

Auto populating billing fields in AccuRoute Desktop

Use the following procedure to attach a document from your DM DMS client. When the document gets attached to AccuRoute Desktop, the billing fields are auto populated with billing information entered in the DMS client.

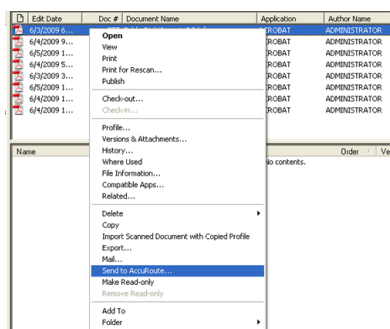
Before you perform the procedure, verify that your Omtool Server Administrator performed the required server configurations for auto populate to happen. For more information consult the LOP installation and configuration guide.

To test auto populate billing in AccuRoute Desktop:

- 1 Open DM and select the document that you want to attach.

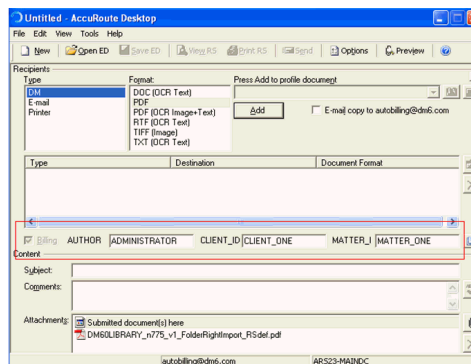
Note: You must select a document whose billing fields are filled in from before.

- 2 Right click the document. Select **SEND TO ACCURROUTE** from the drop down menu options.



- 3 Login to AccuRoute Desktop.

The billing fields, (in this case **CLIENT_ID** and **MATTER_ID**) are filled in with the information from the document in DM repository.



The **AccuRoute Desktop** application opens prompting you to login. The document you selected is added as an attachment.

