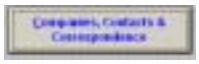
Registering Incoming Documents

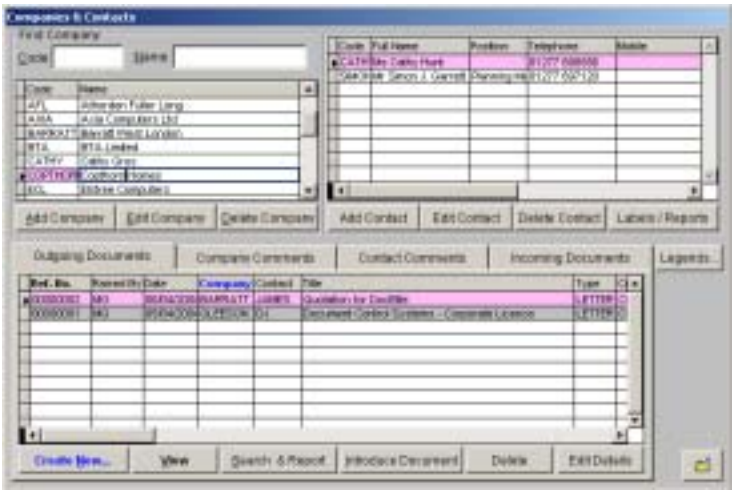
If you have received documents from third parties (incoming mail) you can include them in InTouchPro by registering them.

To do this you must first make the document available in an electronic form – either by scanning it or saving it (if it an e-mail attachment). The best place to save the file is to your local drive **C:** in a folder called **$incoming** (which InTouchPro will have created for you).

Having done this you must then 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 from whom you received 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'.

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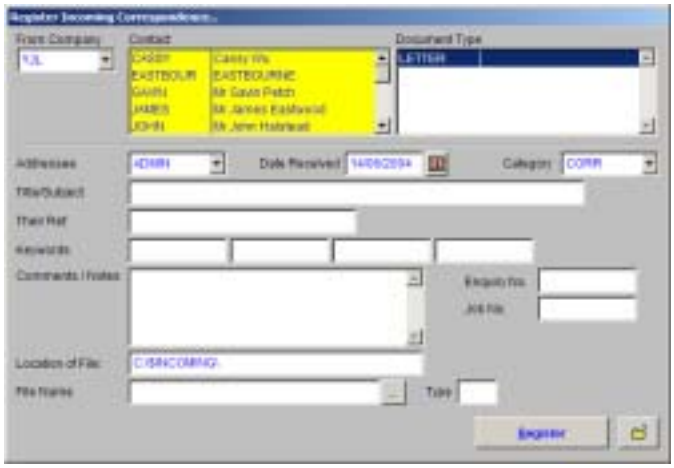
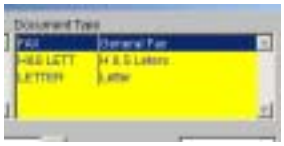
Having selected a company of interest, you should click on the ‘Register…’ button on the ‘Incoming Documents’ tab – InTouchPro will present a form like the one below:



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 register – from the list to the right.



The Addressee will default to your own User ID, but if you are registering a document directed to another person you should change the Addressee to be that persons User ID.

Note that if you do not assign a distribution to the document after registering it, the document will be assigned to the Addressee for deciding the distribution – so you may wish to make the Addressee the project manager or another person, rather than the name on the top of the letter.

Next you should check the Date Received, 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.

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

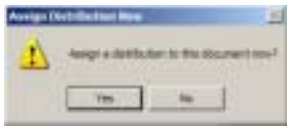
By default InTouchPro expects to look in your local **C:** drive in a folder called **$incoming.**

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 register. InTouchPro will return you to the 'Register Incoming 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 'Register' button, InTouchPro will validate the entries you made and then will move the document into the right place in the filing system.

Having done so, InTouchPro will prompt you to assign a distribution to the document.



If you are deciding who should read and/or action the incoming document yourself, then you should click on the 'Yes' button. If you normally get the addressee of the document to decide on the distribution you should click on the 'No' button.

For details on assigning a distribution, refer to the chapter '*Assigning Document Distribution*'.

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