



# **Sending a Message Using WorkSite Enhanced and AccuRoute Desktop Quick Start Guide**



Upland AccuRoute  
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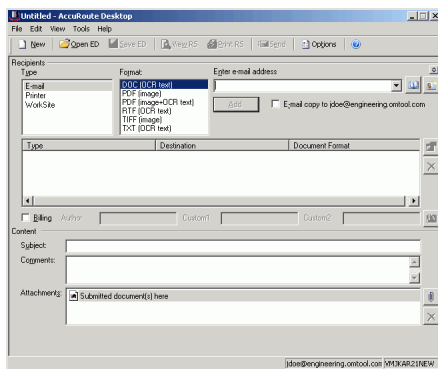
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# Sending a message to WorkSite using AccuRoute Desktop and the Enhanced Profile Dialog

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 WorkSite™ using AccuRoute Desktop:

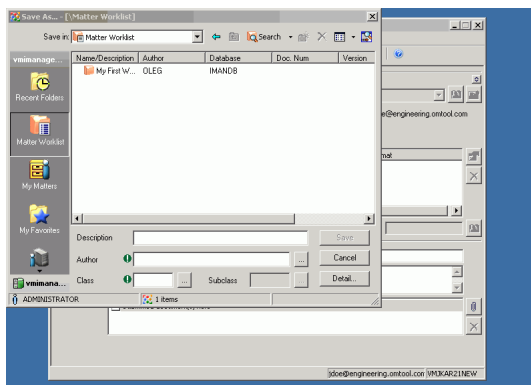
- 1 Start AccuRoute Desktop. Click **Start**, go to the Upland AccuRoute programs group, and select **AccuRoute Desktop**. Log in if prompted. The application appears on your desktop.



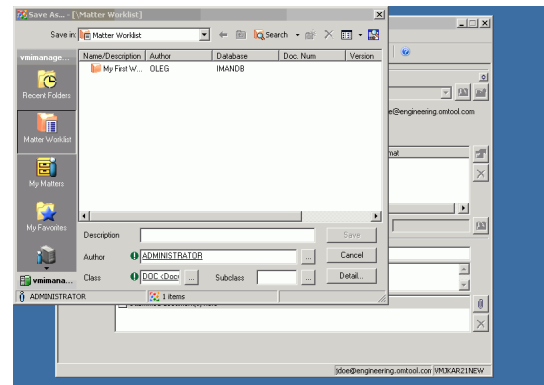
- 2 Select the destination type **WorkSite** in the **Recipients Type** list and select a file format for your message in the **Format** list.

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

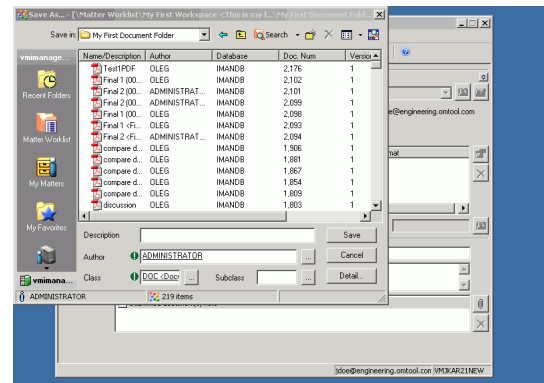
- 3 Click **Add**. The **Save As [Matter Worklist]** screen appears.



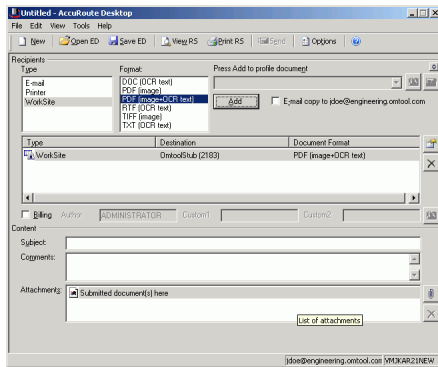
- 4 Enter **Author** and **Class** (required fields).



- 5 Double-click the worklist and subsequent folders until you reach the location of interest for your document and then click **Save**.



- 6 Complete any optional information if desired and click **Save**. An OmtoolStub destination appears in the message.

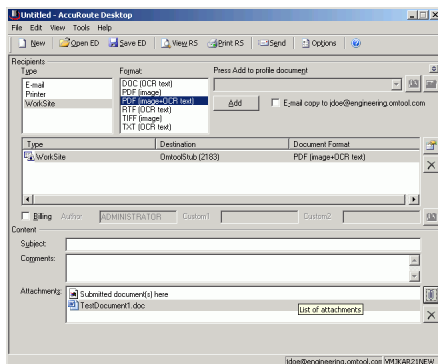


For information on using billing, consult the AccuRoute Desktop User Guide or your system administrator.

- 7 Add content to your message.
- Locate the **Content** section at the bottom and type a subject and comments.
  - 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.)