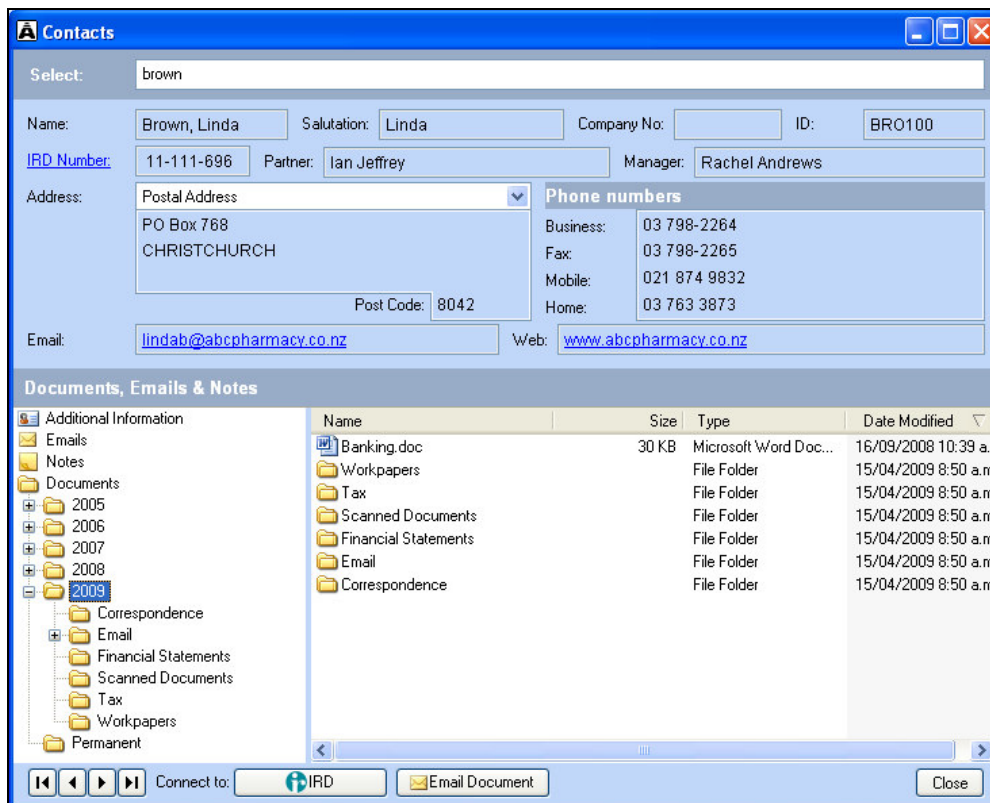


Acclipse Document Manager — Integrating Outlook Contacts

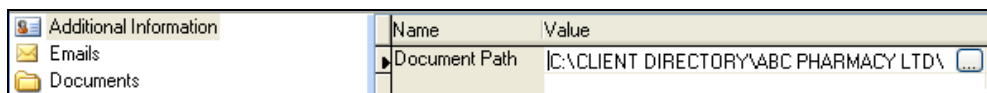
Integrating Acclipse Document Manager with Outlook enables you to:

- Use the *Contacts* window to store read-only contact details for your clients, prospects and suppliers.



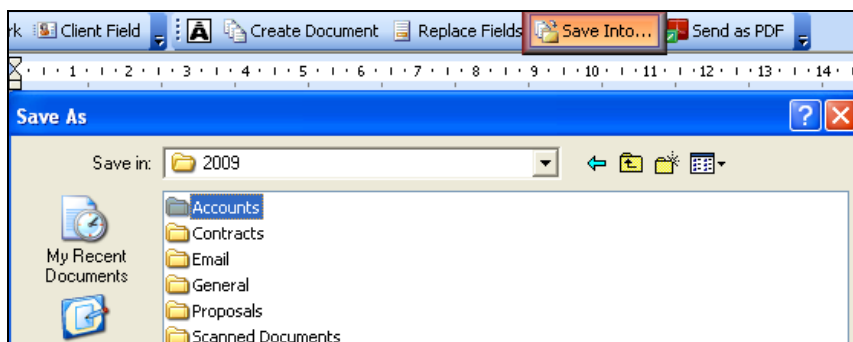
Acclipse Document Manager *Contacts* window

- Set a default document path to store all documents relating to a particular contact in one place.



Setting the default document path

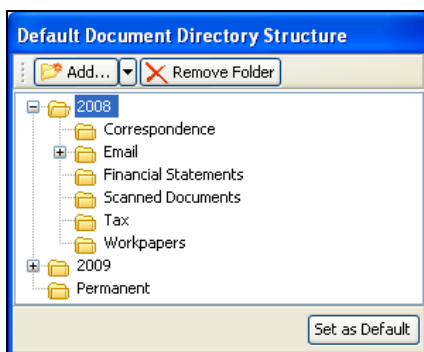
- Create documents for contacts by merging their details with your standard documents (eg seminar invitation or debt collection letters).
- Use the *Save Into* button in Word and Excel to save documents directly into the contact's folder.



Saving a document into a contact's folder

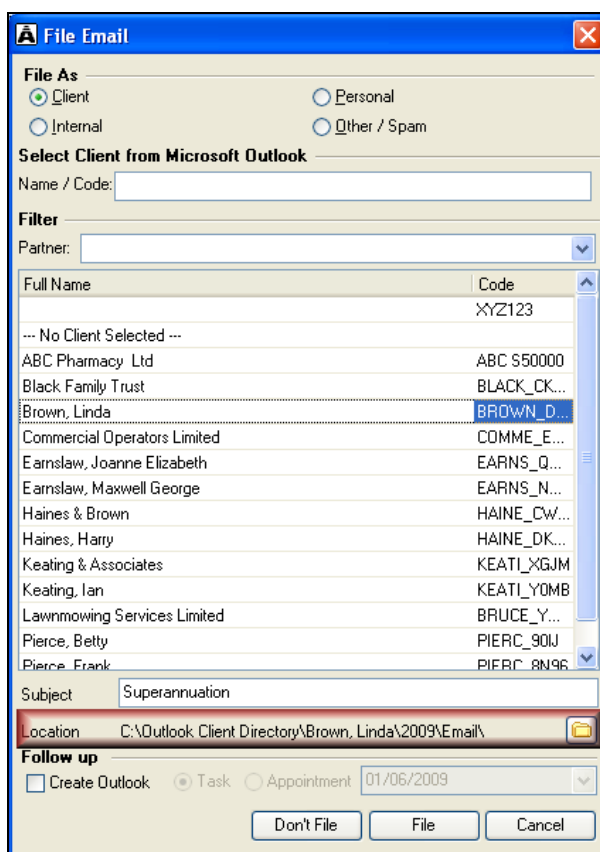
- Access the document directory for a contact from the *Contacts* window.

- Specify a default document directory structure for all contacts that will automatically be added when you use the *Save Into* button or file an email. This is useful if you want to set up your contact folders according to year and then work type.



Example of default document directory structure

- Automatically save a shortcut to each contact's email in their document directory (in a specified subfolder).



Seeing where your email will be filed

Integration considerations

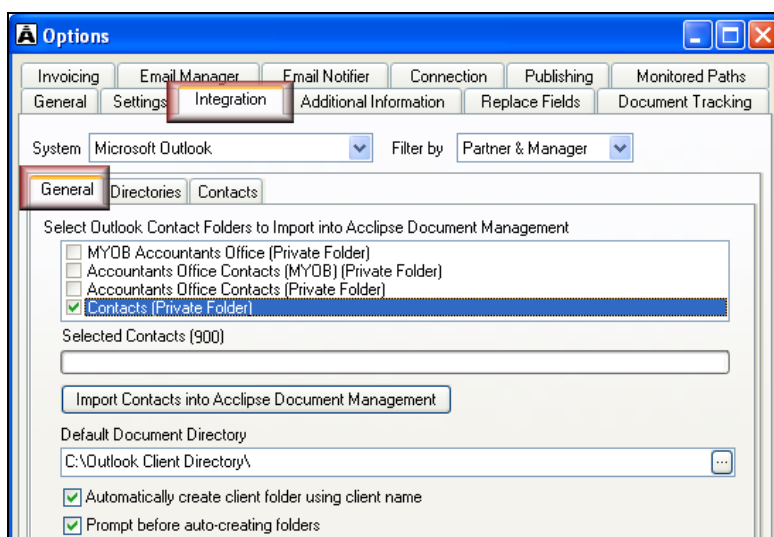
You should consider the following factors when integrating Acclipse Document Manager with Outlook:

- Where are your contacts' details currently stored?
- Do you want to filter your contacts according to partner or manager?
- Do you currently store your contacts' documents on your network?

Location of contact storage details

If you use a CRM system (eg GoldMine, Maximiser, or a customised Access database) you will need to import this contact information into an Outlook Contacts folder (either a personal address book, or, if you have Microsoft Exchange Server, a public or shared address book). Acclipse recommends you establish a quick, easy import process that you can run regularly (daily or weekly).

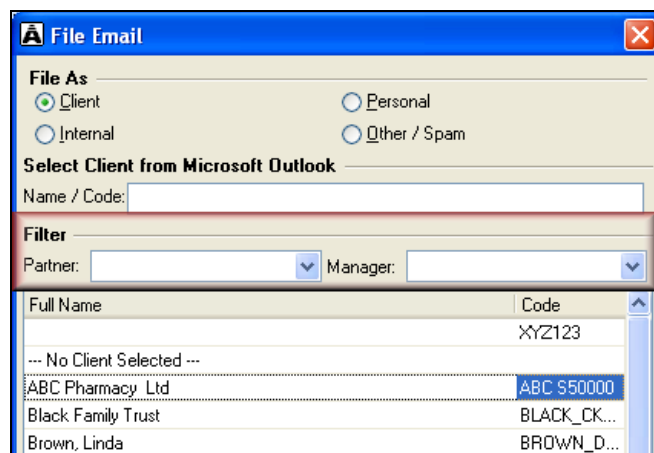
If you are NOT using a CRM system you can use an Outlook Contacts folder as the primary store for your contact details. You can then regularly import these details from Outlook into the *Contacts* window using the administration module of Acclipse Document Manager.



Importing contacts into Acclipse Document Manager

Filtering list of contacts

Acclipse Document Manager enables you to filter your contacts according to partner or manager when you search for a contact, merge a document, or file an email. If you want to use of these filters, enter or import the relevant information in the *User 3* and *User 4* fields in the *Miscellaneous* section of Outlook.



Filtering your list of contacts when preparing to merge a document

Storing client documents on your network or elsewhere

If you already have a folder structure on your network where you save your client documents (eg customer contracts, letters, faxes) you can link this folder structure to the appropriate contacts using EITHER of these methods:

- Manually link each contact using the *Additional Information* area on the *Contacts* window.
- Enter the preferred folder name for each contact in the *Account* field of the *Miscellaneous* section of Outlook and ask Acclipse Support to link all contacts to the appropriate folders as part of the initial implementation process.

If the folder link does NOT yet exist you can automatically create a (client name) document folder when you file an email or use the *Save Into* button.

NOTE: You may wish to link multiple contact records to one folder. For example, if you have set up contact records for individuals associated with one customer or supplier you could save all documents and emails into the same client document folder, regardless of who you addressed the letter or email to.

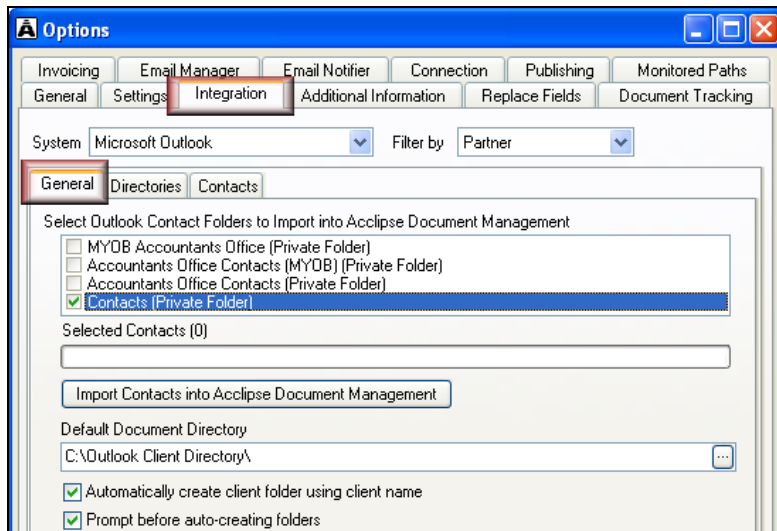
Settings for contacts

There are a range of settings you can select for your contacts under *Tools* → *Options* → *Integration* in the administration module:

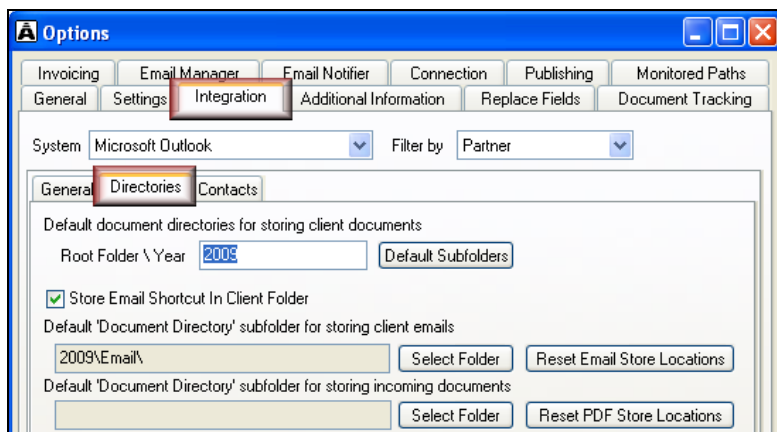
- **Select the Outlook contact folders you wish to import** – Tick the Outlook Contact folders you want to import contact records from → Click **Import Contacts**.

NOTE: You need to click Import Contacts each time you update the contact details in Acclipse Document Manager.

- **Default document directory** – The path to the server where your client documents are stored (eg *F:\Client Documents*).
- **Automatically create client folder using client name** – If the document path has NOT been set for a contact in the *Additional Information* section of the *Contacts* window, you can select this option to create a new client folder on your server and update the document path in the *Contacts* window.
- **Prompt before autocreating folders** – If you have chosen to create new client folders automatically, you can select this option to receive a warning message before creating the new folder. The warning message lets you cancel creation of the new folder (if required) and set the folder link manually in the *Additional Information* section of the *Contacts* window.
- **Root folder\year and default subfolders** – You can use these options to specify your preferred folder structure for all client directories. The directory structure you specify will automatically be added when you file an email or use the *Save Into* button.
- **Store email shortcuts in client folder** – Select this option if you want to save a shortcut to each client email in your document directory (in addition to saving the email in Acclipse Email Manager). Click **Select Folder** to choose the default subfolder in which to save client email shortcuts (eg under *2009\Emails* subfolder for each client).



Importing contact details from Outlook



Selecting your default storage locations for client documents and emails