



# **Sending a Message**

## **Using CA MDY FileSurf and**

## **AccuRoute Desktop**

### **Quick Start Guide**



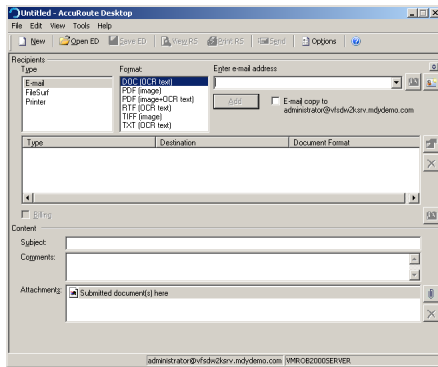
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# Sending a message to CA MDY FileSurf using AccuRoute Desktop

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>

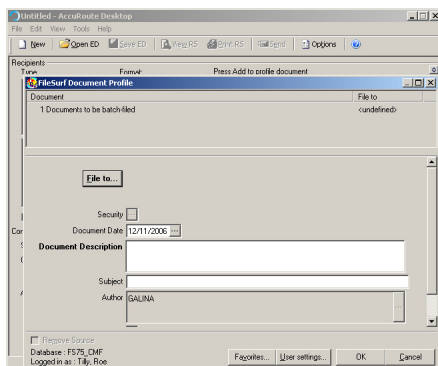
- 1 Start AccuRoute Desktop. Click **Start**, go to the Upland AccuRoute programs group, and select **AccuRoute Desktop**. Log in if prompted. The application appears on your desktop.



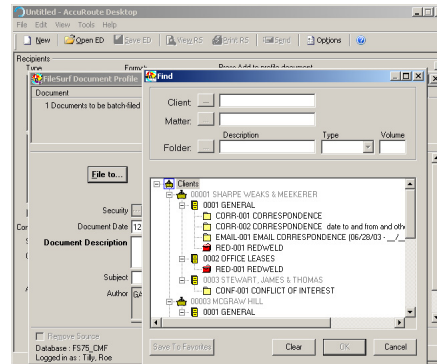
- 2 Select the destination type **FileSurf** in the **Recipients Type** list and select a file format for your message in the **Format** list.

For more information on the available file formats, consult the AccuRoute Desktop User Guide.

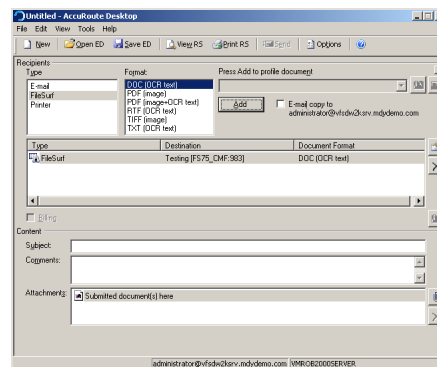
- 3 Click **Add**.



- 4 Click **File to**.



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



- 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,

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.)