Sending a Message

Using MyFolder and AccuRoute Desktop

Quick Start Guide

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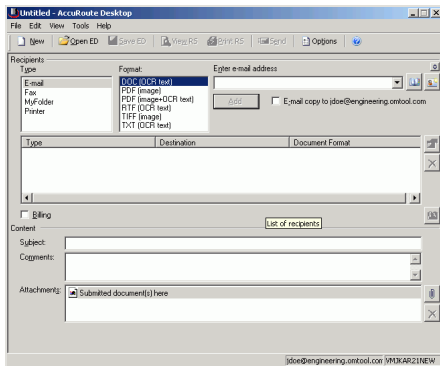
2 Select the destination type **MyFolder** in the **Recipients Type** list and select a file format for your message in the **Format** list.

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

   For information on using billing, consult the AccuRoute Desktop User Guide or your system administrator.
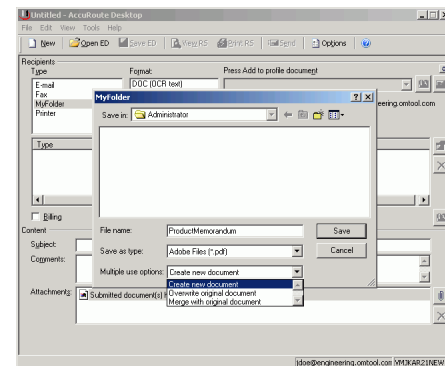
3 Click **Add**. The **MyFolder** screen appears.
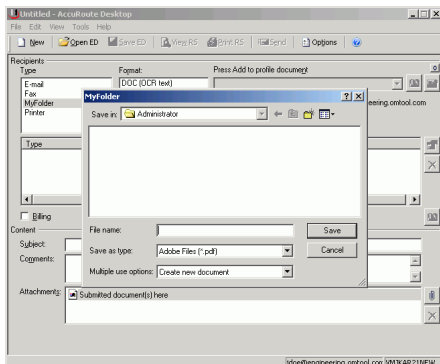
4 In the **File name** text box, enter the file name you wish to assign to your document.

   Note that the **Save as type** defaults to match the document format you selected in Step 2. Do not make any changes to this option.

5 From the **Multiple use options** drop-down list, select one of the following:

   Create new document. Selecting this option creates a new document in MyFolder. If you select this option and the file name already exists, the following message appears. Click **Yes** to replace the file or click **No** to return to the **MyFolder** screen.
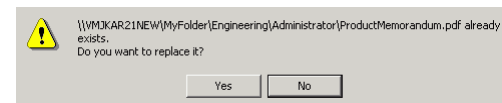
   Overwrite original document. If a document already exists with the file name you selected in Step 4, selecting this option overwrites the original file. Click **Yes** when the following message appears to replace the file or click **No** to return to the **MyFolder** screen.
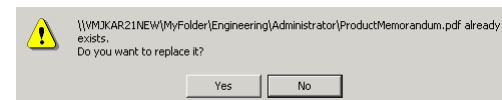
   Merge with original document. If a document already exists with the file name you selected in step 4, selecting this option merges any file attachments with

the original document. The resulting file is stored with the original file name.

Click **Yes** when the following message appears to merge the documents or click **No** to return to the **MyFolder** screen.

> ⚠ \\VMJKAR21NEW\MyFolder\Engineering\Administrator\ProductMemorandum.pdf already exists.
> Do you want to replace it?
>
> [Yes] [No]
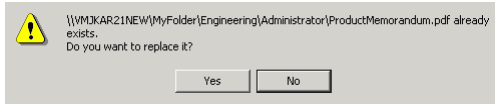
After the message is sent, any attachments on this message will be merged with the original document, resulting in one document stored in MyFolder.

Note that this option is only available when you select **PDF (image)** or **PDF (image+OCR text)** as your document format.

**6** Click **Save**. A MyFolder destination appears in the message.
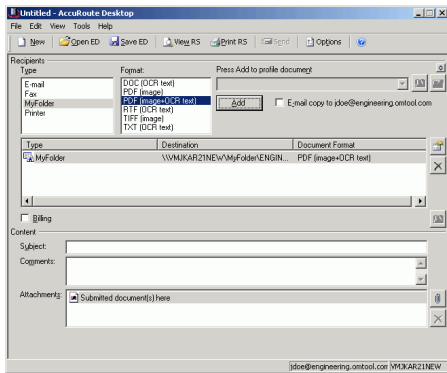
7 Add content to your message.

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. 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**.
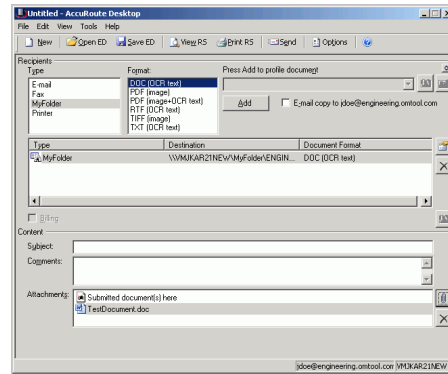
8 Do any of the following:

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.)