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.

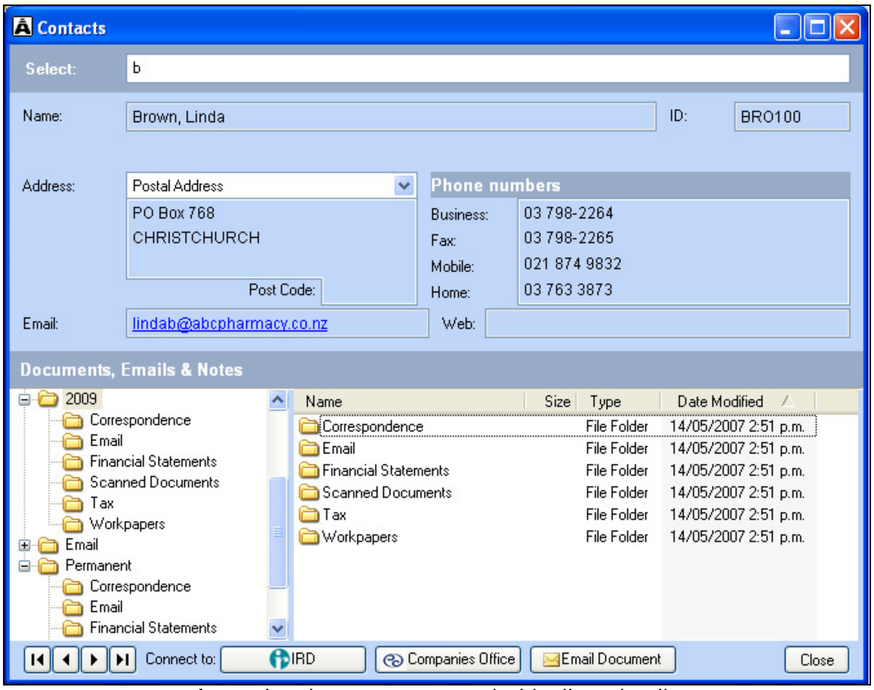
   TIP: Click the retract icon to minimise any unwanted sections.

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.



Accessing documents merged with client details