

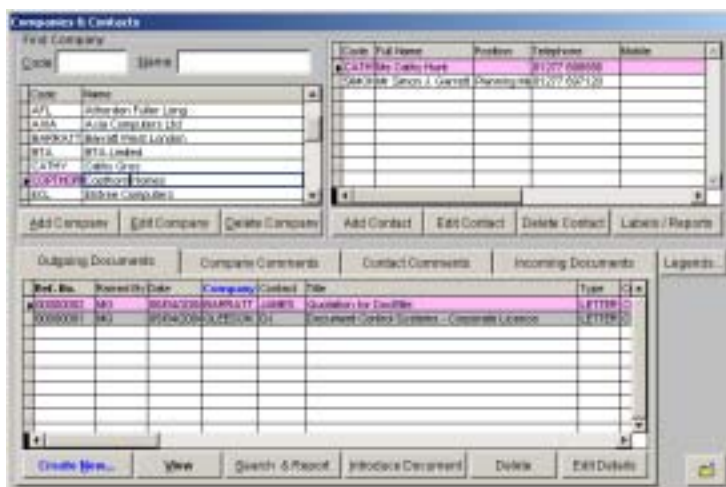
Introducing Documents to InTouchPro

If you have created documents outside of InTouchPro, you can still include them in the systems – for others to see.

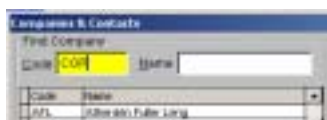
To do this you must first click on the ‘Companies, Contacts and Correspondence’ button on the main menu.



InTouchPro will present a form like the one below, and the first thing you should do is locate the company or organisation to whom you addressed your new document.



You can locate the company by either scrolling down the list in the top-left grid, or by typing either the short code in the Code box, or the beginning of the name in the Name box:



With the company of interest selected, InTouchPro will present a list of contacts in the top-right grid. You can click on the contact of interest, InTouchPro will then use it as the selected contact as you create your new document.

If the company or organisation is not listed, follow the instructions in the documentation chapter ‘Creating Companies & Contacts’.

Having selected a company of interest, you should click on the 'Introduce Document' button on the 'Outgoing Documents' tab – InTouchPro will present a form like the one below:

Company	Contact	Document Type
N.L.	CAWST	Castry Mh
	EASTDORR	EASTDORRHE
	GAULT	Mr Gault Peter
	GALT	Mr James Galtwood
	JAMES	Mr John Habstead
	JO-81	

Originator: ADMIN Date Raised: 14/06/2004 Category: CORR

Title/Subject: _____

Their Ref: _____

Keywords: _____

Address: _____

Comments/Notes: _____

Location of File: C:\BNC\BNC82

File Name: _____

Enquiry No: _____

Job No: _____

Introduce...

InTouchPro will have completed the company of interest – based on the one you were positioned on – and highlighted the contact you selected. You should now click on the type of document you want to introduce – from the list to the right.

Document Type
FAX
H&S LETT
LETTER

The Originator will default to your own User ID, but if you are introducing a document on someone else's behalf – (such as an assistant typing a letter for a manager) you should change the Originator to be that person's User ID.

Next you should check the Date Raised, this will default to the current date, but you can change it to another one if required.

The next thing to consider is the document category – which controls where the document will be filed – this is sometimes linked to the document type by default, otherwise you will need to select a category from the drop down list.

You must complete the Title/Subject and at least one keyword (which can be used for searching later).

Title/Subject: Confirmation Assessment

Their Ref: _____

Keywords: ADDRESS CONFIRM

You can optionally complete the 'Their Ref.' box with a reference to any incoming document to which you may be a response.

The last thing InTouchPro needs to know is where to find the document your are introducing.

By default InTouchPro expects to look in your local **C:** drive in a folder called **\$incoming**.



To look for the file, simply click on the button with three dots, to the right of the File Name box.



InTouchPro will present you with a 'File Open' dialog box, like the one above and all you need to do is double click on the document file you want to introduce. InTouchPro will return you to the 'Introduce Correspondence' form and will have completed the file name and type with the details from the file you selected.

All that remains is for you to click on the 'Introduce...' button, InTouchPro will validate the entries you made and then will move the document into the right place in the filing system.