



Mail Manager integration with

OPENTREE

Mail Manager recognises the importance of fitting into the lifecycle of the document management solution that Opentree provides. Mail Manager has made setting up the Opentree integration simple with the use of discovery of filing locations. Users can set it up by navigating to the User Preferences from the Mail Manager ribbon and selecting the 'OpenTree (preview)' option. Users enter the name of the destination folder for discovery, for example 'Email', and enable filing to and searching those locations.

Benefits

1. Clients using Opentree as a document management system designed and configured to assist with strict document control can now extend this success and time saving with the Mail Manager Integration.
2. Mail Manager integrates seamlessly with the OpenTree workflow so that users are prompted to file emails to locations of existing projects.
3. Searching for specific emails on projects is simple with the functionality of Mail Manager Search
4. Mail Manager also mirrors permissions of the users which means that only those email folders that the user is allowed to file to and search within are visible to them.

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