

## Acclipse Document Manager — Access Merged Client Document


To access a document you have merged with client details:

1. Click **Contacts** on the *Acclipse Document Management* toolbar — The *Contacts* window opens with a list of clients.

*NOTE: Depending on your client database the list could be organised according to client name, client ID, IRD number, TFN number, ABN number, or phone number.*

2. Locate the client using EITHER of these methods:

- Enter the first few characters of the client name, phone number, or alternative ID.
- Scroll down to the appropriate section.

*TIP: Click the retract  icon to minimise any unwanted sections.*

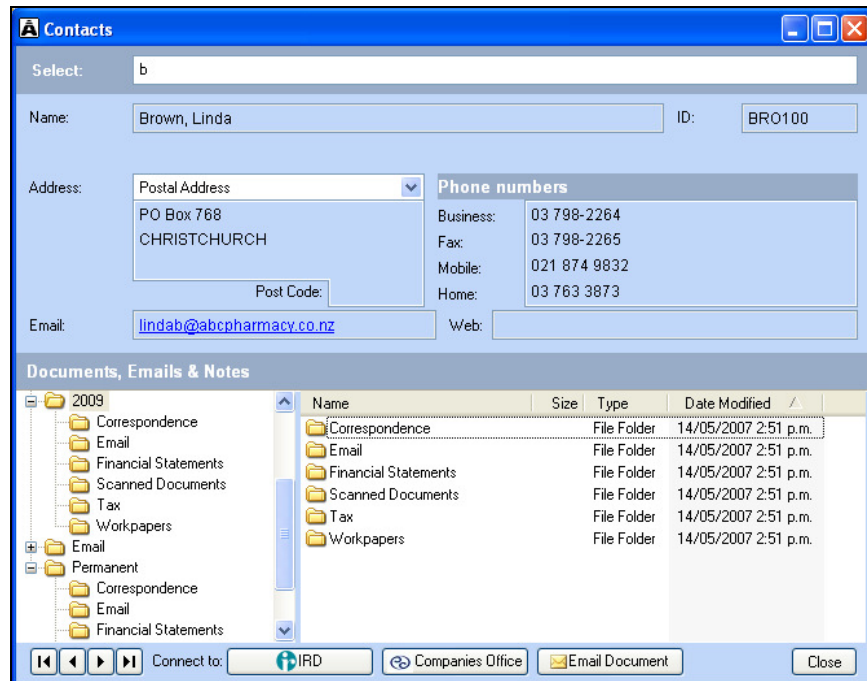
3. Double-click the client name or press **Enter**.
4. Click **Documents** on the folder tree → Select the appropriate subfolder.
5. View the document using EITHER of these methods:

- Double-click it.
- Right-click it → Select **Open**.

*NOTE: When you open a client profile, the Documents folder opens to the folder you last accessed.*

*NOTE: The Email subfolder under Documents contains shortcuts to emails related to the client. The actual emails are stored in the Emails folder at the highest level above Documents.*

*NOTE: If no merged documents or folders have been created for the selected client, your Desktop folder structure will display.*



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