Using QuickFile with NetDocuments

Introduction

QuickFile 4.0 has a number of features implemented in it specially for users of NetDocuments.

The NetDocuments specific features include:

1. Hide Archive Folders when filing emails: QuickFile has an option that prevents users from accidentally filing emails into ND –Archived folder.

    The ND –Archived folder is used by the NetDocuments EMS Software. Users should not file emails into this folder directly. Instead emails should be filed to the ND –Send to NetDocuments folder. THE EMS software will move it from there to the Archived folder once the emails are uploaded into NetDocuments.

2. Hide Recent Customers when filing emails: The NetDocuments workspace creates a My Customer and a Recent Customers folder in Outlook. This can be confusing to the user when searching for folders as the same folder can appear twice.

    QuickFile 4 has an option to hide any search results that are under the Recent Customers folder.

3. Special Scan feature that will scan the ND –Archived folder and build shortcuts for email filing:

    QuickFile can scan existing folders and build a list of email address-folder associations (Preferred folders or Shortcuts) to speed up filing.

    For NetDocuments users, QuickFile 4 can scan subfolders of the ND –Archived folder (where the emails are moved by EMS) but make preferred folders/shortcuts to ND –Send to NetDocuments folder (where users actually file their emails).

4. Attachment-File: A new button has been added to the QuickFile toolbar to allow you to file email attachments from Outlook straight to the NetDocuments system (without needing to file the actual email if you don't want to).

These features have already been implemented in the current BETA version of QuickFile 4.

Configuring QuickFile for use with NetDocuments

1. Install QuickFile Version 4. If you have not been given a link to the file by you reseller, you can download a copy from: http://www.standss.com.

2. Start Outlook and go to your Inbox.

3. Click Tools-Standss-QuickFile-Settings.
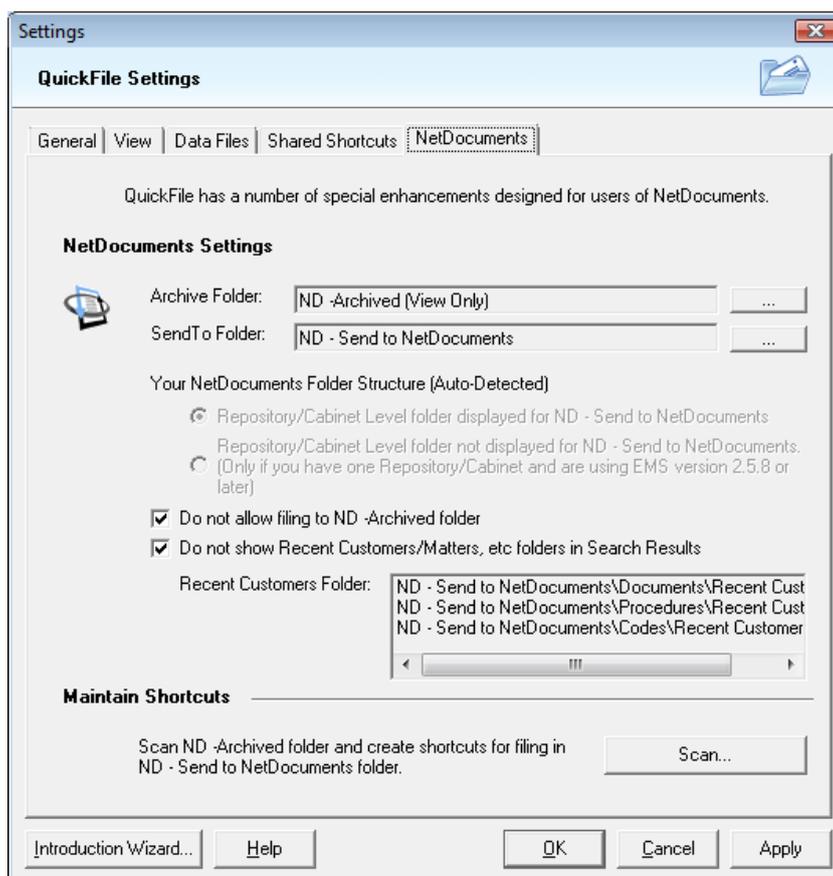
4. Ensure that the two check-boxes are ticked.

5. If you have renamed the ND –Archived folder or the ND – Send to NetDocuments folders from their default names then choose the correct folder using the browse buttons.

6. Click the Scan button. This will scan the existing emails in your ND- Archived folder and build preferred folders/shortcuts to speed up your filing.
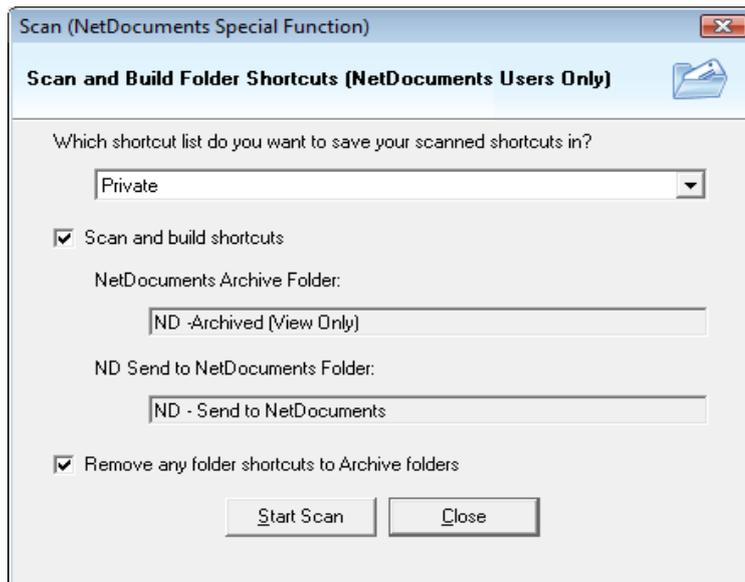
7. Click Start Scan.

8. A message will be displayed once the scanning is completed. Click OK.

9. Click Close to return to the Settings screen

10. Click OK to close the Settings screen and return to Outlook.

Learning to use QuickFile

The fastest way to learn QuickFile is using the **QuickFile Reference and Tutorial Card**. This is a two page PDF document that gets installed with QuickFile (and delivered as an email to your Inbox).

Once you have installed QuickFile, you can open this document from the Windows Start Menu. Click *Start All Programs > Standss Outlook Addins > QuickFile > QuickFile Reference & Tutorial Card*

We should have also supplied the QuickFile Reference and Tutorial Card to you with this document. Please contact us at sales@standss.com if you do not have a copy of this document.

Thank you for using QuickFile for Outlook.

For Further Information

If you have any questions about this, please email your contact person at Standss. If you do not have a contact person then please email at support@standss.com.

We also frequently update our Knowledge Base and Frequently Asked Questions (FAQ) pages on our websites.

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