AccuRoute Desktop quick start guide

Sending an End of Load file to CT Summation using AccuRoute Desktop

Use the following procedure to send a message using AccuRoute Desktop. For detailed information on sending messages using AccuRoute Desktop, consult the <u>AccuRoute Desktop user guide</u>.

To send an End of Load file message using AccuRoute Desktop:

I Start AccuRoute Desktop. Log in if prompted. The AccuRoute Desktop application opens.

🔿 Untitled - A	ccuRoute Desktop		
<u>File E</u> dit <u>View</u>	<u>T</u> ools <u>H</u> elp		
] 🗋 New 🛛	🚰 Open ED 🛛 📓 Save ED 🗍 💁	iew RS 🛃 Brint RS 🕴 i 🖬 Send	🔄 Options 🛛 💭 Preview 🛛 🥝
Recipients	Format:	Press Add to profile doo	cument 🔘
E-mail	TIFF (Image)	Fress Add to pione doc	
Fax Printer Summation		, Add [E-mail copy to jane@yourcompany.com
TRIM			
Туре	Dest	ination	Document Format
			×
•			
Eiling			<u>m</u>
S <u>u</u> bject:			
Comments:			
Attachments:	E Submitted document(s) here		0
			×
			HIRIECIIE

- 2 Select the **Recipient** type as **SUMMATION** in the **RECIPIENTS TYPE** list.
- 3 Verify that TIFF (image) is selected as the file format. Click ADD. The Summation configuration wizard opens.

mmation Configuration Wizard		
Case Specify the	case and type of operation to perform.	
<u>C</u> ase Name:	Case001	
	C Store Document	
	End of Load file	
	< Back Next > Cance	1

4 From the **Case Name** drop down, select a case name and then select **END OF LOAD FILE** option.

5 Click **NEXT.** A summary page opens.

C	
Summary Summary of values selected are shown below. Verify them.	
Press Finish to complete, Back to return to previous screens to edit values.	
Case Name: Case001	
Options: End of Load file	
< <u>B</u> ack Finish	Cance

6 Click **FINISH** to close the wizard.

The Summation destination appears in the message.

🗇 Untitled - AccuRoute Desktop 📃 🗆 🗙						
Elle Edit View Iools Help						
📄 🗋 <u>N</u> ew 🛛 🙆	🚰 Qpen ED 🛛 🛃 Save ED 🔹 View RS	⊴Print RS =3Send Di Options 🖗 Preview @				
Recipients						
Туре	Format:	Press Add to profile document				
E-mail	TIFF (Image)	_ <u></u>				
Fax Printer		Add E-mail copy to jane@yourcompany.com				
Summation						
TRIM						
Туре	Destination	Document Format				
Bummatic		TIFE (L)				
Junnau	a1	TIFF (image)				
•						
E Biling						
Content		<u>I Ma</u>				
		1				
S <u>u</u> bject:	Employee info					
Comments:	Contains data pertaining to full time company	y employees.				
Attachments:	Suprime document(s) here	Ū				
	EmployeeInfo.xls	×				
	1					
	jane@yourcompa	iny.com HIBISCUS				

- 7 Add content to your message.
 - **a** Locate the **CONTENT** section at the bottom and type a subject and comments.
 - b Add any attachments you want to send with your message. Click the paperclip icon and do one of the following:

Omtool, Ltd. • 6 Riverside Drive, Andover, MA 01810 • http://www.omtool.com Omtool Europe • 25 Southampton Buildings, London WC2A IAL United Kingdom

© 2010 by Omtool, Ltd. All rights reserved.

Continued: Sending an End of Load file to CT Summation using AccuRoute Desktop

- **FILE** Select this option to attach a file saved from your computer or network share. Go to the file, select it, and click **OPEN**. The file appears in the attachments list.
- WEB DOCUMENT Select this option to attach a web page from the Internet. Enter the address of the web document, choose a file name for the attachment, select a file format for this attachment (such as PDF or HTML), and click OK.

🔿 Untitled - A	ccuRoute Desktop			- 🗆 🗵
Eile Edit Viev	v <u>T</u> ools <u>H</u> elp			
New 6	🚰 Open ED 🛛 🚽 Save ED	View RS 🛃 Print RS	5 🔄 🖂 Send 🔄 Options 🛛 💭 Preview	۲
Recipients Type E-mail Fax Printer Summation TRIM	Format TIFF (Imay		dd to profile docume <u>nt</u>	
Type Summat	on	Destination	Document Format TIFF (Image)	
Entent				•
	F 1 1 1 1 1			
Subject Employee info Comments: Contains data pertaining to full time company employees.				
Attachment <u>s</u> :	Submitted document(s)	here		×
,	ja	ane@yourcompany.com	HIBISCUS	

- 8 Optionally, save the message. You can do one of the following:
 - Save the message as an Embedded Directive -To save as an Embedded Directive, click SAVE ED on the toolbar. In the Save As page, enter a descriptive title in the Title text box. Click SAVE.
 - Print a Routing Sheet that can be scanned with hard copy documents - To generate a Routing Sheet, save the message as an Embedded Directive. Then click **PRINT RS** on the toolbar. AccuRoute Desktop creates a Routing Sheet containing the Embedded Directive and displays it as a PDF file on your desktop. Print the Routing Sheet and include it as the first or last page of the hard copy document. Take the document to a network scanner and scan it using the instructions provided by your network administrator. (Your message can include both electronic and hard copy documents.)

9 Send the end of load file Routing Sheets through the standard network scanning process.

When you send a message and it is delivered to the AccuRoute sever for processing. After the messages are processed by the server, the output TIFF and OCR text files are generated in the **Final** folder. The load file (with DII format) is generates in the **Working** folder.

Omtool, Ltd. • 6 Riverside Drive, Andover, MA 01810 • http://www.omtool.com Omtool Europe • 25 Southampton Buildings, London WC2A IAL United Kingdom

© 2010 by Omtool, Ltd. All rights reserved.