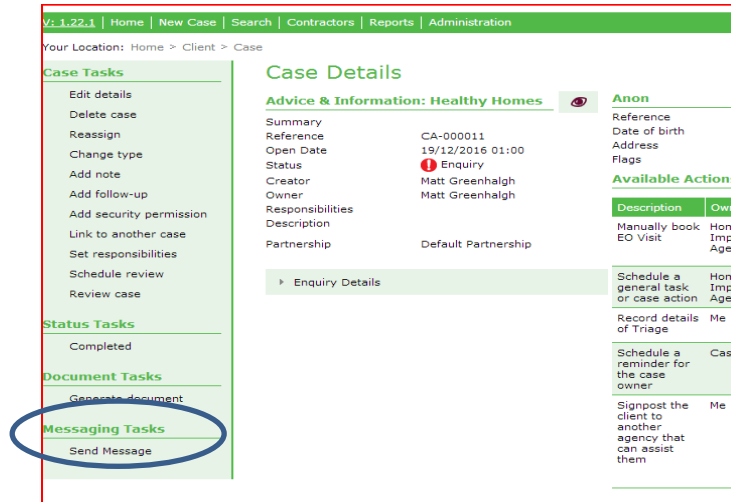




Step by Step guide on how to Generate Documents in the system

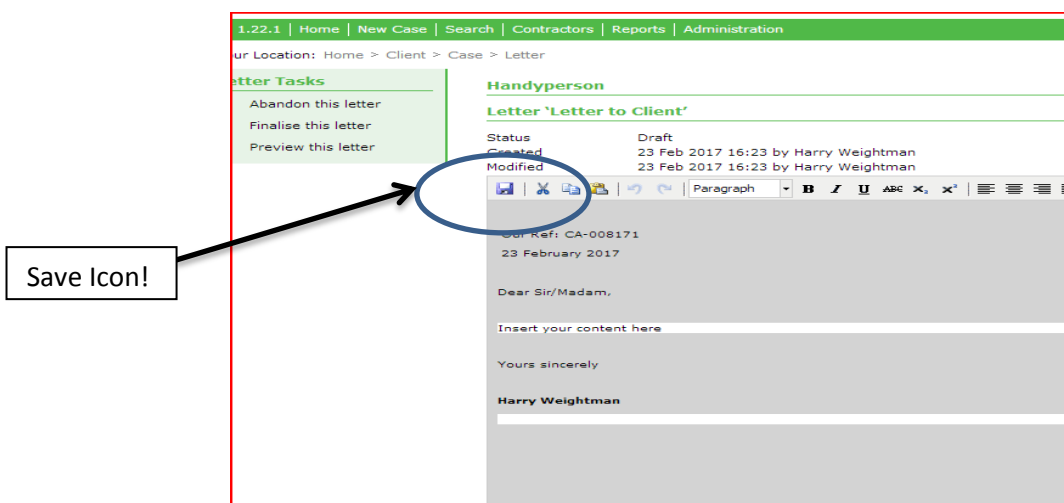
1. When on the case screen you can see on the left hand side there is a sub-heading entitled 'document tasks'. Click Generate document underneath this. (Figure 1)



2. You will see there are a number of standard letters already in here which we can look into adding more if you send us example letters. Click on the letter you need to generate and it will bring up a box which you can edit the content as you want.

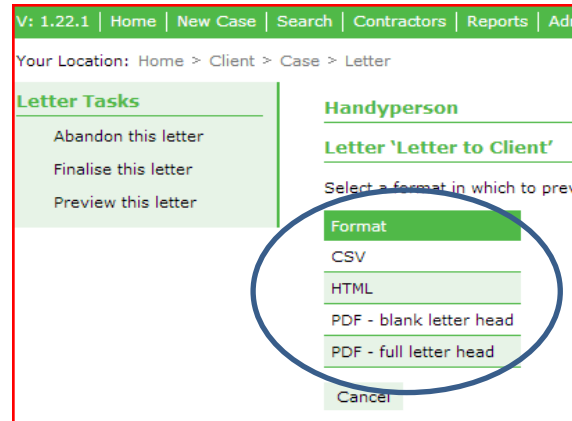


3. After you click the letter you need, it will bring up a box which you can edit the content as you want. After you have entered all the detail in the letter don't forget to **click the save icon**, otherwise none of the information will save and it will just revert back to the original.

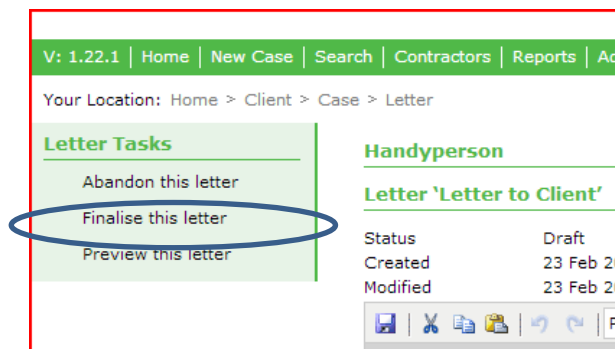




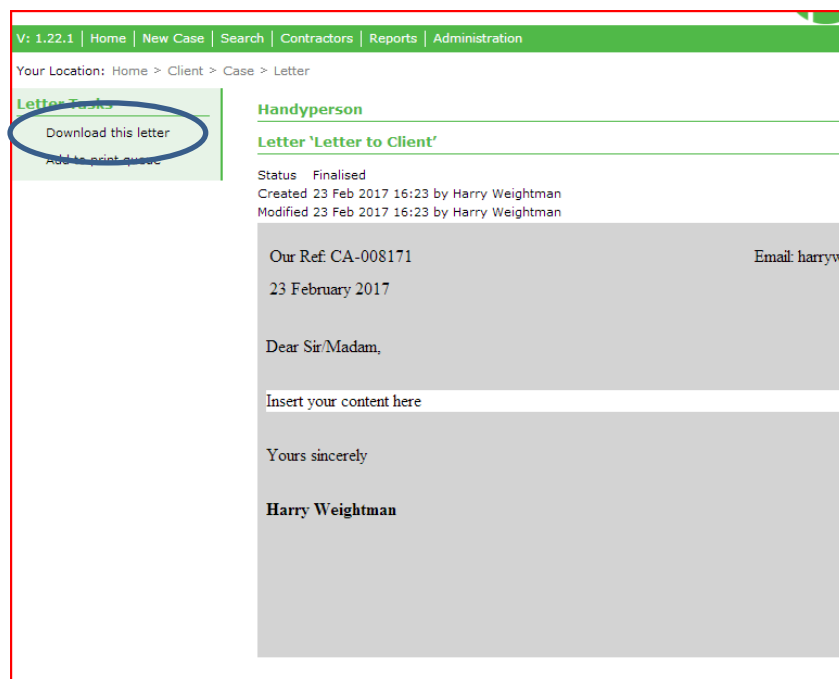
4. You will see that you can then preview the letter to check it looks like it should. You will see that you can preview it in CSV, HTML, PDF for blank paper and PDF for letterhead paper. If you already have your letterhead saved somewhere or you print on letterhead paper then chose 'PDF for letterhead paper'.



5. Once you have checked it looks as it should **you** can click 'Finalise this letter' in the top left of the screen. When you finalise the letter you cannot edit again so double check it is correct before doing so.



6. Once again it will show you a box with the content you put in and will also have an option to download the letter and print it once it opens in the new tab.





- When you download the letter it will appear in a small box at the bottom right hand corner of the screen. Upon clicking it, it will take you to a new tab with your letter on it. You can print this using the print button in the top right hand corner of the screen.

V: 1.22.1 | Home | New Case | Search | Contractors | Reports | Administration

Your Location: Home > Client > Case > Letter

Letter Tasks

Download this letter
Add to print queue

Handyperson

Letter 'Letter to Client'

Select a format in which to download this letter:

Format

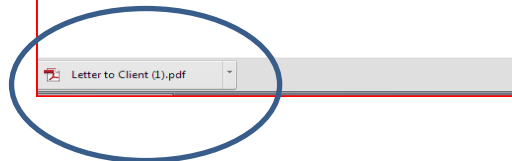
CSV

HTML

PDF - blank letter head

PDF - full letter head

Cancel



Print and download buttons

Letter to Client (1).pdf 1 / 1

Print and download buttons

Email: harryw@foundations.uk.com

Our Ref: CA-008171

23 February 2017

Dear Sir/Madam,

Insert your content here

Yours sincerely

Harry Weightman



HIA CASE MANAGER

Real time case management software
for your housing support needs



Foundations

THE NATIONAL BODY FOR
HOME IMPROVEMENT AGENCIES

8. You can then navigate back to the case and look at the bottom of the screen. You will see a sub-heading entitled 'letters'; click that and you will be able to see all letters on this case. If you click into one it will give you the option to download it again.



V: 1.22.1 | Home | New Case | Search | Contractors | Reports | Administration

Harry Weightman | Sign

Your Location: Home > Client > Case

Case Tasks

- Edit details
- Delete case
- Reassign
- Change type
- Add note
- Add follow-up
- Add security permission
- Link to another case
- Set responsibilities
- Schedule review
- Review case

Status Tasks

- Advice Given
- Initial Contact

Document Tasks

- Generate document

Work Tasks

- Change award type
- Set quote
- Add fee
- Add funding
- Add addition
- Add omission
- Cancel work
- Add new work to project

Case Details

Handyperson: Handyperson

Summary

Reference: CA-008171
Open Date: 23/02/2017 16:23
Status: ! Enquiry
Creator: Harry Weightman
Owner: Harry Weightman
Responsibilities: Description
Partnership: East Devon

Referral

Work Details

Work

Status: Active
Contractor: Not yet awarded
Work Cost: 0.00 (net) + 0.00 (VAT) = 0.00 (gross)
Agreed Additions: 0.00 (net) + 0.00 (VAT) = 0.00 (gross)
Agreed Omissions: 0.00 (net) + 0.00 (VAT) = 0.00 (gross)
Agreed Fees: 0.00 (net) + 0.00 (VAT) = 0.00 (gross)
Total Cost: 0.00 (net) + 0.00 (VAT) = 0.00 (gross)
Agreed Funding: 0.00 (net) + 0.00 (VAT) = 0.00 (gross)
Funding Balance: 0.00 (net) + 0.00 (VAT) = 0.00 (gross)
Total Payments: 0.00 (net) + 0.00 (VAT) = 0.00 (gross)
Payment Balance: 0.00 (net) + 0.00 (VAT) = 0.00 (gross)

Available Actions

Description	Owner	Details	Actions
Schedule a general task or case action	DCH Housing Support	General Task	Add
Schedule a reminder for the case owner	Case owner	Reminder	Add
Signpost the client to another agency that can assist them	Me	Signpost to other agency Identify agency and give the appropriate contact details	Add

Case Actions | Case Reviews | Correspondence | Quotes | Fees | Funding | Variations | Project | **Letters**

Payment Balance

0.00 (net) + 0.00 (VAT) =
0.00 (gross)

Case Actions | Case Reviews | Correspondence | Quotes | Fees | Funding | Variations | Project | **Letters**

Linked Cases | Security

Letter	Date	Author	Status
Letter to Client	23/02/2017 16:23	Harry Weightman	Finalised
Letter to Client About a Case	23/02/2017 16:23	Harry Weightman	Draft
Letter to Awarded Contractor About Work	23/02/2017 16:23	Harry Weightman	Draft