



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)

Case Tasks	Case Detai	s			
Edit details	Advice & Informa	ation: Healthy Homes	۲	Anon	
Delete case Reassign Change type Add note Add follow-up	Summary Reference Open Date Status Creator Owner	CA-000011 19/12/2016 01:00 Enquiry Matt Greenhalgh Matt Greenhalgh		Reference Date of birth Address Flags Available Ac t	tio
Add security permission Link to another case Set responsibilities	Responsibilities Description Partnership	Default Partnership		Description Manually book EO Visit	Ov Ho Im Ag
Schedule review Review case	▹ Enquiry Details			Schedule a general task or case action	Ho Im Ag
Status Tasks				Record details of Triage	Me
Completed				Schedule a reminder for the case owner	Ca
Generate document Messaging Tasks Send Message				Signpost the client to another agency that can assist them	Me

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.

V: 1.22.1 Home New Case \$	Search Contractors Reports Administration						
Your Location: Home > Client > Case							
Case Tasks Delete case Add note Add follow-up Add security permission Link to another case	Generate Document Disabled Facilities Grant/Housing Options Select the letter you would like to generate: Letter Client Work Approval Notification Letter to Awarded Contractor About Work						
Generate document	Letter to Client Letter to Client About a Case						
	Letter to Client About Work Letter to Unspecified Recipient Concerning Client Unable to Contact by Telephone Works Order						

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.

	1.22.1 Home New Case 3	Search Contractors Reports Administration
	ur Location: Home > Client >	Case > Letter
	etter Tasks	Handyperson
	Abandon this letter	Letter 'Letter to Client'
	Finalise this letter Preview this letter	Status Draft Created 23 Feb 2017 16:23 by Harry Weightman Modified 23 Feb 2017 16:23 by Harry Weightman
	X	🛃 🗶 🝙 🏝 🤭 (** Paragraph 🔹 B 🖌 🗓 🗛 🛠 🗴 🛪 * 🏣 🚍 🚍
Save Icon!		our Ref: CA-008171 23 February 2017 Dear Sir/Madam, Insert your content here
		Yours sincerely
		Harry Weightman
	1	





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'.

V: 1.22.1 Home New Case Search Contractors Reports Ad	our Location: H
Your Location: Home > Client > Case > Letter	etter Tasks
Letter Tasks Handyperson	Abandon th Finalise this
Abandon this letter Letter 'Letter to Client'	Preview thi
Finalise this letter Status Draft Preview this letter Created 23 Feb 20	
Modified 23 Feb 20	
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Your Location: Home > Client >	Case > Letter
Letter Tasks	Handyperson
Abandon this letter	Letter 'Letter to Client'
Finalise this letter	Select a format in which to pr
Preview this letter	Format
	CSV
(HTML
	PDF - blank letter head
	PDF - full letter head
	Cancer

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.

V: 1.22.1 Home New Case	Searc	h Contra	actors R	eports Adı				
Your Location: Home > Client > Case > Letter								
Letter Tasks		Handyp	erson					
Abandon this letter		Letter 'I	Client'					
Finalise this letter	>	Status		Draft				
Preview this letter		Created		23 Feb 20				
		Modified		23 Feb 20				
		🛃 X	🗈 🚨	") (° Pa				

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.

V: 1.22.1 Home New Case 5	Gearch Contractors Reports Administration	
Your Location: Home > Client > 0	Case > Letter	
etter Tasks	Handyperson	
Download this letter	Letter 'Letter to Client'	
Add	Status Finalised	
	Created 23 Feb 2017 16:23 by Harry Weightman Modified 23 Feb 2017 16:23 by Harry Weightman	
	Our Ref. CA-008171	Email: harry
	23 February 2017	,
	Dear Sir/Madam,	
	Insert your content here	
	insert your content nere	
	Yours sincerely	
	Harry Weightman	





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.

	e Search Contractors Reports Administration	
Your Location: Home > Clier	tt > Case > Letter	
Download this letter	Letter 'Letter to Client'	
Add to print queue	Select a format in which to download this letter Format CSV HTML	
	PDF - blank letter head PDF - full letter head Cancel	
Letter to Client (1).pdf		Print and download buttons
Letter to Client (1).pdf	1/1	° ± =
	Email: harryw@foundations.uk	.com
Our Ref: CA-008171		
23 February 2017		
Dear Sir/Madam,		
Insert your content here		
Yours sincerely		
Harry Weightman		





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.

	uk			[Click case t	o go back	
V: 1.22.1	l Home Ne	w Case S	Search C	Contractors			
Your Loca	ation: <u>Home</u> >	Case > Le	etter				
Letter	Tasks		Han	dyperso)r		
/: 1.22.1 Home New Case Searc	ch Contractors Repo	orts Administratio	on			Harry Weightma	an Sign
'our Location: Home > Client > Case	2						
Case Tasks	Case Details	5					
Edit details	Handyperson: Har	ndvnerson	Ø	Anon			
Delete case		аурегзон		Reference	CL-0	06354	
Reassign	Summary Reference	CA-008171		Date of birth			
Change type	Open Date	23/02/2017 1	5:23	Address			
Add note	Status	🚺 Enquiry		Flags			
	Creator	Harry Weighti		Available Ac	tions		
Add follow-up	Owner Responsibilities	Harry Weightr	nan	Description	Owner	Details	Actions
Add security permission	Description			Schedule a	DCH Housing	General Task	
Link to another case	Partnership	East Devon		general task	Support	General Task	Add
Set responsibilities	Partnership	Last Devon		or case action			
Schedule review				Schedule a reminder for	Case owner	Reminder	Add
Review case	 Referral 			the case			
	▹ Work Details			owner			
atus Tasks				Signpost the client to	Me	Signpost to other agency	Add
Advice Given	Work			another		Identify	
	Status	Active		- agency that can assist		agency and give the	
Initial Contact	Contractor	Not yet award		them		appropriate	
			J.UO (VAT) =			contact details	
	Work Cost	0.00 (net) + (0.00 (gross)					
	Work Cost Agreed Additions	0.00 (gross) 0.00 (net) + 0.00 (gross)	0.00 (VAT) =				
ocument Tasks		0.00 (gross) 0.00 (net) + 0.00 (gross) 0.00 (net) +	0.00 (VAT) =				
Generate document	Agreed Additions	0.00 (gross) 0.00 (net) + 0.00 (gross)	0.00 (VAT) = 0.00 (VAT) =				
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Cument Tasks Generate document ork Tasks Change award type Set quote Add fee Add funding Add addition	Agreed Additions Agreed Omissions Agreed Fees Total Cost Agreed Funding Funding Balance	0.00 (gross) 0.00 (net) + 1 0.00 (net) + 1 0.00 (net) + 1 0.00 (gross) 0.00 (gr	<pre>(VAT) = (VAV) 00.0 (VAT) = (VAV) 00.0 (VAT) = (VAV) 00.0 (VAT) = (VAV) 00.0 (VAT) = (VAV) 00.0</pre>				
Comment Tasks Generate document ork Tasks Change award type Set quote Add fee Add funding Add addition Add omission	Agreed Additions Agreed Omissions Agreed Fees Total Cost Agreed Funding Funding Balance Total Payments	0.00 (gross) 0.00 (net) + + 0.00 (gross)	<pre>(TAV) 00.0 (TAV) = (TAV) 00.0 (TAV) = (TAV) 00.0 (TAV) = (TAV) 00.0 (TAV) = (TAV) 00.0</pre>				
Comment Tasks Generate document Ork Tasks Change award type Set quote Add fee Add funding Add addition	Agreed Additions Agreed Omissions Agreed Fees Total Cost Agreed Funding Funding Balance	0.00 (gross) 0.00 (net) + 1 0.00 (net) + 1 0.00 (net) + 1 0.00 (gross) 0.00 (gr	<pre>(TAV) 00.0 (TAV) = (TAV) 00.0 (TAV) = (TAV) 00.0 (TAV) = (TAV) 00.0 (TAV) = (TAV) 00.0</pre>				

_		0.00	(net) + 0.00 (VAT)	-					
	Payment Balanc		(gross)						
	Case Actions	Case Reviews	Correspondence	Quotes	Fees	Funding	Variations	Project	Letters
	Linked Cases	Security							
	Letter				Date		Author	St	atus
1	Letter to Client			23/02/2017		Harry	Fin	alised	
				16:23 W		Weightman			
	Letter to Client About a Case				23/02/2	017	Harry	Dr	aft
				16:23		3 Weightman			
	Letter to Award	led Contractor Al	bout Work		23/02/2017		017 Harry		aft
					16:23		Weightman		