



Virtual Office News

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Reprint

Attach Plus

By David J. Drucker

Last month, in my article on encryption, I mentioned an easy way of doing it, which is to simply password-protect PDF documents you create and attach to emails you send clients or other recipients requiring confidentiality. I sort of made light of this since formal encryption software, like Pretty Good Privacy, is a more sophisticated way of protecting communications, not to mention it can be applied in a wider variety of scenarios.

However, many of us will use neither encryption nor password-protected PDFs. Why? Because encryption has a learning curve and password-protecting PDFs, while not complicated, requires a series of steps that some advisors find too time-consuming to bother with. Until now. Or perhaps I should say, until Kevin and Jo Day of Trumpet, Inc. developed an inexpensive (\$49.95), simple, but extremely useful product they call Attach Plus.

It's been around awhile, and we're just getting around to reviewing it now. Why the wait? A combination of inertia and (here's a cool rationalization) because the product is more feature-rich now than when the Days first released it. So let's get into its use, its features and its convenience and, I'm willing to bet, it might just become your first defense on the encryption scene by the time we're done.

The Days no longer take sole responsibility for Attach Plus. Kevin Basso is the development manager for the product and he took me through a tour of it. My main question to him was, "How long will it take me to learn this?" (In fact, this is my main question regarding any new software product these days as time is my most precious commodity — I'm sure you can relate). I really liked Kevin's answer. He said, "About ten minutes."

Attach Plus is an add-on-type program that works with functions already found in Microsoft's Office suite. In fact, when you click on Start-Programs-Attach Plus, Windows is likely to tell you that Attach Plus is already running. That's because it's a behind-the-scenes software. If you see its yellow paperclip icon in your taskbar, then you know it's enabled. You'll also see evidence of this when you click on File-Print or any number of other Windows menu functions since, once it's installed, Attach Plus shows up as a Print option.

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Another place you'll use it is in conjunction with the File-Send To-Mail Recipient option found in Word, Excel and other Office programs. If you use File-Send To-Mail Recipient already, you know that by clicking on that within, say, an open spreadsheet, your email software will be launched and a copy of the spreadsheet attached.

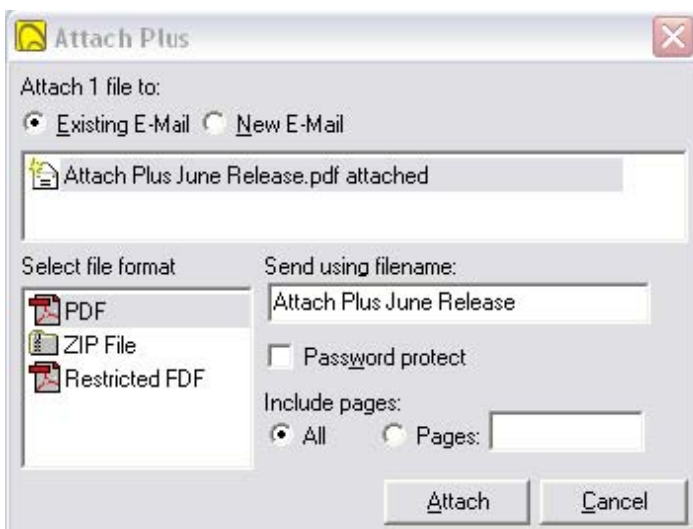
Before even reading the brief Help file that comes with Attach Plus or viewing either of the two quick-start video tours, I just tried to use the program. (Don't frustrate me on my first attempt, software developers; my confidence in your product immediately drops 50% when that happens). I wasn't disappointed. From within Adobe where I was viewing the draft of a future press release Basso sent me, I clicked on File-Send Mail and up popped Attach Plus' little dialog box. I selected the "radio box" called "new e-mail," I selected the PDF file format from among several choices, I defaulted to the filename that was offered ("Attach Plus June Release"), I left "include pages" set to its default of "all," and I then checked the box entitled "password protect."

Doing so popped up another box entitled "Set Encryption Password." I typed in a password in the area titled "recipient password" and typed it again at "confirm recipient password." I was sent back to the first dialog box where I clicked "Attach."

Next I was shown the usual Outlook Express (which I indicated to be my email software of choice) "New Message" window with the document attached. All it needed was for me to indicate the recipient's email address and then click "Send." Attach Plus works with Groupwise 6.0 and 6.5, ACT! e-mail 6.0, Outlook 2000, Outlook XP, Outlook 2003, Outlook Express 6, Goldmine e-mail 5,

Not only is Attach Plus PGP but it's PDS (pretty darn simple), as well. I think Basso overestimated the learning curve by a few minutes. Seriously, if you take the time to read the Help file, as I did next, you probably will spend a full ten minutes learning this program. Let's see what the Help file can teach us.

I learned, to name just a few things:

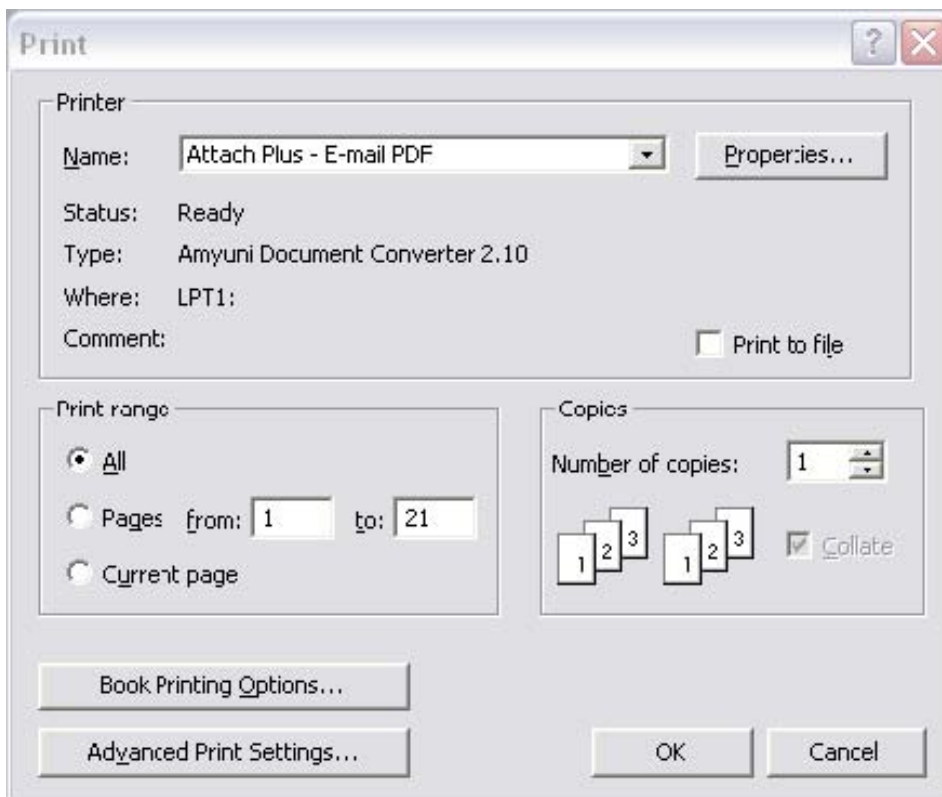




So how do you get set up? That's pretty darn simple too. It's mainly a matter of telling Attach Plus what email client you want it to work with. During the installation process, you're asked to select your default email program and a drop-down menu appears showing all the possible systems on your computer. For example, if you send and receive email via Goldmine which is your CRM, but you also have Outlook Express and MS Outlook installed on your system, all three possibilities will appear in the drop-down menu.

How about sending that PDF? In my earlier example, I attached an existing PDF to an email, but suppose the document you want to send is not yet in PDF mode? Let's say it's a Word document. You would click File-Print from within Word and then select either "Attach Plus—E-mail PDF" or "Attach Plus—Save & E-mail PDF."

Selecting the latter (because I want to save in my client's folder a copy of what I've sent him), the Save As window appears, allow-



ing me to select a directory and filename. Then the Attach Plus dialogue box described earlier pops up allowing me to password-protect and send the Word document, now converted into a PDF.

If you work in a large office and send lots of intra-office email with attachments, Attach Plus will give you a big productivity gain from its shortcut feature that pro-

vides links in lieu of a whole document. You can send a shortcut to a PDF or other document that's already saved to a folder on your company's network. Since your intra-office recipient already has assigned rights to the folder (which another employee might not have rights to), the password feature isn't really necessary and Attach Plus makes accessing the document quick and easy.

The way most of us will use Attach Plus, though, is with our clients. You will need to assign each client a password in advance and that password will be used to secure all PDFs sent to the client thereafter. (Generally, you'll want to share those passwords in a client meeting or on the phone rather than by email).

You can also set a "Sender Password." With a Sender Password, you can open a document for a client if they've forgotten their password and you're some place without a handy record of it.

As mentioned, you can own Attach Plus for a very reasonable \$49.99. Once the number of users in one location rises above 24, the price drops rapidly:

24, \$49.99
25 - 99, \$39.99
100 - 499, \$29.99
500 - 999, \$24.99

Bottom line? With Attach Plus, you contact attach and password-protect a PDF document to an email in six clicks vs. the 17 clicks it takes if you do the same thing using Adobe® Acrobat. Do you need to own Adobe® Acrobat to use Attach Plus? No, Attach Plus comes with a built-in PDF print driver that enables you to convert documents to PDF without having to purchase the full version of Adobe® Acrobat.