HIA CASE MANAGER
Real time case management software
for your housing support needs

Foundations
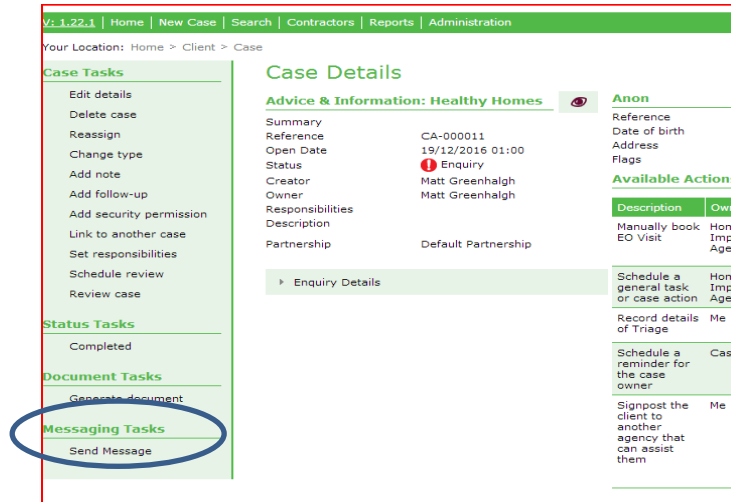THE NATIONAL BODY FOR
HOME IMPROVEMENT AGENCIES

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.

Save Icon!
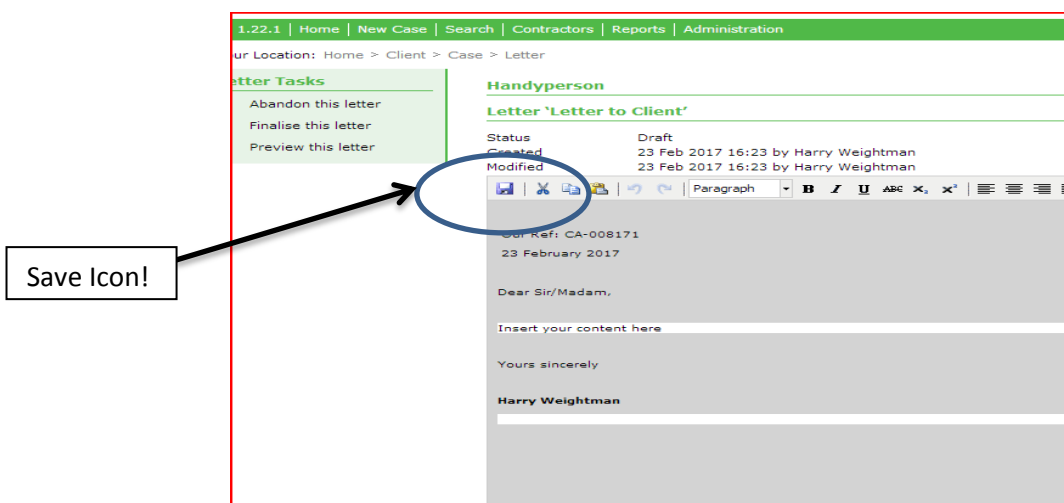
4. You will see that you can then preview the letter to check it looks like it should. You will see that you can preview it in CSV, HTML, PDF for blank paper and PDF for letterhead paper. If you already have your letterhead saved somewhere or you print on letterhead paper then chose 'PDF for letterhead paper'.
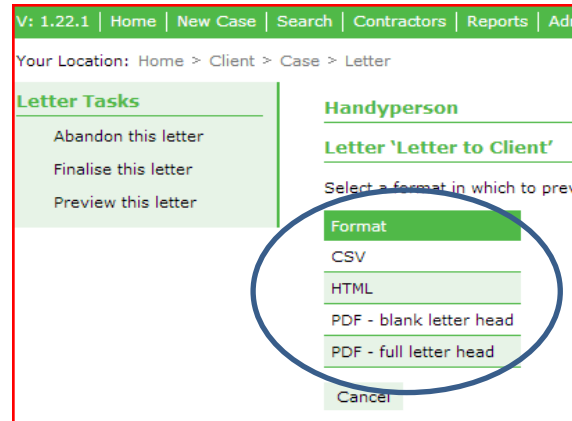
5. Once you have checked it looks as it should **you** can click 'Finalise this letter' in the top left of the screen. When you finalise the letter you cannot edit again so double check it is correct before doing so.
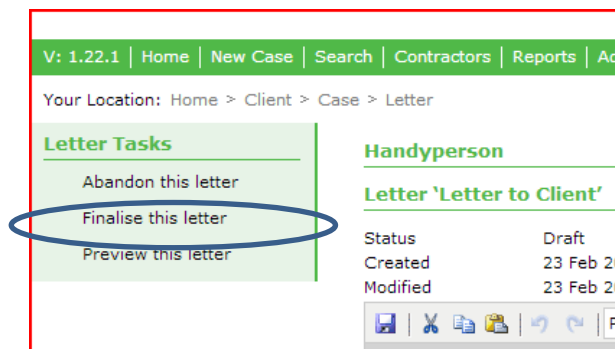
6. Once again it will show you a box with the content you put in and will also have an option to download the letter and print it once it opens in the new tab.
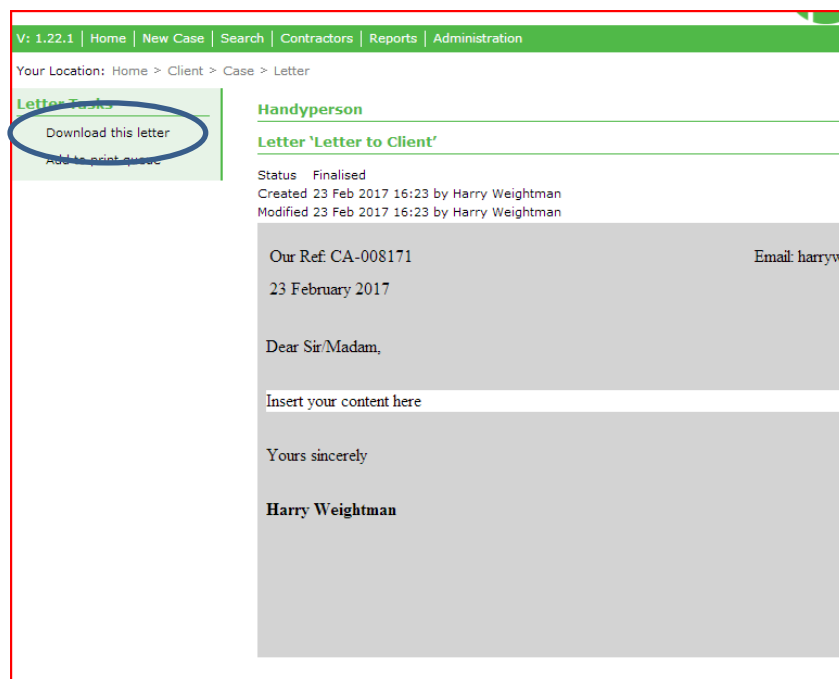
7. When you download the letter it will appear in a small box at the bottom right hand corner of the screen. Upon clicking it, it will take you to a new tab with your letter on it. You can print this using the print button in the top right hand corner of the screen.
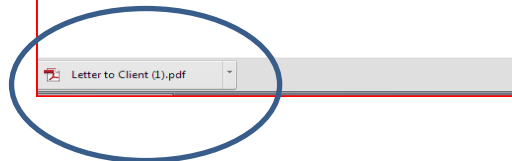
Print and download buttons

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.

Click case to go back to case