

Thank you for using QuickFile for Outlook. The following instructions should help you get started quickly.

If you have any questions, you can find additional information in our <u>Knowledge</u> <u>Base</u> or you can contact our support team at <u>support@standss.com</u>

If you're using a trial version, <u>click here</u> to purchase and register when you are ready.

Filing Received Emails

Quick File makes it easy to file your received emails by learning and recommending folders.



Click the recommended folder on the Ribbon or click the drop-down to select a different folder.

(Pro Version) You can also create tasks and appointments from emails by using the buttons on the QuickFile ribbon.

Finding Folders

Finding folders in QuickFile is quick and easy.



Click Find & Goto Folder on the Ribbon... and type a few characters from the folder name.

Filing Sent Emails

QuickFile makes it easy to file sent emails by prompting and recommending a folder anytime an email is sent.

	Send&File - QuickFile	
Search: Type folder no	ame here and/or select from list below	r
Folder	Path	^
Best		
📕 Employee Benefits	\\Deepak Chand\2014\Employee Benefits	
Enquires	\\Deepak Chand\2014\Enquires	
Follow-ups	\\Deepak Chand\2014\Follow-ups	
Irrigation Project	\\Deepak Chand\2014\Irrigation Project	
Prospects	\\Deepak Chand\2014\Prospects	
Favorites		
📁 Sales	\\Deepak Chand\Sales	
Recent		
📁 Employee Benefits	\\Deepak Chand\2014\Employee Benefits	
Enquires	\\Deepak Chand\2014\Enquires	
Follow-ups	\\Deepak Chand\2014\Follow-ups	
Irrigation Proiect	\\Deepak Chand\2014\Irrigation Proiect	~
File: Original email OCopy of		>>
Refresh New Folder Do not show this screen again on	Send Only Send&Delete Send&File Close Outlook Send Click Send&File Send&File Send&File Send&File	

(Pro Version) You can also click advanced options to automatically create a task, appointment or eeminder after the email is sent.

(Pro Version) Deferring Emails out of Your Inbox

Need a cleaner Inbox. Move emails out until you need them.

	eemind me!	- een	hinders	
Whe	n do you want the email(s) to r	eturn to g	your Inbox?
)ate:	09-Apr-2014	~	Time:	08:51 AM
Follo	<choose custom="" time=""> Now 10:00 AM 02:00 PM 30 mins 1 hour 2 hours</choose>	9r	quick-pic	k options
	3 hours Isc Tomorrow Friday Saturday Sunday Monday Tuesday Wednesday 1 week	-	OK	Cancel
	2 weeks Maintain Quick-pick list			

Click the eeminders button and the email will be moved to the eeminders folder. It will come back to your Inbox on your chosen date and time. (You can also Send & eemind to get reminded to follow up on sent emails)

(Pro Version) Following up on Emails

You can set an eeminder for yourself so that you get reminded to follow up on emails that you have sent.

QuickFile will display the Send & File screen when you send your email.

Folder		Path
Best		
Employee B	enefits	\\Deepak Chand\2014\Employee Benefits
Enquires		\\Deepak Chand\2014\Enquires
-		opointment/Task
Date: 26-Jun-2 Hint: Clic	te eeminder 1014 k the Date drop-o	Time: 02:32 PM down for quick-pick options
Date: 26-Jun-2 Hint: Clic Follow-up Note	te eeminder 1014 k the Date drop-o	✓ Time: 02:32 PM

Click the Advanced Option link to and select the eeminders tab. Select when you wish to be reminded and then click Send & File.

(Pro Version) Batch Filing Emails

You can use QuickFile's Batch Filing function to move many emails out of a folder at one time.

This is very useful for filing emails that you may had previously read or sent from your Smart Phone or Tablet.

	ay: Selected emails	from 'Inbox' Folder	:			
Char	nge item to show					
	Date	From/To	Subject	File To		Procedure Document
✓	15-Apr-2014 06:	rahul.kishoreko	Adobe Brackets	Programming (\\kish	~	
•	15-Apr-2014 06:	rahul_kishore@	Procedure Document	Programming (\\kish	<	Forward me the procedure document, I'll upload it back into SharePoint.
✓	15-Apr-2014 06:	kishorer@stand	Irrigation Project follow up	Irrigation System(\\kis	<	
✓	15-Apr-2014 06:	kishorer@stand	Forest Project follow up	Forestry Project(\\kish	<	
✓	10-Apr-2014 12:	goundarp@sta	RE: Enquiry about email	Recruit(\\kishorer@st	~	
•	02-Apr-2014 08:	kumara@stand	Greetings	Potential Recruits(\\ki	×	
✓	01-Apr-2014 12:	sanjays@stands	Please create an MSI file f	Small Startups(\\kisho	<	
	14-Apr-2014 04:	penjueliw@sta	Smart Schedules	Potential Recruits(\\ki	~	
	08-Apr-2014 12-	kumara@stand	Hello Kishore	Potential Recruits(\\ki	×	
	00 Apr 2014 12			C		
	08-Apr-2014 12:	sanjays@stands	RE: IMAP Prompt	Small Startups(\\kisho	~	
	•		RE: IMAP Prompt RE: Delay delivery with co	Potential Recruits(\\kisno	< <	
	08-Apr-2014 11:	kumara@stand	•		-	
	08-Apr-2014 11: 07-Apr-2014 11:	kumara@stand sanjays@stands	RE: Delay delivery with co	Potential Recruits(\\ki	~	
	08-Apr-2014 11: 07-Apr-2014 11: 07-Apr-2014 08: 07-Apr-2014 08:	kumara@stand sanjays@stands sanjays@stands	RE: Delay delivery with co FW: New Version of Quick	Potential Recruits(\\ki Small Startups(\\kisho	< <	
	08-Apr-2014 11: 07-Apr-2014 11: 07-Apr-2014 08: 07-Apr-2014 08: 15-Apr-2014 12:	kumara@stand sanjays@stands sanjays@stands addins4outlook	RE: Delay delivery with co FW: New Version of Quick FW: New Version of Quick	Potential Recruits(\\ki Small Startups(\\kisho Small Startups(\\kisho	< < <	

Click More Actions-Batch Filing and follow the instructions on the screen.

(Ultimate Version) Exporting Emails

You can use QuickFile to export emails out of Outlook to Word, HTML, PST and PDF format.

	H Find & Goto Folder 🔹
Employee Benefits •	More Actions -
	Batch Filing
	🖶 Print Manager
	Print with Marks
	Export E-mails
	Newsletter
	Newsletters - Process Now
	Settings
	Check for Updates
	Contact Support
	Help
	About QuickFile for Outlook

Click More Actions - Export Emails and follow the instructions on the screen.

(Ultimate Version) Printing Emails for Filing

You can use QuickFile's PrintManager to print out all sent and received emails for the day (except those you mark as private) for filing.



Click More Actions-Print Manager and follow the instructions on the screen.

Getting More Information

We trust that QuickFile will become an important part of your email productivity toolset.

If you have any questions, you can find additional information in our <u>Knowledge</u> <u>Base</u> or you can contact our support team at <u>support@standss.com</u>

If you're using a trial version, <u>click here</u> to purchase and register when you are ready.

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System Requirements



QuickFile requires a working installation of Microsoft Outlook 2007 or Microsoft Outlook 2010 or Microsoft 2013. QuickFile is fully compatible with Microsoft Windows XP, Vista or Windows 7 and Windows 8. Approximately 9.6MB of free disk space is required.

NOTE: QuickFile does NOT work with Outlook Express.

Installation

To install QuickFile on a computer, you need to have administrative rights. The installation process doesn't take much time.

Before you run the setup file, make sure that Microsoft Outlook is closed.

All you need to do is to run the setup file and follow the instructions. There is no need to reboot, so you can run the program right after it is installed on your machine.

After installation is complete, start Microsoft Outlook. You should see the QuickFile toolbar/ribbon.

If the QuickFile toolbar/ribbon does not appear, restart your computer and then re-open Outlook.

Windows sometimes has a hidden copy of Outlook running which prevents QuickFile from starting.

Uninstall

To uninstall QuickFile:

- Exit Microsoft Outlook.
- Go to Control Panel > Programs > Uninstall a program
- Find 'QuickFile for Outlook' in the list and click Uninstall

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you better.

Frequently Asked Questions (FAQ)



If you do not find the answer to your questions on this page, you may find more information in our **Knowledge Base** .

The following are the main questions asked by QuickFile users. Please e-mail us at support@standss.com if your question is not answered below.

Compatibility

- What versions of Windows does QuickFile work with?
- What versions of Outlook does this software work with?

Installation and Registration

- <u>How can I get an executable copy of QuickFile to install on my computer?</u>
- <u>How can I register QuickFile on my computer?</u>
- I get an error message saying "Registration Unsuccessful" while activating QuickFile?
- I get an error message "The unlock code has already been activated on another computer." while activating QuickFile?

License Enquiries

- <u>I have misplaced my unlock code</u>. How can I retrieve my registration <u>information</u>?
- How do I transfer my license from one computer to another?
- <u>I need to reformat my computer. Will my unlock code still work after</u> reformatting.

General Questions

• When I enter the name and the unlock code QuickFile tells me Registration Unsuccessful. What do I do?

- I cannot see QuickFile when I launch Outlook?
- I am not able to use QuickFile as a non-admin user?
- Do keyboard shortcuts work for filing e-mails?

Compatibility

What versions of Windows does QuickFile work with?

QuickFile is fully compatible with Windows XP, Windows Vista, Windows 7 and Windows 8.

What versions of Outlook does this software work with?

QuickFile can be used with Microsoft® Outlook ® 2007, 2010 and 2013.

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Installation and Registration

How can I get an executable copy of QuickFile to install on my computer? Click on the link below to download QuickFile:

http://www.standss.com/quickfile/download.htm

How can I register QuickFile on my computer?

Click on this link to get detailed instructions on how to register QuickFile on your PC.

I get an error message saying "Registration Unsuccessful" while activating QuickFile?

This error normally occurs if you are either:

- 1. Entering your unlock code or name incorrectly or
- 2. Have installed the wrong software.

Click here for detailed instructions to solve this problem.

I get an error message "The unlock code has already been activated on another computer." while activating QuickFile?

Each license of QuickFile can be used on one computer only. If you are installing the software on the same computer and this message appears, please contact our support team with details.

If you wish to transfer your license from one computer to another (e.g. you have purchased a new computer), <u>click here for instructions on transferring licenses between computers.</u>

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License Enquiries

I have misplaced my unlock code. How can I retrieve my registration information?

<u>Click here</u> and follow the instructions on the page to retrieve your unlock code.

How do I transfer my license from one computer to another?

To transfer a license from one computer to another, you need to deactivate it on the first computer before it can be activated on the second.

To deactivate please follow the steps below:

- From MS Outlook, select Tools menu Standss
- Choose QuickFile
- Click About QuickFile
- Click the **Deactivate** button to deactivate.

You will now be able to install the software on another computer and activate it again.

I need to reformat my computer. Will my unlock code still work after reformatting. Please deactivate your software first before formatting your computer. This will enable you to install and activate again after formatting.

To deactivate please follow the steps below:

- From MS Outlook, select the Tools menu Standss
- Choose QuickFile
- Click About QuickFile
- Click the **Deactivate** button to deactivate.

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General Questions

When I enter the name and the unlock code QuickFile tells me Registration Unsuccessful. What do I do?

This may be due to one of the following reasons:

1. Incorrect name and/or unlock code

Make sure that the name and unlock code is typed exactly as shown in your original e-mail. Pay particular attention to spaces and capital letters. Also try to actually type it in instead of cutting and pasting. On some computers we have found that pasting adds some hidden characters.

2. You are using Pocket PC/Palm device and /or Outlook is open

Before installing QuickFile make sure that you unplug any Pocket PC/Palm device if you are using one. Also ensure that Outlook is closed. To do this, do the following:

(If you are using a Pocket PC) Disconnect your Pocket PC from your computer. Restart your computer.

If you are not using a Pocket PC, press CTRL-ALT-DEL and click Task Manager. Click Processes tab and make sure that Outlook.EXE is not running.

3. When typing in the numbers, don't use the number keypad off to the right of your keyboard, because they are sometimes interpreted as different characters and it will not be accepted, although it may look right to you.

I cannot see QuickFile when I launch Outlook?

QuickFile may be disabled by Outlook. To re-enable QuickFile:

- 1. Start Outlook
- 2. Select Help About Microsoft Office Outlook
- 3. Click Disabled Items button
- 4. Select QuickFile for Outlook
- 5. Click Enable

If the above does not solve your problem, Check to see that QuickFile is installed properly.

- 1. Start Outlook
- 2. Click Tools Options
- 3. Click Other tab
- 4. Click on the Advanced Options button
- 5. Click on Com-Addins... button
- 6. Verify that QuickFile is on the list, and it should be ticked.
- 7. If QuickFile is not ticked, then do so.

If your problem is unsolved try reinstalling QuickFile for Outlook

I am not able to use QuickFile as a non-admin user?

To use QuickFile as a non-admin user follow the steps below:

1. Login as the non-admin user.

- 2. Go to "C:\Program Files\Standss\QuickFile for Outlook" folder
- 3. Double click on "QuickFileVB.reg" file
- 4. Click Yes
- 5. Click OK

This should allow a non-admin user to use QuickFile.

Do keyboard shortcuts work for filing e-mails?

Keyboard shortcuts can be used to file an e-mail using QuickFile as below:

Outlook 2007 and below:

- 1. Click "**More Actions**", on the QuickFile toolbar.
- 2. Click on "Settings"
- 3. A settings screen will appear for QuickFile, goto the "**Keyboard Shortcuts**" tab and add your personal shortcuts.
- 4. You can use these shortcuts to file, find and even open the QuickFile Screen.

Outlook 2010/2013:

- 1. Click "**More Actions**",on the ribbon under the Home tab in the QuickFile Section
- 2. Click on "Settings"
- 3. A settings screen will appear for QuickFile, goto the "**Keyboard Shortcuts**" tab and add your personal shortcuts.
- 4. You can use these shortcuts to file, find and even open the QuickFile Screen.

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If you do not find the answer to your questions on this page, you may find more information in our **Knowledge Base** .

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File Incoming emails



You can use QuickFile to file your emails from your Inbox or any other folder. Click on the QuickFile drop-down button. QuickFile will suggest 5 folders where you may file the selected email(s) (marked as **A**) as shown below:



Click on the folder you want to file the selected email(s) to and the email(s) will be filled away.



If your folder is not available in one of the suggested items, click on QuickFile button (marked as **B**) to open the QuickFile screen:

Folder	Path			
Best				
💼 Employee Benefits	\\Deepak Chand\2014\Employee Benefits	×	Remove from Best	
Enquires	\\Deepak Chand\2014\Enquires			
Follow-ups	\\Deepak Chand\2014\Follow-ups	F	Add to Favorites	
Irrigation Project	\\Deepak Chand\2014\Irrigation Project		Remove from Favorites	
Prospects	\\Deepak Chand\2014\Prospects	2	Goto Folder	
2014	\\Deepak Chand\2014	2	Open Folder	
avorites		Ep	Rename Folder	
Sales	\\Deepak Chand\Sales	1	Move Folder	
Recent			New Folder	
2014	\\Deepak Chand\2014		Constant All Colders	
Employee Benefits	\\Deepak Chand\2014\Employee Benefits		Expand All Folders	
Enquires	\\Deepak Chand\2014\Enguires		Clean Suggestions	

You can type part of the folder name in the search box to search for your filing folder or select the folder from the list. The following table describes the actions/options available on the above screen:

Options	Description
Right-click folder list options	You can perform the following actions on the selected folder: - Add the folder to QuickFile Favorites list - Remove the folder from the QuickFile Favorites list (Note: the folder will not be deleted from your Outlook) - Go to the selected folder - Open the selected folder in a new window - Rename the selected folder - Move the selected folder - Create a new folder under the selected folder

File: Original email or Copy of email	File to move original or to file a copy of the select email(s)
Refresh	Re-load the folders list in QuickFile again (if you do not find your folder in the list)
New Folder	Create a new folder under the selected folder
QuickFile	File the email(s) to the selected folder(s) in the list
Close	Exit QuickFile screen without doing anything

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File Outgoing emails



Filing outgoing emails is as easy as filing your incoming emails. When you have finished writing your email, Click 'Send&File' button on the QuickFile ribbon:

ः El Send&File	Print YES	
Print With	Marks 🕜 Help	
Project	-	
	QuickFile	G.

The following Send&File screen will be shown:

	Send&File - QuickFile
Search: Type fold	er name here and/or select from list below Clear
Folder	Path
Best	
📹 Employee Benefits	\\Deepak Chand\2014\Employee Benefits
Enquires	\\Deepak Chand\2014\Enquires
Follow-ups	\\Deepak Chand\2014\Follow-ups
Irrigation Project	\\Deepak Chand\2014\Irrigation Project
Prospects	\\Deepak Chand\2014\Prospects
Favorites	
🧧 Sales	\\Deepak Chand\Sales
Recent	
🛑 Employee Benefits	\\Deepak Chand\2014\Employee Benefits
💼 Enquires	\\Deepak Chand\2014\Enquires
Follow-ups	\\Deepak Chand\2014\Follow-ups
Irrigation Project	\\Deepak Chand\2014\Irrigation Proiect 🗸 🗸
File: O Original email O Cop	y of email File original mail with Sent mail <u>Show Follow-Ups >></u> Send <u>Only</u> Send& <u>D</u> elete Send& <u>File</u> <u>Close</u>
Do not show this screen again	n on Outlook Send Click

QuickFile displays suggestions where you might file your emails. If the folder is not in the suggestions, you can search for the folder by typing in part of the

folder name in the search box or select the folder from the list. The following table describes the actions/options available on the above screen:

Options	Description
Right-click folder list options	You can perform the following actions on the selected folder: - Add the folder to QuickFile Favorites list - Remove the folder from the QuickFile Favorites list (Note: the folder will not be deleted from your Outlook) - Go to the selected folder - Open the selected folder in a new window - Rename the selected folder - Move the selected folder - Create a new folder under the selected folder
File: Original email or Copy of email	File to move the sent email or to file a copy of the sent email
File original mail with sent mail	If you were responding to an email (i.e. you did a Reply/Reply-All/Forward), also file the original email on which you just responded to, together with the sent email.
Refresh	Re-load the folders list in QuickFile again (if you do not find your folder in the list)
New Folder	Create a new folder under the selected folder
Send Only	The email will not be filed when sending. However, if any settings under 'Advanced Options' is set then it will be applied.
Send&Delete	The email will be deleted after sending. If any settings under 'Advanced Options' is set then it will be applied.
Send&File	Send and file the email along with any settings applied under 'Advanced Options'.
Close	Exit QuickFile screen without doing anything

For advanced users, you can click on the 'Advanced Options' link to view more options.

* **eeminders (Follow Up):** If you want to work on or follow up on this sent email(email that you are currently sending) at a later time, setup an eeminder on

it. The sent email will appear on top of your Inbox at the specified time. Under Advanced Options' on the Send&File screen, click on the 'eeminders (Follow Up)' tab:

Date:	Create eeminde	~	Time:	03:50 PM	
	Hint: Click the Date of	drop-down	for quick	pick options	
Follow	v-up Notes:				
	so Display Outlook Re	minder			

Options	Description				
Date &	Date and time when the email will appear in your Inbox				
Time	Date and time when the email will appear in your moox				
Follow-	A short note that you may add to your eeminder. This note will				
up Notes	appear at the top of your email.				
Also					
Display	An Outlook reminder will be display when the email returns back				
Outlook	to your Inbox				
Reminder					

* **Create Appointments/Task:** You can do Send&Appointment and Send&Task while sending your email. Under Advanced Options' on the Send&File screen, click on the 'Create Appointment/Task' tab:

	Create Appointment		💙 🗸 c	reate Task
Subject:	Review for Staff (kumar	a@standss.com.fj)	Subject:	Review for Staff (kumara@standss.com.fj)
Start:	11- Apr -2014 🛛 🗐 🕶	11:30 a.m. 🗸	Category:	Staff 🗸 🗸
End:	10- Apr - 2014 🛛 🖵 🔻	11:30 a.m. ∨	Start Date:	11- Apr -2014 🗐 🔻 Priority: High 🗸
	All Day Event Impo	ortance: High 🗸	Due Date:	11- Apr - 2014 🔲 💌
✓ Remin	nder: 15 minutes 🗸		✓ Remind	ler: 11- Apr - 2014 🗐 👻 10:00 a.m. 🗸

Options	Description		
Create Appointment			
Subject	Subject of Appointment		
Start Date & Time	Start date and time of the Appointment		
End Date & Time	End date and time of the Appointment		
Importance Importance of the Appointment			
Reminder	Set up a reminder for the Appointment		
Create Task			
Subject	Subject of the Task		
Category	Assign a category to the Task		
Start Date	Start date of the Task		
End Date	End date of the Task		
Priority	Priority of the Task		
Reminder	Setup a reminder for the Task		

* This feature is available in QuickFile PRO and Ultimate version only.

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With QuickFile, you can easily find and go to that folder to retrieve/view your emails. Click on the 'Find&Goto Folder' drop-down on the QuickFile ribbon:



QuickFile will suggest up to 5 folders (marked as **A**) where you may have filled emails similar/related to the selected email. Click on one of the suggestions to go to that folder.

Tip

Ctrl + Mouse click on the suggested folder will open the folder in a new window

If the folder you are looking for is not in the list, click on 'Find&Goto Folder' button (marked as **B**) to open the following screen:

Search: Type folder name here and/or select from list below		
Folder	Path	
Best		
💼 Employee Benefits	\\Deepak Chand\2014\Employee Benefits	
📁 Enquires	\\Deepak Chand\2014\Enquires	
📁 Follow-ups	\\Deepak Chand\2014\Follow-ups	
Irrigation Project	\\Deepak Chand\2014\Irrigation Project	
Prospects	\\Deepak Chand\2014\Prospects	
Favorites		
🧰 Sales	\\Deepak Chand\Sales	
Recent		
📁 Employee Benefits	\\Deepak Chand\2014\Employee Benefits	
Enquires	\\Deepak Chand\2014\Enquires	
📁 Follow-ups	\\Deepak Chand\2014\Follow-ups	
Irrigation Project	\\Deepak Chand\2014\Irrigation Project	
Prospects	\\Deepak Chand\2014\Prospects	

QuickFile displays suggestions for folders on top (under 'Best') that you may be trying to find based on your currently selected email. It also displays the folders that you have added to Quick favorites and a list of your recently used folders. If the folder is not in the top list, you can quickly search for the folder by typing in part of the folder name in the search box or select the folder from the list. The following table describes the actions/options available on the above screen:

Options	Description			
Right-click folder list options	 You can perform the following actions on the selected folder: Add the folder to QuickFile Favorites list Remove the folder from the QuickFile Favorites list (Note: the folder will not be deleted from your Outlook) Go to the selected folder Open the selected folder in a new window 			

	Rename the selected folderMove the selected folderCreate a new folder under the selected folder
Refresh Re-load the folders list in QuickFile again (if you do find your folder in the list)	
New Folder	Create a new folder under the selected folder
Go to Folder	Go to the selected folder
Open Folder	Open the selected folder in a new window
Close	Exit 'Find&Goto Folder' screen without doing anything

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File multiple emails (Batch filing) at a click of a button (PRO & Ultimate Version)

This feature allows you to bulk-file your emails into the respective folders. You can process all or selected emails from the current folder. Batch filing can also be used to file your sent emails from the Sent Items folder. These emails were either sent from your Outlook or from your mobile devices (synched via Exchange or IMAP protocol).

To access the Batch filing screen:

- On QuickFile ribbon > Click 'More Actions' > Batch Filing
- The following screen will open:

har	nge item to show					
	Date	From/To	Subject	File To		Procedure Document
~	15-Apr-2014 06:	rahul.kishoreko	Adobe Brackets	Programming (\\kish	×	
~	15-Apr-2014 06:	rahul_kishore@	Procedure Document	Programming (\\kish	~	Forward me the procedure document, I'll upload it back into SharePoint.
~	15-Apr-2014 06:	kishorer@stand	Irrigation Project follow up	Irrigation System(\\kis	¥	back into sharer onte
•	15-Apr-2014 06:	kishorer@stand	Forest Project follow up	Forestry Project(\\kish	~	
•	10-Apr-2014 12:	goundarp@sta	RE: Enquiry about email	Recruit(\\kishorer@st	×	
~	02-Apr-2014 08:	kumara@stand	Greetings	Potential Recruits(\\ki	¥	
•	01-Apr-2014 12:	sanjays@stands	Please create an MSI file f	Small Startups(\\kisho	~	
	14-Apr-2014 04:	penjueliw@sta	Smart Schedules	Potential Recruits(\\ki	~	
	08-Apr-2014 12:	kumara@stand	Hello Kishore	Potential Recruits(\\ki	×	
	08-Apr-2014 11:	sanjays@stands	RE: IMAP Prompt	Small Startups(\\kisho	~	
	07-Apr-2014 11:	kumara@stand	RE: Delay delivery with co	Potential Recruits(\\ki	~	
	07-Apr-2014 08:	sanjays@stands	FW: New Version of Quick	Small Startups(\\kisho	~	
	07-Apr-2014 08:	sanjays@stands	FW: New Version of Quick	Small Startups(\\kisho	~	
	15-Apr-2014 12:	addins4outlook	(Ebook Download) How t	<choose folder=""></choose>	~	
	11-Apr-2014 12:	addins4outlook	(Video) Two Simple Habit	<choose folder=""></choose>	×	~
			2 Outlook Tips to help yo	<choose folder=""></choose>	V	

QuickFile suggests the filing folders for each of the emails loaded. You can choose/select a different 'File To' folder if you want. The color-coding on the emails represents:

• Green: A previous email in the same thread/conversation was filed in that folder

- Black: Emails received/sent to that person/domain was filed to that folder
- Red: Emails received/sent to that person/domain was never filed using QuickFile

A default filter criteria is applied to load the un-filed items into the list as shown above. You can click on the 'Change item to show' link to apply/modify this criteria as shown below:

Select Filter Criteria - QuickFile					
Which items to show:					
 Selected Emails. 					
Show read email that have not been filed.					
Show all emails that have not been filed.					
Show all emails.					
Date Filter:					
◯ Emails Received/After: 07-Apr-2014					
All Emails					
<u>O</u> K <u>Cancel</u>					

Change the filter criteria that you want and click OK. The email list will be reloaded on the Batch Filing screen based on the new filter that you provide. Click on 'File' button to file all the ticked emails.

	Didn't find what you were looking for or having
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All rights reserved.	We want to know. Please <u>contact us</u> to help us serve
	you better.

eeminders for Emails



You can have a clean Inbox by using eeminders to defer/snooze emails. This will remove the email from your Inbox and have it reappear again at your chosen time.

To eemind (defer/snooze) an email(s):

- 1. Select the emails or post items from your Inbox.
- 2. Click on "**eemind me"** on the ribbon or toolbar



(You can also right click over the email and then click eemind me)

3. Enter the date and time that you want the email to come back to your Inbox. Hint: You can select the date and time by choosing from the date drop down as shown:



On the screen above, you can also:

- Write a follow -up note which will be displayed on the email when it returns
- Add an Outlook reminder when the email(s) return to your Inbox
- 4. Click OK

Moving email(s) back to Inbox from "eeminders" folder.

- 1. Go to eeminders folder
- 2. From the eeminder ribbon > Click on the eemind me drop-down:



The button click actions are described in the table below:

Button	Description
Return To Inbox	Returns the email(s) back to the Inbox
Return To Inbox (Clear Flag)	Clears the Follow-up Flag and returns the email(s) back to the Inbox
Return To Inbox (Flag Now)	Adds a Follow-up Flag and returns the email(s) back to the Inbox.

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Task/Schedule your Emails



QuickFile allows you to make tasks & appointments for an e-mail at a click of a button.

You will find the Quick-Task & Quick-Appointment buttons on the QuickFile ribbon:



🖻 Quick-Task

You can select an email in your Inbox (or on an open email) and click Quick-Task to open up a task for that email instantly.

You can edit your task as required and save it.

Quick-Appointment

You can select an email in your Inbox (or on an open email) and click Quick-Appointment to open up an appointment for that email instantly. You can edit your appointment as required and save it.

Tips

Shift + Mouse click on any of these buttons the respective Task or Appointment will be made and the selected email will be deleted.

*Task/Schedule outgoing emails

To send an email and then set a task **or** a appointment you can go to <u>Send&Task</u> <u>or Send&Appointment.</u>

* This feature is available in QuickFile PRO and Ultimate version only.

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Manage your Newsletter (PRO & Ultimate Version)



Declutter your Inbox or any other folder from newsletters by moving them to a separate folder for later reading.

In your current folder, click on the Newsletter 🗅 button on the QuickFile group:



The following newsletter screen will be displayed:

🚵 Newsletters 🗙
De-clutter your Inbox of Newsletters by moving them to a seperate folder for later reading. (Tell me more)
What would you like to do?
Move selected email to Newsletters folder.
Move ALL emails from Sender to Newsletters folder.
Sender: yamm@standss.onmicrosoft.com
Automatically move future emails from this sender to Newsletters folder.
Goto Newsletters Folder to read emails QK Cancel

To move the selected email(s) to the "Newsletter" folder choose *Move selected email to Newsletter folder* and then click OK.

To move selected email(s) and <u>all other email(s)</u> from that sender, select *Move ALL emails from Sender to Newsletter folder* and then click OK.

To also add the sender of this email to QuickFile's Newsletter email list, tick the option *Automatically move future emails from this sender to Newsletter folder.* This will allow QuickFile to automatically shift future received emails from that sender to the 'Newsletter' folder.

To go and view all of your newsletter emails, click on the *Goto Newsletters Folder to read emails link*.

Tip

Ctrl + Mouse click on the Newsletter button on QuickFile ribbon will take you to the Newsletter folder.

Maintaining Newsletter email address list

There are <u>two ways</u> in which you can add/remove an email address from the Newsletter Email List.

- 1. You can use the above screen from any folder to add a new email address to the Newsletter email list. To remove an email address from the list, go to the *Newsletter folder*, select the email that you no longer want QuickFile to recognize as a newsletter and click on the *Newsletter* button on the QuickFile ribbon.
- 2. Or you can do this from the <u>Settings screen</u>.

Newsletter Alert

The following newsletter alert will appear on the bottom-right-hand-corner of your screen at the time when your newsletter will arrive into your Inbox and QuickFile will shift it out to the 'Newsletter' folder.



Change Newsletter Settings

You can set/modify your newsletter settings from the <u>Settings screen</u>.

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you better.
Export your Emails outside Outlook (Ultimate Version)



In just one click QuickFile creates a Word, PDF, HTML documents or Outlook Store/Pst containing all emails associated with the client/case. All email attachments are put conveniently into a separate folder and are available directly from the document. QuickFile even creates a clickable table of contents!

To access the 'Export E-mails' screen:

For Outlook 2007:

- Click 'More Actions' on the QuickFile toolbar
- Click on 'Export E-mails...'

For Outlook 2010 and above:

- Click 'More Actions' on the QuickFile ribbon
- Click on 'Export E-mails'

The following Export screen will be displayed:

the second se	Export/Ar	chive E-mails
Export/Arc	hive all E-mails	2
What wo	uld you like to Expo	ort?
) All e	-mails in Folder	O Selected e-mails
What for	nat would you like	the emails to be output in?
• HTM	L	O PDF
O Word	d Document	◯ Store/PST
Enter a n	ame for the new fil	e to export the e-mails to
File Nam	ie:	
	Export	Close
	Export	<u> </u>

The table below describes the options/actions available on the above screen:

Options	Descriptions
All e-mails	Export all the emails from the current folder
in Folder	Export an the emans from the current folder
Selected e-	Export only the selected emails from the current folder
mails	Export only the selected emails from the current forder
HTML	Export to a html file
Word	Export to a Word document
Document	
PDF	Export to a PDF document
Store/PST	Export to an Outlook Store/PST (For more Information on how
51012/151	to view your emails after exporting <u>click here</u>
Export	Start the export process
Close	Close the screen

Click the browse button (...) to browse for a location, give a file name and click Export.

View email(s) which are exported to a Store/Pst:

When exporting using a Store/Pst option, QuickFile creates a pst at the specified location. The email(s) are exported to a folder called 'Archive' in this Store. In order to view these exported emails, follow the steps below:

For Outlook 2007:

- Inside Outlook, click "File" on the "Menu" toolbar
- Click "Data File Management..."
- Click on the "Data Files" tab
- Select the "Types of storage:" as "Office Outlook Personal Folders File(.pst)" and click "OK"
- A dialogue box will appear, choose the location of the Exported "Store/PST"
- The pst which was created using Export E-mails is now connected to your Outlook.
- You can view your emails by clicking on this PST and opening the folder named "Archive"

For Outlook 2010 and above:

- Click "File" tab, on the ribbon
- Click "Info" -> Account Settings
- Click on the "Data Files" tab
- Select the "Types of storage:" as "Outlook data file(.pst)" and click "OK"
- A dialogue box will appear, choose the location of the Exported "Store/Pst" and click "Ok"
- The Store/Pst which was created using Export E-mails is now connected to your Outlook.

• You can view your emails by clicking on this pst and opening the folder named "Archive"

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Print your Incoming and Outgoing Emails (Ultimate Version)



QuickFile allows you to print all your incoming and outgoing email(s). It maintains a list of email(s) that you have not printed out yet. You can access this list on the 'Print Manager' screen.

Print Manager

To open 'Print Manager' screen:

- Click on 'More Actions' drop-down on the QuickFile ribbon
- Click on Print Manager to open the following screen:

	e e-mails in this list may still nee				
InOut	Contact	Subject	Printed	Date	^
Rec	news@addins4outlook.com	How to Cure E	No	29-Mar-2014 12:14:AM	
✓ Rec	prasadr@standss.com.fj	FW: Functional	No	28-Mar-2014 02:56:PM	
Rec	goundarp@standss.com.fj	RE: Enquiry ab	No	10-Apr-2014 12:53:PM	
✓ Rec	kishorer@standss.onmicro	Regression test	No	10-Apr-2014 09:45:AM	
✓ Rec	kishorer@standss.onmicro	Forest Project	No	10-Apr-2014 09:44:AM	
✓ Rec	kishorer@standss.onmicro	Sales Follow up	No	10-Apr-2014 09:44:AM	
✓ Rec	goundarp@standss.com.fj	RE: Enquiry ab	No	10-Apr-2014 04:15:PM	
✓ Rec	kumara@standss.com.fj	RE: QuickFile v	No	10-Apr-2014 03:15:PM	
Rec	news@addins4outlook.com	2 Outlook Tips	No	09-Apr-2014 12:31:AM	
✓ Rec	penjueliw@standss.com.fj	Emailing: Draft	No	09-Apr-2014 04:38:PM	
✓ Rec	penjueliw@standss.com.fj	Emailing: Eemi	No	09-Apr-2014 04:23:PM	
✓ Rec	penjueliw@standss.com.fj	FW: EmailMerge	No	09-Apr-2014 02:50:PM	
Rec	sanjays@standss.com	Startup Email	No	08-Apr-2014 12:32:PM	4
<				3	F

QuickFile's Print Manager lists all of the emails that you have received and sent out which have not yet been printed. You can tick to choose which email(s) you want to print. Print Manager allows you to print in two different formats:

- 1. Word All pictures/graphics will print
- 2. Outlook Fast but pictures/graphics may not print

If you do not want to print certain emails, tick them and click 'Remove' button. This will remove the emails from the Print Manager list. **Note:** The actual email won't be deleted.

Click the 'Print' button to start the printing. After the emails are printed, the following screen is displayed:

E-mails sent to printer.	
Did the selected e-mails print properly?	Cancel
• YES	
Remove printed e-mails from Print Manager list 🗸 🗸	
Actual E-mails will NOT be deleted.	
O NO	
Leave the e-mails in the Print Manager so that I can try an	d print again.
Use above settings as my default the next time	ОК
-	

You can choose one of the following actions on the printed emails:

- 1. Remove printed e-mails from Print Manager list
- 2. Remove ALL e-mails from Print Manager list
- 3. Mark printed e-mails as printed on Print Manager list

OR you can leave the emails as is on the Print Manager list. If you tick the option to Use the above settings, the options you chose here will be saved for the next time you use Print Manager

How do I tell Print Manager to Print an email or not?

To prevent an email from being listed in the Print Manager List:

- Open the email
- Change the 'Print' drop-down to NO on the QuickFile ribbon

If you are sending out an email and you do not want that particular email to be listed on the Print Manager List:

- Compose the email
- Change the 'Print' drop-down to NO on the QuickFile ribbon
- Send out your email.

🖅 Send&File	2	Print YES	
🥞 Print With	Marks	Help	
Project		•	
	Quic	kFile	G.

Print With Marks

This feature allows you to print certain sections of your email or to print out the full email.

To open 'Print with Marks' screen:

- From your current folder, click on 'More Actions' drop-down on the QuickFile ribbon > click 'Print with Marks'

- From your open email, click on the 'Print with Marks' button on the QuickFile ribbon.

- The following screen will open:



You can click on 'Change Print Settings' link to modify which sections of the emails to print out.

Click on 'Print' button to start print the selected email(s).

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Assign emails to a Project (Ultimate Version)



QuickFile allows you to assign email(s) to Projects. This is very useful if you are exporting your emails or printing out your emails for Paper filing. The project name will be available with the email headers on the print-out or on the exported document.

Assign a Project

To assign an email to a project:

- Open the email
- Goto the QuickFIle ribbon and select an existing project from the 'Project' drop-down



• You can also add a new project by typing in a new project name in the Project drop-down and press Enter

<u>To maintain your Project List</u>

To open the Project List:

For Outlook 2007:

- Click "Tools"
- Click on "Standss" > "QuickFile" > "Project"

For Outlook 2010 and above:

- Click on the "Standss Outlook Addins" Tab
- From the "QuickFile" section > click "More" > "Project"

The following Project List screen will open:

You can add, edit or delete the project using the buttons available.

Note: When you delete a project name, Your emails that you already assign to that project will not be deleted and will still contain the project name.

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QuickFile Settings



To access the QuickFile settings screen:

- From your current folder in Outlook, goto QuickFile ribbon
- Click 'More Actions' > Settings

You can refer to the table below the screen shot for a more detailed description for each tab.

General

		Settings - QuickFile	×		
QuickFile Se	ettings		È		
General	Ultimate Data File	es KeyBoard Shortcuts			
Genera	Settings				
-	Mark Unread	message as read when filing			
	✓ Prompt to fil	e while sending emails			
	Add categor	/ 'Copy QuickFiled' when filing a copy			
	Expand All Fo	olders in QuickFile			
	Automaticall	y file original email with sent email for Forwards			
	Automaticall	y file original email with sent email for Reply/Reply-to-All			
	Show QuickF	le button on Ribbon			
	Show 8 ¥	Recently Used Folders on the QuickFile Screen.			
Action	to take upon But	ton Click			
	Quick-File:	File/Move original email to folder. 🗸 🗸			
	Send & File:	File a copy of email to folder ∨			
	Quick/Send Tasl	c: Attach Email to Task Body 🗸 🗸			
	Quick/Send App	oointment: Attach Email to Appointment Body 🗸 🗸			
Newsle	atter				
		ly process newsletters as they arrive in the Inbox.			
		here we have been a second and a			
	Newsletter e-mail addresses:				
		Add			
	Add				
		Delete			
	✓ Create Emai	to remind me to look at Newsletter Emails at: 10:00 AM 🗸			
Introduct	ion Wizard	Help OK Cancel	Apply		

Options	Descriptions
Mark Unread message as read when filing	If this option is checked and you file an unread message then QuickFile will mark this message as read.
Prompt to file while sending emails	When clicking Outlook's own "Send" button, QuickFile's Send&File screen will prompt to file your outgoing emails.
Add category 'Copy	

QuickFiled' when filing a copy	Adds a category if you choose the option to file a copy inside your Sent Items folder.
Automatically file original email with sent email for Forwards	File the original email you received along with the Forwarded email that you send out.
Automatically file original email with sent email for Reply/Reply-to-All	File the original email you received along with the Reply and/or Reply-to-All email that you send out.
Project Label	The label you will give your Projects when dealing with emails when replying.
Action to take when <i>QuickFile</i> <i>or Send&File</i> button is clicked	You can either file the original email, or a copy.
Action to take when Quick/Send Appointment or Quick/Send Task button is clicked	Attach email to Appointment Body: Choose to attach the selected email to the Appointment created. Copy email to Appointment Body: Choose to copy the body of the selected email to the Appointment created.
Automatically process newsletters as they arrive in the Inbox	As soon as a Newsletter arrives into your Inbox, QuickFile will shift it to the "Newsletter" folder for you.
Newsletter Email Addresses	You can specify which senders will most commonly send newsletter to you here.
Create Email to remind me to look at Newsletter emails	Here you can tell QuickFile when to remind you that there are pending newsletters in your "Newsletter" folder.

Printing

Settings - QuickFile ×
QuickFile Settings
General Ultimate Data Files KeyBoard Shortcuts
Print Manager
 Log all incoming (Inbox) e-mails and outgoing (Sent Items) e-mails Display Printer selection when Microsoft Word is used for printing
Projects Project Label: Project
How do you want to print your emails? Received Emails Print full emails with all "old original text" in it Print only the newest reply (remove all old original text) Print all replies in the email newer than the last recorded time that I was the sender (in case several people sent it to each other before sending it back to me) Sent Emails Print full emails with all "old original text" in it Print only the newest reply (remove all old original text) Print full emails with all "old original text" in it Print only the newest reply (remove all old original text)
My Email Accounts: Quickfile needs to know all your email accounts in order to print latest replies to your emails.
Chandd@standss.com.fj Add Delete
Introduction Wizard Help OK Cancel Apply

	Description
Log all incoming (Inbox) e-mails & outgoing (Sent Items) e-mails.	QuickFile will make a list of all emails that you have received or sent out, and you can print these emails later.
Display Printer selection when	QuickFile will allow you to select which printer you want to print from if you so choose to.

Print full emails with all "old original text" in it	You can print the entire email message of any email if you choose this option.
Print only the newest reply (remove all old original text)	You can print the most recent reply if you choose this option.
Print all replies in the email newer than the last recorded time that I was the sender.	QuickFile will only print your latest reply.
Let QuickFile detect my email addresses using the accounts I have setup in Microsoft Outlook.	QuickFile will automatically add the accounts inside of your Outlook, or you can choose to add these accounts manually.

Data Files

Settings - QuickFile	×
QuickFile Settings	i 📩
General Ultimate Data Files KeyBoard Shortcuts	
Data Files to Index	
 Default Store All Stores Selected Stores Image: Chandd@standss.com.fj 	_
Search Public Folders Too (Not recommended as it can slow down Outlook) <u>R</u> e-Index Folders <u>C</u> lean Suggestions	
Store to monitor:	
Monitor the following store/pst for Newsleter and Send&File features:	
○ Specific Store/PST: chandd@standss.com.fj	-
The folder where QuickFile stores its settings is currently hidden so it does not hinder your use of Outlook. Use the following button to show the folder: Show QuickFile Folder	
Introduction Wizard Help OK Cancel	Apply

Option	Descriptions
All Stores/Selected	QuickFile's built-in index can scan all of your accounts or QuickFile can scan <i>only the accounts</i> <i>you choose</i> .
Search Public Folders	If you're using an Microsoft Exchange Server, you can tell QuickFile to index the public folders also but this is discouraged since your Outlook can slow

	down a bit.	
Monitor the following	You can tell QuickFile which store and/or PST to	
store/pst for	monitor, by default QuickFile is set to monitor your	
Newsletters &	default PST. You can specify this by the dropdown	
Send&File features.	menu.	
Show the QuickFile	By default, the folder where QuickFile saves your settings is hidden. If you want to unhide this folder, just press this button.	
Settings folder?	Note: if you are using Outlook 2007 then this requires a restart of Outlook.	

Keyboard Shortcuts

Settings	- QuickFile ×		
QuickFile Settings			
General Printing Data Files KeyBoard Shortcuts	1		
Setup keyboard shortcuts:			
QuickFile (e.g. Ctrl + Shift + V):	Ctrl + Shift + V		
One-Click Filing (e.g. Ctrl + 1):	Ctrl + 1		
Find&Goto Folder (e.g. Ctrl + Y):	Ctrl + Y		
Quick-Task (e.g. Ctrl + Shift + T):	Ctrl + Shift + T		
Quick-Appointment (e.g. Ctrl + Shift + A)	: Ctrl + Shift + A		
Batch Filing (e.g. Ctrl + Shift + B):	Ctrl + Shift + B		
Introduction Wizard Help	OK Cancel Apply		

By default, QuickFile has some shortcuts that you may find useful. You can choose your own shortcuts here, **or** you can set your own shortcuts. Whichever suits your use of QuickFile best.

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Registering QuickFile for Outlook



The evaluation copy of QuickFile will run for 30 days after installation. The evaluation version is identical to the full version but will get disabled after 30 days.

After that you will need to register the program to continue using this powerful application.

Registering QuickFile

Restart Microsoft Outlook. The evaluation screen will be displayed. (If this screen is not displayed, you may need to restart your Computer as Windows sometimes keeps a hidden copy of Outlook running)

Click the Register button.

Enter your registered name and unlock code EXACTLY as you received it. Pay particular attention to spaces and capitalization.

Click OK to unlock the program and to continue using ALL the features of QuickFile.

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QuickFile for Outlook License Agreement



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Should you have any questions concerning this agreement, please contact: Standss (South Pacific) Limited, P. O. Box 2485, Government Buildings, Suva, Fiji or visit the QuickFile website at <u>www.standss.com</u>

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Contact Information



Any person or a company interested in cooperation with Standss (South Pacific) Limited or Addins4Oulook.com is welcome to contact us and discuss mutually profitable business relations.

Address:

PO Box 2485, Government Buildings, Suva, Fiji Fax: +(679) 330 4864 Phone: + (679) 330 4554 E-mail: <u>info@standss.com</u> Time zone: GMT +12

QuickFile for Outlook Technical Support:

E-mail: support@standss.com Web Site: www.standss.com

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