Folder that is not in view, move it to 'All Contacts' first and then move it from there to the Folder of your choice.

Renaming a Folder

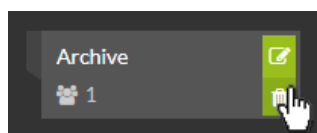
1. Hover over the Folder you wish to rename



2. Click the 'Edit' button top right of the Folder
3. The Folder Card will open and 'Name' will be available to edit
4. Changes will be auto-saved. Click the 'Close' button when all changes have been made.

Removing a Folder

1. Hover over the Folder you wish to remove



2. Click the 'Remove' button bottom-right of the Folder
3. A confirmation warning will open. Please read it and click the 'Confirm Remove' button or to cancel the removal click the 'Close' button.

Warning!

Removing a Folder also removes any Subfolders and/or Groups it contains.

Related Resources



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