

Did You Know - Silo Now Has Document Grouping!



Did you know...



Paperless that WORKS!

800-457-3733

MuniMetriX News & Technical Tips

... Silo offers a Document Grouping feature??

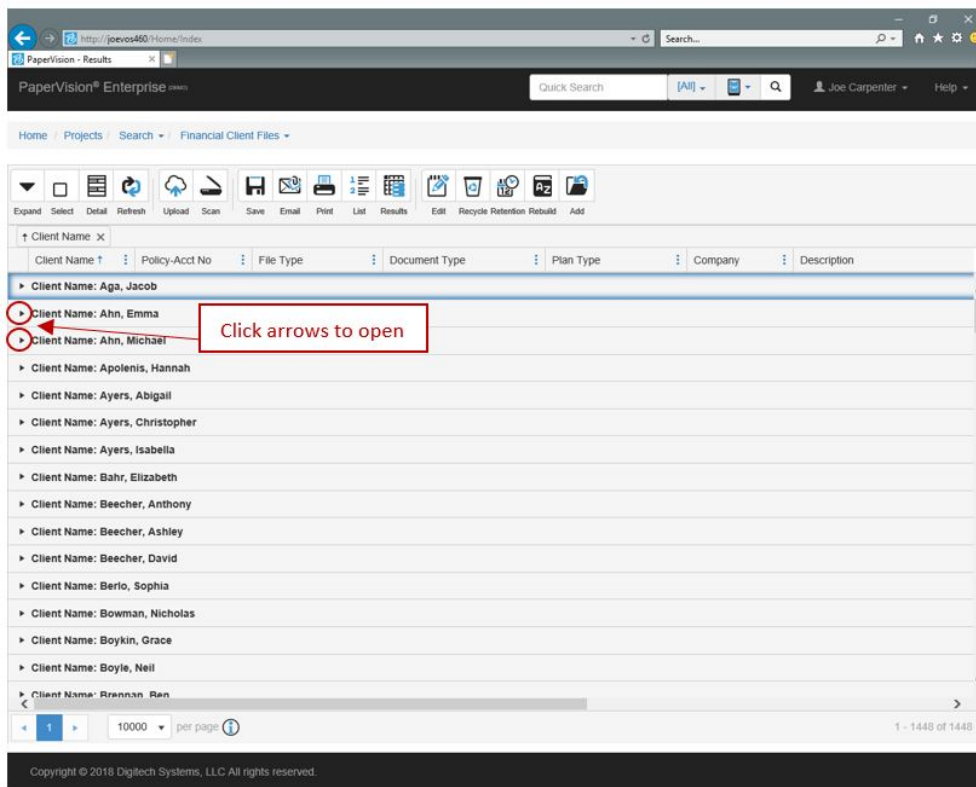
It's like using folders, only much easier!! You now have the ability to group documents together in the search screen by simply dragging and dropping a column header (i.e., Client Name) to the grouping field.

Drag and drop here to group by columns

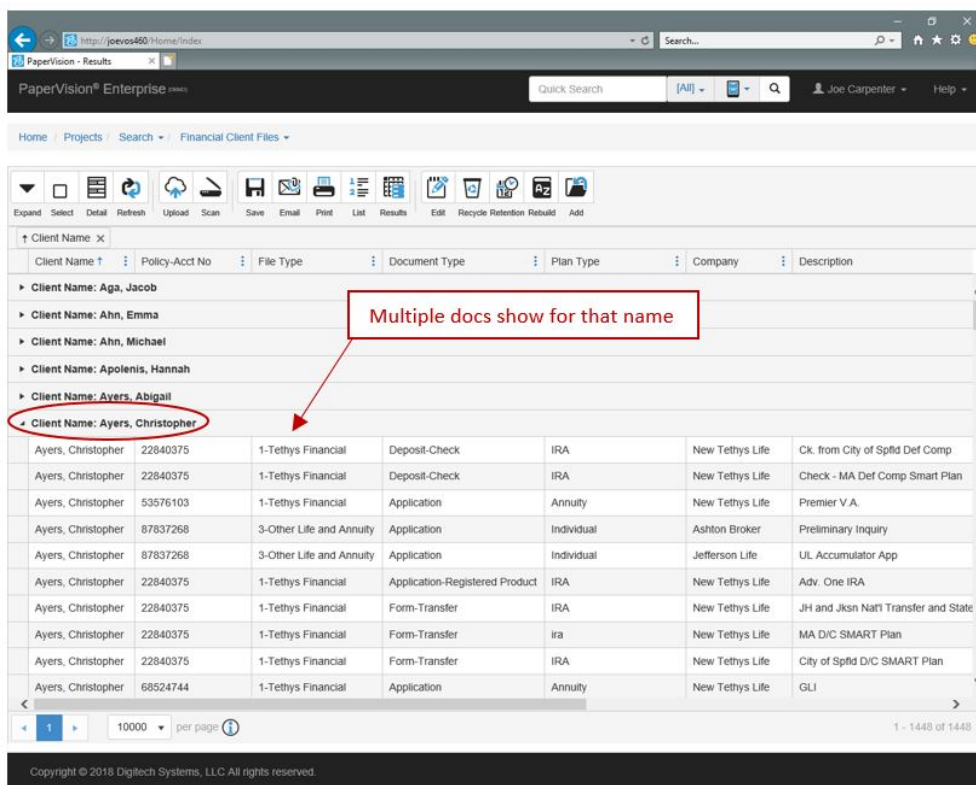
Drag/Drop column header to here

Client Name	Policy-Acct No	File Type	Docum	Description		
Aga, Ja	58208999	1-Tethys Financial	Form-Distribution	Universal Life	New Tethys Life	Partial Withdraw
Ahn, Emma	2142873321	1-Tethys Financial	Application	20 Year Term	New Tethys Life	\$2,500,000 Level Prem Convertible Term
Ahn, Emma	2142873321	1-Tethys Financial	Receipt for Check and Cash	20 Year Term	New Tethys Life	\$2,500,000 Level Prem Convertible Term
Ahn, Emma	2142873321	1-Tethys Financial	Other	20 Year Term	New Tethys Life	Medical Scheduled
Ahn, Michael	56073351	1-Tethys Financial	Other		New Tethys Life	Medical Scheduled
Ahn, Michael	56073351	1-Tethys Financial	Application	Survivorship Universal Life	New Tethys Life	\$5,000,000 Nautilus Adv Survivorship UL
Apolenis, Hannah	75167228	2-Falcon	Illustration	IRA	British Capital	LWP Crystal Proposal
Apolenis, Hannah	75167228	2-Falcon	Application-Registered Product	IRA	British Capital	LWP Crystal App
Apolenis, Hannah	75167228	2-Falcon	Application-Registered Product	IRA	British Capital	Source of Funds
Apolenis, Hannah	75167228	2-Falcon	Application-Registered Product	IRA	British Capital	AUM Cover Sheet
Apolenis, Hannah	75167228	2-Falcon	Statement	IRA	British Capital	Adv. One Statement
Apolenis, Hannah	75167228	2-Falcon	Form-Transfer	IRA	British Capital	Transfer Form for Adv. One MMA
Apolenis, Hannah	75167228	2-Falcon	Disclosure Form	IRA	British Capital	LWP Crystal Agreement
Apolenis, Hannah	75167228	2-Falcon	Correspondence	IRA	British Capital	ADV Ltr.
Ayers, Abigail	22842961	1-Tethys Financial	Application-Registered Product	IRA	New Tethys Life	IRA Transfer Form
Ayers, Abigail	22842961	1-Tethys Financial	Application-Registered Product	IRA	New Tethys Life	401(k) rollover confirmation

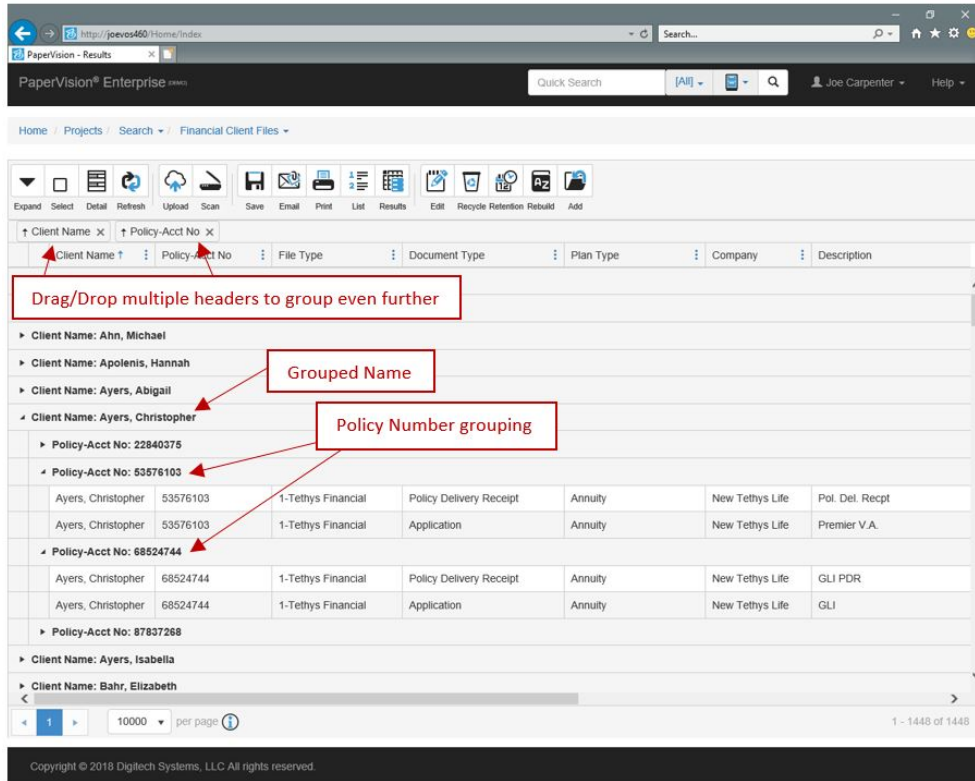
It groups documents in such a way that searching the name is now like searching their own "folder". Simply click the arrow next to the name to view all of their documents.



Once the arrow next to the name is clicked, only documents for that name will show in the subsection.



You can even drag/drop multiple headers to group (i.e., client name and policy number) for a more refined sort. Not only will it group by name, then it will group by policy number. No more manual folder creation is needed when using this feature.



NOTE: Search results only show 500 items at a time. If you do not see all documents listed under the Client Name when grouping, continue to the next page.

As always, you may call our support team at 800-457-3733 for assistance. We'll be happy to help!

We want to encourage you, as a valued customer, to reach out to us should you have any suggestions or ideas you feel would be a benefit in your use of Silo. Call us at 800-457-3733 or e-mail us at support@munimetrix.com any time! We appreciate your loyalty!
