

Company Documents - Manual Email Notifications

NOTE: The fields displayed on the screen may vary from the illustrations below based on an individual user's security rights or based on the specific configuration of the database. For any questions related to these fields, contact your system administrator. For additional definitions of fields which are not shown below, see [Online Help](#).

The system provides the ability to manually generate email notifications using the data stored in Company Document records. Common email "form letter" notifications include COI renewal letters, work authorization letters, and contract renewal letters. The email is produced using a pre-established Email Format. The Email Format uses a combination of data stored in Company Documents and fixed text. See your system administrator if the appropriate Email Format(s) are not configured in your database.

This document outlines the following topics:

- Configuring the Company Document Record for Manual Email Notifications
- Sending Manual Email Notifications for Company Document(s)
- Company Documents Reporting (Checking Configurations)

See related documents or [Online Help](#) for details related to Company Documents and to other functionality within the Company module.

CONFIGURING THE COMPANY DOCUMENT RECORD FOR EMAIL NOTIFICATIONS

1. Using the **Documents** tab within the **Company** module, enter any criteria as desired to search for Company Document records.
2. In the search results, click **DETAILS** to view the Company Document record.
3. Note that you can also access the Company Document records by searching for a Company record using the **Find Company** tab, and opening the record to display the **COMPANY DETAILS** screen. Then you would click **DETAILS** on the desired Company Document record.

[Create Company](#)
[Find Company](#)
[Documents](#)
[Run Report](#)

360 zAdmin2 at 11:56 AM

Company Name:
Search Text:

Property: Not Selected [Select](#) [Clear](#)
Region:

Document Type:
Contract Type:

Category:
Document Status:

Minority:
Woman-owned:

Expiration Date: From: To:
Preferred Vendor:

Contract Manager: Not Selected [Select](#) [Clear](#)
Active?:

Vendor:
Master Agreement?:

FIND

RESET

SEARCH RESULTS: (1)

Select a format...

[Print](#) | [Email](#) | [Excel](#) | [Auto Email Report](#) | [Add Document](#)

Document #	Company	Type	Contract Type	Status Expiration	Property
26	ABC Vendor Company	Certificate of Insurance		Approved	Star Building
Description:		COI		Expires: 10/31/2013	DETAILS
Project:		Office Reconfiguration			

[Create Company](#)
[Find Company](#)
[Documents](#)
[Run Report](#)
360 zAdmin2 at 11:18 AM

VIEW DOCUMENT DETAILS

■ Indicates a required field

COMPANY DOCUMENT DETAILS: [Company Documents](#) | [Return To Project](#) | [Edit Document](#) | [Online Document](#)

Company: ABC Vendor Company Property: Star Building

CONTACT INFORMATION:

Contact Person: Email:

Phone: Send Manual Email?: No

Mailing Address:

Alt Phone:

Send Date: Send Comments:

[Create Company](#)
[Find Company](#)
[Documents](#)
[Run Report](#)
360 zAdmin2 at 2:19 PM

Company Name: Search Text:

Property: Not Selected [Select](#) [Clear](#) Region:

Document Type: COI - Vendor Contract Type:

Category: Document Status:

Minority: All Companies Woman-owned: All Companies

Expiration Date: From: To: Preferred Vendor: All Companies

Contract Manager: Not Selected [Select](#) [Clear](#) Active?: Yes

Vendor: All Companies Master Agreement?:

SEARCH RESULTS: (2) [Print](#) | [Email](#) | [Excel](#) | [Auto Email Report](#) | [Add Document](#)

Document #	Company	Type	Contract Type	Status Expiration	Property
16	ABC Vendor Company	COI - Vendor	Service Agreement	CONT-Executed	
Description: Full Executed Expires: 10/1/2013 ■ DETAILS					
2	JG Property Management	COI - Vendor		CONT-Approved	
Description: p DETAILS					

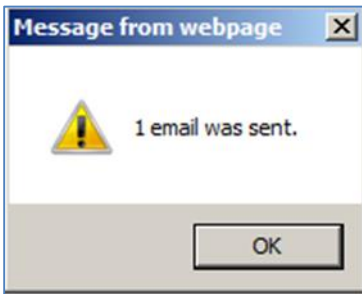
Message from webpage

Are you sure you want to send out emails?

4. From the COMPANY DOCUMENT DETAILS screen, click **Edit Document**.
5. In Edit mode, add the name of the **Contact Person** who will receive the email notification.
6. In the **Email** field, enter the email address for the Contact Person. Only one email can be entered.
7. Set the **Send Manual Email** flag to Yes.
8. Click **UPDATE** at the bottom of the screen.

SENDING MANUAL EMAIL NOTIFICATIONS FOR ONE OR MORE COMPANY DOCUMENTS

9. Using the **Documents** tab within the **Company** module, enter any criteria as desired to identify a list of Company Documents for which emails will be generated. An email will be sent for every document listed, so be sure to refine your search results so that only the appropriate documents are listed.
10. Specify a **Document Type**. This is required for this functionality.
11. Use **Select a format** to specify a specific email format.
12. Note that the Email Format must match the Document Type configured by the system administrator for that format. If it does not, the system will generate an error when you attempt to send emails.
13. Click the Email link. A dialog box will open asking you to confirm that you want to send emails. Click **OK**.
14. A dialog box will display the number of email messages sent.
15. If this number does not match the

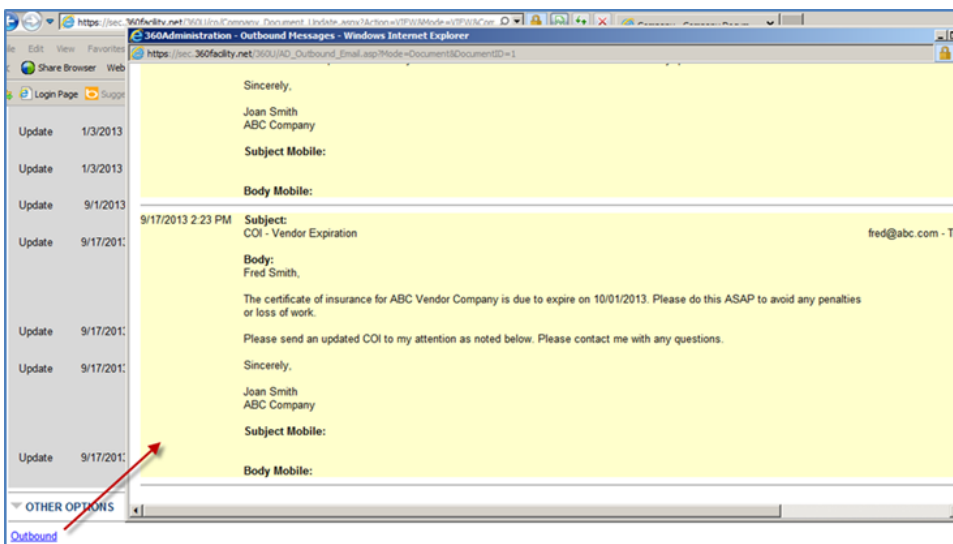


CONTACT INFORMATION:

Contact Person:	Fred Smith	Email:	fred@abc.com
Phone:		Send Manual Email?:	Yes
Mailing Address:		Alt Phone:	
Send Date:		Send Comments:	

DOCUMENT HISTORY:

Type:	Update Date:	Comments:	Status:	Cost Amount:	Updated By:
Update	10/7/2010 6:19 PM	Expiration Date has been changed from 10/31/2010 to 10/31/2009.	Fully Executed	0.00	360 zAdmin2
Update	2/23/2011 10:15 AM	Document Print Format printed	Fully Executed	0.00	360 zAdmin2
Update	2/23/2011 10:31 AM	Email sent to joan.smith@asi.com	Fully Executed	0.00	360zAdmin2



360Administration - Outbound Messages - Windows Internet Explorer

https://sec.360facility.net/360/1/ins/Forms/Document1.aspx?Action=VFP03/Mode=VFP03/Doc=

Sincerely,
Joan Smith
ABC Company

Subject Mobile:

Body Mobile:

9/17/2013 2:23 PM fred@abc.com - TC

Subject:
COI - Vendor Expiration

Body:
Fred Smith,

The certificate of insurance for ABC Vendor Company is due to expire on 10/01/2013. Please do this ASAP to avoid any penalties or loss of work.

Please send an updated COI to my attention as noted below. Please contact me with any questions.

Sincerely,
Joan Smith
ABC Company

Subject Mobile:

Body Mobile:

OTHER OPTIONS

[Outbound](#)

number of documents in the search results, then some emails were not sent because errors occurred. Usually this is a result of the document not having the Contact Person, Email address or Send Email values properly defined.

16. To identify configuration issues, run the **Company Documents Report** to review the Contact Person, Email Address and Send Manual Email configurations for each document listed (see instructions below).
17. Also, when an email is sent from the system, this will be recorded in the **DOCUMENT HISTORY** section of the COMPANY DOCUMENT DETAILS screen for an individual Company Document.
18. Additionally, from the COMPANY DOCUMENT DETAILS screen you can view the email sent using the **Outbound** link under **OTHER OPTIONS**.

Create CompanyFind CompanyDocumentsRun Report

360 zAdmin2 at 4:17 PM

Select a report:Company Documents Report

Company Name:

Search Text:

Property:All Properties [Select](#) [Clear](#)

Region:

Document Type:

Contract Type:

Category:

Document Status:

Minority:

Woman-Owned:

Expiration Date:

Preferred Vendor:

Contract Manager:

Status:

Vendor:

Master Agreement?:

OK

RESET

COMPANY DOCUMENTS REPORTING

19. Using the **Run Report** tab within the **Company** module, select the **Company Documents Report**.
20. Enter any criteria as desired to identify the appropriate Company Documents.
21. Click **OK** to run the report.
22. Review the columns for **Contact**, **Email** and **Send Email?** fields in order to identify any missing configurations.

EXCERPT from Company Documents Report (Note some columns are hidden):

	C	D	E	V	W	AA	AE	R
1	Expires	Document#	Company	Contact	Contact Phone	Email	Send Email?	
	12/30/2012		5 ABC Company	Joe Smith	312.222.1234	joe@abc.com	Yes	
6								