

Keep a check's documents in Folio

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If your organisation uses Folio, a check's documents and its evidence pack can be kept there with the rest of your records, under the retention class you choose.

Before you start

Your organisation needs Folio too.

1

Keep one check

Go to **Loupe** > **Checks**

Open the check and press **Keep in Folio** in the **Folio** box.

2

Choose where it goes

Pick the **Folder** and the **Retention class**. For a single document, give it a **Name**. Then press **Keep in Folio**.

With several documents, each keeps its own name, and the evidence pack goes with them.

3

Or keep them automatically

Go to **Loupe** > **Settings**

Under **Keep in Folio automatically**, choose when:

- **When someone marks a document as altered**
- **Whatever someone decides**
- **Only when someone chooses to**

4

Pick the folder and class

Choose the **Folder in Folio** and the **Retention class** they're kept under, then press **Save**.

5

See where it went

Once kept, the **Folio** box on the check says which folder it's in. Press the folder to open it in Folio.

If something goes wrong

It says it couldn't keep the documents.

Press **Try again**, or choose another folder. If it still won't go, write to us at support@unforged.ai.