



Outlook users organize and share email messages.

Built-in email file management in Document Locator makes it easy for people using Microsoft® Office Outlook® to capture, organize, and share their email messages in the document management system.

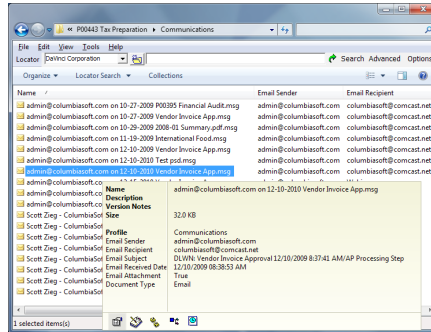
Combining email messages together with documents of all types in a single system improves the organization of related content, like project records, client communications, vendor information, and more.

- Customizable email rules automatically capture and profile email messages from within Outlook.
- Integrated document management buttons in Outlook make it easy to manually save and manage messages.
- Related email threads can be viewed for fast research.
- Email messages are full-text searchable and organized with metadata.

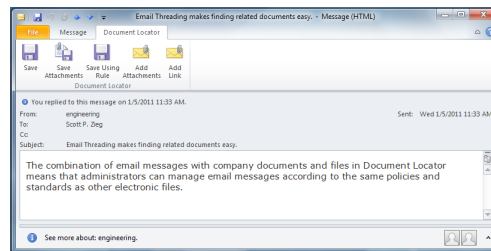
Email rules automate the capture of messages and attachments.

Document Locator adds customizable Email Rules within Microsoft Outlook that allow users to configure how messages are handled in the document management system. Rules can sort, distribute, profile, and save emails, electronic faxes, voice mails, and attachments as soon as they arrive in Outlook inboxes.

- Rules can automatically attach profiling information to email messages based on content, or prompt users for profiling when email is imported.
- Rules can automatically notify users based on email content or subject.
- Rules can track all communications on a contract, a project, or other important business activity.
- Faxes can be automatically captured from a fax folder in Outlook, and are instantly full-text searchable in the system.



Email communications are saved, shared, and managed in the document management system.



Document management buttons are built-in to the toolbar in Microsoft Outlook.

Benefits

- **Email collaboration**
Share email content with project team members, co-workers, vendors, and other authorized people.
- **Email file management**
Organize, secure, and manage email messages like any other file type, in a full-text searchable system.
- **Improved Exchange Server performance**
Allows users to store email in a system outside of Exchange Server or .pst files.

Solutions

- **Project management**
Capture and archive incoming communication from vendors, contractors, and clients.
- **Customer support**
Keep track of customer requests for orders and assistance that come in via email.
- **Business continuity**
Improve disaster recovery by including important email communications and attachments in your recovery plan.

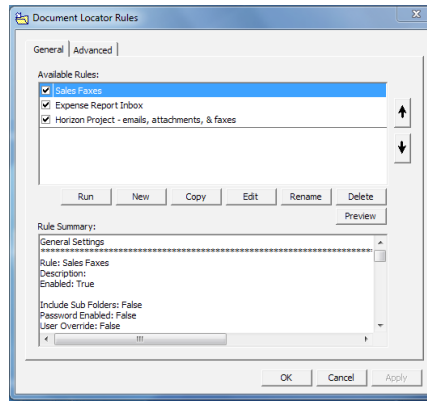
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Email rules menu configuration makes it easy to customize.

Users have complete flexibility to manage and organize their email communications with easy email rules menu configuration.

- A preview function tests rules to make sure they capture email as expected.
- Email rules can be saved, distributed, and password-protected so that to enforce company policies.



Email rules are fully customizable, and easy to create and manage.

Optional Email Archive Server adds an enterprise solution.

The optional Email Archive solution, a separate component, captures all email messages and attachments, company-wide, via Microsoft Exchange Server journaling.

Related Features

- **Optional Email Archive Server**
Manage email at the enterprise level for regulated compliance and risk reduction.
- **Automated Workflow**
Automate business processes and the flow of information.
- **Security and Auditing**
Control access to information and record an accurate audit trail.
- **Document Profiling**
Categorize files with descriptive metadata values that improve organization and retrieval.
- **Microsoft Integration**
People remain in a familiar working environment.
- **Records Management**
Records policies apply to email messages like any other business records.
- **Searching**
Instantly find emails and related documents.
- **Security and Auditing**
Restrict access to sensitive email content.

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