



Sending a Message Using AccutracXE and AccuRoute Desktop Quick Start Guide



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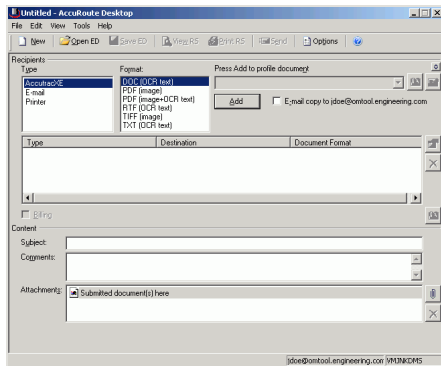
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Sending a message to Accutrac XE using AccuRoute Desktop

For detailed information on sending messages using AccuRoute Desktop, consult the user guide located at: <http://www.omtool.com/documentation/Accuroute/6.1/AccurouteDesktop/AccuRouteDesktopUserGuide.pdf>

To send a message to Accutrac® XE™ using AccuRoute Desktop:

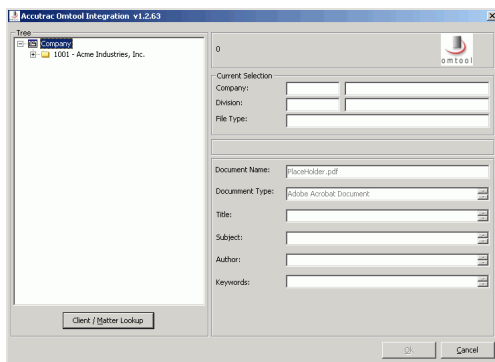
- 1 Start AccuRoute Desktop. Click **Start**, go to the Upland AccuRoute programs group, and select **AccuRoute Desktop**. Log in if prompted. The application appears on your desktop.



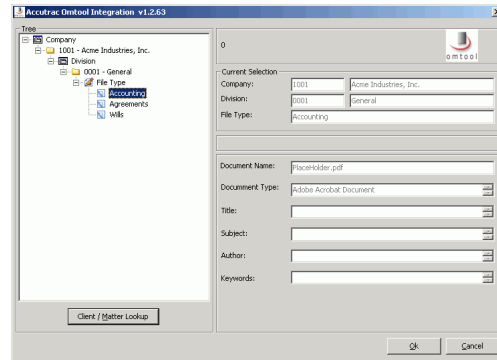
- 2 Select the destination type **AccutracXE** in the **Recipients Type** list and select a file format for your message in the **Format** list.

For more information on the available file formats, consult the [AccuRoute Desktop User Guide](#).

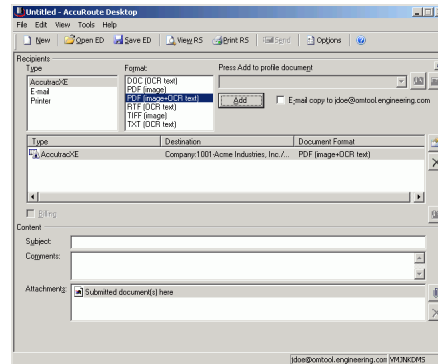
- 3 Click **Add**. The **Accutrac Upland Integration v6.1** screen appears.



- 4 Expand the Accutrac XE tree, select the appropriate location, and click **OK**. The **Current Selection** information is filled in.



- 5 Enter any optional information and click **OK**. An **OmtoolStub** destination appears in the message.



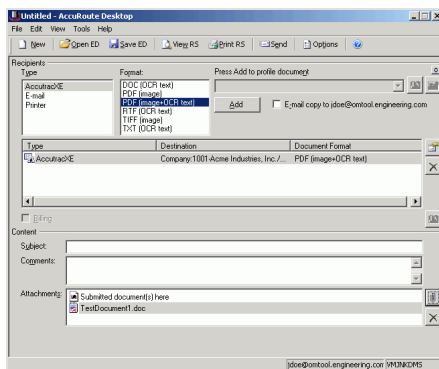
▶ When you create a Routing Sheet for Accutrac XE, AccuRoute creates a placeholder for the document. Never open, edit, or delete this placeholder.

- 6 Add content to your message.
- a Locate the **Content** section at the bottom and type a subject and comments.
- b Add any attachments you want to send with your message. Click the paperclip icon and do one of the following:

network administrator. (Your message can include both electronic and hard copy documents.)

File - Select this option to attach a file saved from your computer or network share. Go to the file, select it, and click **Open**. The file appears in the attachments list.

Web document - Select this option to attach a web page from the Internet. Type the address of the web document, choose a file name for the attachment, select a file format for this attachment (such as PDF or HTML), and click **OK**.



- 7 Do any of the following:

Send the message immediately - Click **Send** on the toolbar. A message box indicates that your message has been sent to the server. (Your message must have at least one attachment.)

Save the message as an Embedded Directive - Click **Save ED** on the toolbar, type a title for the Embedded Directive, and click **Save**.

Print a Routing Sheet that can be scanned with hard copy documents - Save the message as an Embedded Directive. Then click **Print RS** on the toolbar. AccuRoute Desktop creates a Routing Sheet containing the Embedded Directive and displays it as a PDF file on your desktop. Print the Routing Sheet and include it as the first or last page of the hard copy document. Take the document to a network scanner and scan it using the instructions provided by your