

Save Time. Work Smarter. Sell More.

# DocAdmin™ for Act!

Scan and attach documents right from within Act!

Are your important client documents in a pile on your desk or stuck in a file where you can't get to them instantly?

Does your scanner sit idle because it takes too much effort to scan documents into the computer and organize them for instant retrieval?

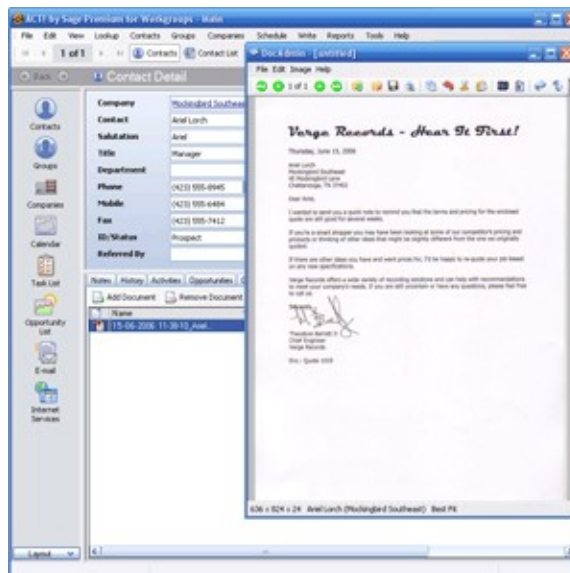
Is your office still overwhelmed with paper even though you use ACT! for all your names, phone numbers, and electronic documents?

DocAdmin for Act! is the perfect tool to keep you organized with the touch of your finger. Simply place any document in your scanner, hit the scanner icon in ACT!, and your document is scanned and attached to that contact in ACT!

## KEY FEATURES:

- ◆ Automatically attach documents to contacts for instant access and perfect organization.
- ◆ Scan and attach documents right from within ACT!
- ◆ Easily print and share documents in standard PDF format.
- ◆ Works with TWAIN or WIA compliant scanners.

If you have client paperwork crowding your desk and file cabinets, DocAdmin for Act! will help you get organized so you can focus on your important client relationships and growing your business!



DocAdmin is the ideal solution for any Act! user whose business requires hardcopy documentation, including:

- ◆ Financial Planners and Brokers
- ◆ Real Estate Agents
- ◆ Mobile Salespeople
- ◆ Legal Professionals
- ◆ Small Business Owners
- ◆ Insurance Agents
- ◆ Recruiters
- ◆ Accountants
- ◆ Executive Assistants
- ◆ Telecommuters



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Filing client hardcopy paperwork in ACT! has never been easier!



## EASILY FILE THESE AND OTHER DOCUMENT TYPES:

- ◆ Signed contracts
- ◆ Meeting handouts
- ◆ Printed pictures
- ◆ Marketing collateral
- ◆ Filled-in forms
- ◆ Check and receipt copies
- ◆ Resumes
- ◆ Magazine articles
- ◆ Letters
- ◆ Handwritten notes
- ◆ Signed approvals
- ◆ Incoming correspondence

## FEATURE DETAILS

- ◆ Launches directly from ACT! using a button on your Act! toolbar.
- ◆ Takes the current paper in the scanner and attaches it to the current contact with automatic document naming.
- ◆ Save as standard PDF document so all users can open, print, or email the attached documents.
- ◆ Create unique document names automatically from current contact and current time, saving you typing.
- ◆ Option to prompt the user for a document subject, title, and author to easily create your own useful document names.
- ◆ Manipulate scanned pictures or images—print, save, crop, rotate, scale image to 'fit to view' or view actual size, fit document to page when printing.
- ◆ Easy to learn and easy to use.

## SYSTEM REQUIREMENTS

- ◆ Act! v18 or higher
- ◆ Compatible with TWAIN or WIA compliant scanners



KEYSTROKE, 500 Gordon Baker Rd, Toronto, Ontario, M2H 3B4, CANADA  
Toll Free: 800-857-0558 Email: kqc@keystroke.ca

## CUSTOMER TESTIMONIALS

"As a business owner, I have to tell you this tool is so easy to use and really helps organize every aspect of our business. We no longer have to worry about digging through piles of paper to find something; now everyone has access to whatever they need stored electronically right in our Act! database! It truly is a great product!

- James Davis, Mount Laurel NJ

## OTHER GREAT ACT! ADD-ONS FROM KEYSTROKE

AutoAdmin - Award-winning unattended backup and maintenance of unlimited Act! databases!

AutoLimited Access - Automatically and accurately control limited access at the point of data entry!

FaxAdmin - Fax directly out of Act!

MergeAdmin - Update Act! data from external ASCII files on a field by field level!

MigrateAdmin - Convert Goldmine® data to Act! without leaving valuable information behind!

## AWARDS AND CERTIFICATIONS

- ◆ AutoAdmin is the winner of the "Act! Vision Award" for best Add-on
- ◆ Act! Software Development Partner (ADP)
- ◆ #1 Act! Reseller in the World
- ◆ Diamond Act! Certified Consultant (ACC)
- ◆ Microsoft Certified Solution Developer

