

Company Documents - Online Documents (Printable Form Letters)

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 produce form letters called **Online Documents** using the data stored in Company Document records. Common form letters include COI renewal letters, work authorization letters, and contract renewal letters. An Online Document is produced using a pre-established Print Format. The Print Format uses a combination of data stored in Company Documents and fixed text. See your system administrator if the appropriate Print Format(s) are not configured in your database.

This document outlines the following topics for Online Documents:

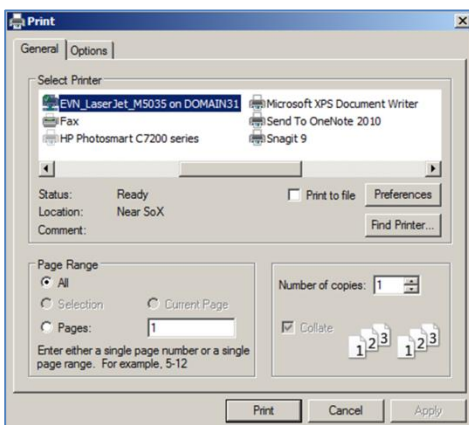
- Creating Online Documents for Multiple Companies from the Find Results Screen
- Creating an Online Document for a Single Company from the Company Details Screen

See related documents or Online Help for details related to Company Documents and to other functionality within the Company module.



Document #	Company	Type	Contract Type	Status	Expiration	Property
67	24-7 Generators	COI - Vendor		Fully Executed	100 Central Street	
Description: \$100,000 Auto Exp. Date: 7/31/2011 Liability Value: \$1,000,000 Worker's Comp Exp. Date: 03/23/2007 Worker's Comp. Value: \$1,000,000 Umbrella Exp. Date: 03/23/2007 Umbrella Value: \$5,000,000				Expires: 7/31/2011	DETAILS	
90	24-7 Generators	COI - Vendor		Fully Executed		
Description: VENDOR COI				Expires: 3/15/2012	DETAILS	
92	24-7 Generators	Contracts		Fully Executed	Main Building	
Description: escription					DETAILS	

Project: Electrical Issues Noc



Print dialog box showing printer selection and print options.

CREATING ONLINE DOCUMENTS FOR MULTIPLE COMPANIES FROM THE DOCUMENTS SEARCH RESULTS

1. This section outlines using a single Print Format across documents for multiple companies. For example, you may choose to print the COI renewal letter for all vendors with certificates expiring in the coming month.
2. Using the **Documents** tab within the **Company** module, enter search criteria for the desired companies for which you wish to print Online Documents. (Here you may narrow your results to a single document or multiple documents.)
3. Click **FIND**.
4. Click the **Select a format** box above the search results to choose a Print Format.
5. Note: The system will print an Online Document for all documents displayed in the search results. If you do not wish to print documents for all displayed, then refine your search and click FIND again.
6. Click **Print**.
7. In the Print dialog box, click Print to print the Online Documents.
8. If you wish to preview the Online Documents first, **Cancel** the Print dialog box and preview the Online Document using **File / Print Preview** from your browser.
9. Note that the Print Preview window should have an icon to remove headers/footers.
10. Note: The Online Documents created using the Print Formats are not saved. If you wish to save an electronic version of your Online Documents, you can print to a PDF file.

CREATING AN ONLINE DOCUMENT FOR A SINGLE COMPANY FROM THE COMPANY DETAILS SCREEN

11. This section outlines printing an Online Document from the COMPANY DETAILS screen for a single company.
12. Using the **Find Company** tab within the **Company** module, locate and select a company record.
13. On the COMPANY DETAILS screen, view the items listed under COMPANY DOCUMENTS. Click **DETAILS** for the desired Company Document.
14. From the VIEW DOCUMENTS DETAILS screen, click the **Online Document** link.
15. Select a form for this document using the drop-down box and click **SELECT**.
16. Note: When using the Online Document from the Document Details view, you can add or edit text to the Online Document in addition to what is provided via the Print Format. The additional text will be on the current document only and will not change the standard Print Format.
17. The file can also be exported to a MS Word Document for further editing by clicking **Export** at the top of the screen.

COMPANY DOCUMENTS					Add Document
Document#	Company	Type	Contract Type	Status Expiration	Property
21	360Facility	Certificate of Insurance		Fully Executed	
Description:	COI			Expires:4/17/2012	
					DETAILS

[Create Company](#)
[Find Company](#)
[Documents](#)
[Run Report](#)
360 zAdmin2 at 7:05 PM

VIEW DOCUMENT DETAILS

■ indicates a required field

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

Company:	360Facility	Property:	
Document #:	21	Master Agreement?:	No
Document Type:	Certificate of Insurance	Contract Type:	
Description:	COI		
Document Status:	Fully Executed	Status Comments:	
Contract Manager:			

EDIT DOCUMENT DETAILS

■ indicates a required field

COMPANY DOCUMENT DETAILS [Return to Document](#) | [Export](#) | [Review](#)

Company:	360Facility	Property:	NA
Document #:	21	Master Agreement?:	No
Document Type:	Certificate of Insurance	Contract Type:	
Description:	COI		

Select a form for this document: [SELECT](#)

Source

Style

Format

Font

Size

9/16/2013

Grant warfield
360Facility
990 Grove St
Suite 500
Evanston, IL 60201

Dear Grant warfield,

This letter is to inform you that your Certificate of Insurance expires on 4/17/2012. Please provide a renewed Certificate by fax, as well as