

Acclipse Document Manager: User Training

Course Objective

Acclipse Document Manager enables you to systemise your practice by providing easy access to client details, documents, and emails; as well as a central, searchable database of company policies, procedures, checklists, and templates. This course is designed to familiarise you with the Acclipse Document Manager tools and functionality.

Course Duration

Allow 1 Hour

Basics

Acclipse Document Manager Features
Opening Acclipse Document Manager within Outlook
Document Management

Acclipse Document Manager Layout

- Acclipse Document Manager Toolbar
 - Home
 - My Email
 - Contacts
 - Search
 - Team
 - Tools
 - Help
- Documents Menu
- Applications
- Main Information Panel
- My Mail, My Calendar & My Tasks Panel

Categories

- What's New?
- Favorites
- Organisation
- Policies
- Procedures
- Knowledge Base
- Web Links
- News
- Understanding Categories

Content

Viewing Content and Settings
Emailing Content

Personalising Acclipse Document Manager

Changing the Display Options

Favourites

Adding a Document to your Favorites
Removing a Document from your Favorites

Search

Searching your Content and Emails
Searching client documents
Performing Advanced Searches

Client Documents

Creating Client Documents in Acclipse Document Manager
Creating Client Documents in Microsoft Word
Viewing Client Documents
Merging Multiple Client Documents
Saving into Client Folders

Contacts

Viewing Client Contact Details
Logging onto tax website
Managing Client Documents
Viewing Client Emails

Collaborating with Team Members

In-Out Board

- Setting your Status to In or Out
- Searching for a Team Member
- Filtering the Team List
- Changing the Sort Order of the Team List
- Viewing a Team Member's Contact Details from the In-Out Board

Phone List

- Viewing the Phone List
- Emailing from the Phone List
- Searching for a Team Member in the Phone List
- Filtering the Team Phone List
- Changing the Sort Order of the Team Phone List

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