

## Acclipse Document Manager: Administrator Training – Part One

### Course Objective

Acclipse Document Manager enables you to systemise your practice by providing easy access to client details, documents, and emails; it also provides you with a central, searchable database of company policies, procedures, checklists, and templates. This course is the first part of the Administration training and covers the basic layout of Acclipse Document Manager, how to log into the Administration Module and setting up Business Templates.

### Course Duration

Allow 1 Hour

### Basic User Features

#### The Acclipse Toolbar

- Home
- My Email
- Contacts
- Search
- Team
- Tools
- Help

#### The Intranet & Searching

#### Client Folders

Displaying inside Explorer or MYOB A0

### Administration Application Basics

#### How to Log In

#### Front Page Report (Documents)

#### Administration Application Layout

- Menu
- Text Menu
- Graphical Menu
- Navigation Panel
- Information Panel

#### Reports

#### Changing the Admin Password

#### Using Help

### Navigation Panel

#### Icons

Sections available only in Admin

### Business Templates

#### Adding a New Business Template

#### Create a Blank Business Template

#### Working with Client Fields

#### Bookmarks

#### Adding a Standard Text Mark

#### Editing an Existing Business Template

### Working with Replace fields

#### Adding Replace Fields to Documents & Templates

#### Creating Default Replace Fields

Please Note: If you have Acclipse PDF Manager and/or Acclipse Email Manager these will also be covered in the training sessions.