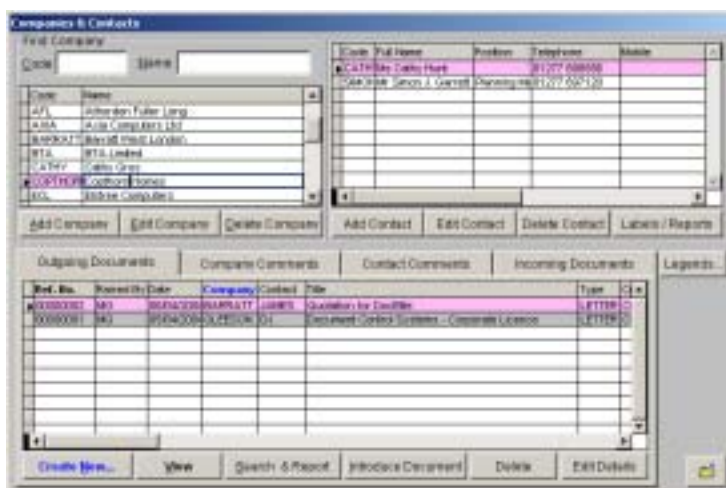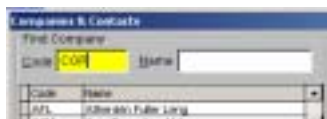# Creating New Documents in InTouchPro

To create new documents in InTouchPro, 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 are addressing 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 'Create New…' button on the 'Outgoing Documents' tab – InTouchPro will present a form like the one below:
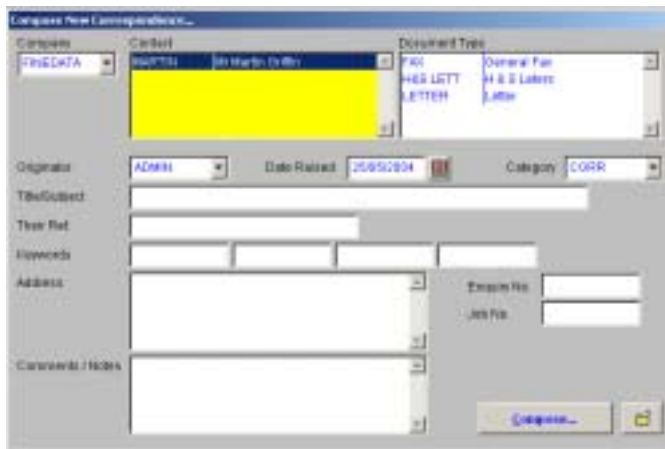
InTouchPro will have completed the company of interest – based on the one you were positioned on – and highlighted the contact you selected. You should now click on the type of document you want to create – from the list to the right.
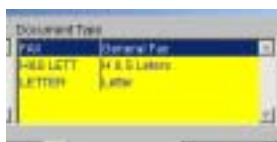
The Originator will default to your own User ID, but if you are creating a document on someone elses behalf – (such as an assistant typing a letter for a manager) you should change the Originator to be that persons User ID.

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).

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

When you are ready, click on the 'Compose…' button.

InTouchPro will copy the template file for the document type you have selected, then open it using Microsoft Word – replacing any of the labels in the template file with information from InTouchPro (the names, address, subject line and so forth). With the document open, all you need to do is type in the text that you need.

When you have finished entering your own text, simply save the document – it will already be in the right place and have the right name – and exit from Microsoft Word.