

Sending a Message Using CA MDY FileSurf and AccuRoute Desktop Quick Start Guide



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Sending a message to CA MDY FileSurf 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

I 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.

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2 Select the destination type **FileSurf** 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.



4 Click File to.



5 Enter the appropriate information and click **OK**. A FileSurf recipient type is added to the message.

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- 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:

File - Select this option to attach a file saved from your computer or network share. Browse 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,

Continued: Sending a message to CA MDY FileSurf using AccuRoute Desktop

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

2