



# Word Add-In

Integrate Content Manager into Microsoft Word



# Word Add-In

Work smarter. Streamline your documents.

Kapish Word Add-In allows users to insert Content Manager (CM) Properties directly into new and existing Microsoft Word Documents. It takes the metadata details in real-time and allows the user to place those details in the body, header and footer of the document.

Kapish Word Add-In template building capabilities give corporate templates a professional and accurate representation of the information stored on the records. By using the metadata stored against the record to populate the information in the document.

## Key Features

- One-click to insert the Content Manager Record Number into documents
- Insert CM Properties (metadata) anywhere in new and existing documents
- Set User Favourite fields for quick insertion
- Create dynamic templates containing CM metadata
- Reply to existing CM correspondence with Kapish Word Add-In templates
- Mail Merge (either letter or email) and save records to CM
- Select Mail Merge recipients from Excel, CM or other systems
- Create links to Excel Workbooks saved in CM
- Finalise CM Records from within Microsoft® Word
- Insert CM Location's Signature image files into documents
- Modify CM Record Properties within Microsoft® Word
- Incorporate CM Properties into Mail Merge documents and save Mail Merge documents as individual Records in CM

## Specs

### Operating System Requirements

- Records Manager 8.1 or later (including Content Manager 9.x) installed on the PC
- Microsoft® Office 2010, 2013 or 2016
- Windows® 7, 8 or 10 (32-bit or 64-bit)
- Microsoft® .NET Framework 4.5.2 or later
- The minimum requirements set by your current version of Records Manager / Content Manager

### Information for IT Department

Kapish Word Add-In is a client-side application that works in conjunction with Microsoft® Word and Content Manager (CM) to improve the user experience by inserting CM record details into Microsoft® Word documents. Software installation is via a Microsoft® Installer (MSI) file, this can be run manually on each PC or via common network installation methods (e.g. SCCM, ZENworks, Group Policy etc.).

**Talk to us today to find out how our suite of products and services  
can help you get the most out of Content Manager**

**Kapish**

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