



## C-surance.ca: Predefined document module.

### Module presentation

This module enables you to create pre-formatted letters that can be sent via mail and/or e-mail. Predefined documents module is mainly used to store your pre-formatted letters. You can use Microsoft word or any other text editor software to create pre-formatted letters.

Letters in the predefined documents module are transformed in RTF (Rich Text Format).

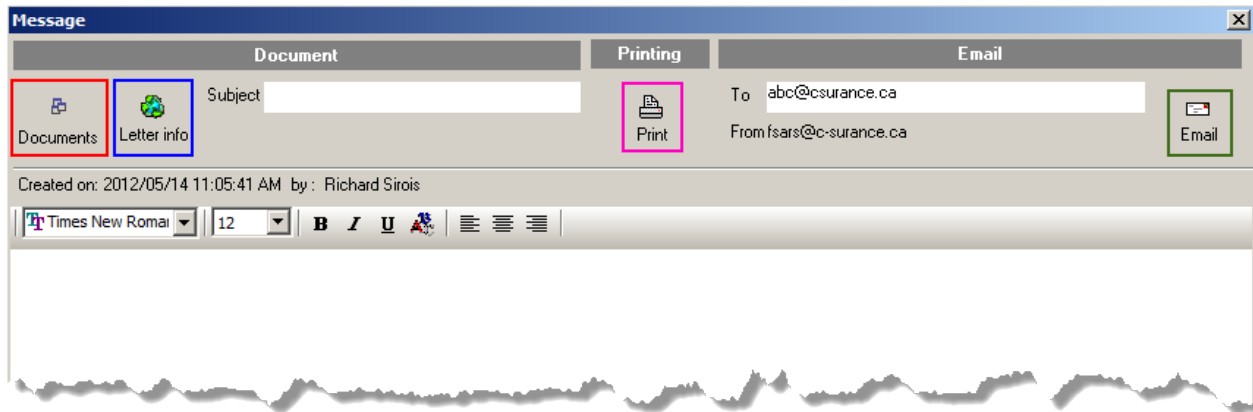
Lists of formatting fields are available to ensure a smooth fusion of the data with the recipient's information's. Fields are different according to the language (French/English) and have to be used accordingly.

Usage example:

- Employee communications
- Letters to resource people in the corporation
- Letters with formatted address to fit with window envelopes
- Ect...

## Work area presentation

- The **“Documents”** button enables you to open the predefined documents module to select or/and create pre-formatted letters.
- The **“Letter info”** button enables you to merge field names with data.
- The **“Print”** button prints the letter.
- The **“Email”** button sends the letter electronically. (where e-mail address is available)

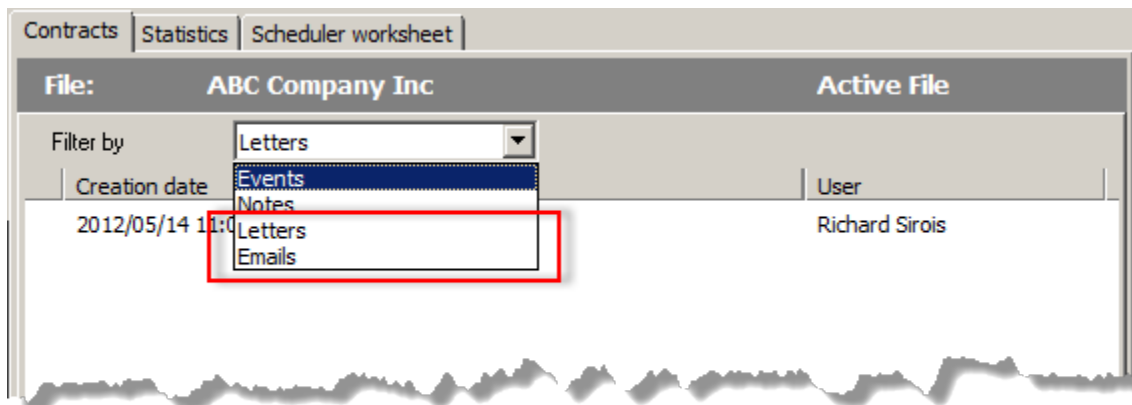


## Module usage

The predefined document module is available from the *company profile screen*, *company contacts screen* and in the *employee file screen* by using the following button:



When using the print or e-mail functions the information will be kept in history in the company general information screen. Printed letters are kept under the **“Letters”** filter and the letters sent via Email are kept under the **“Email”** filter.



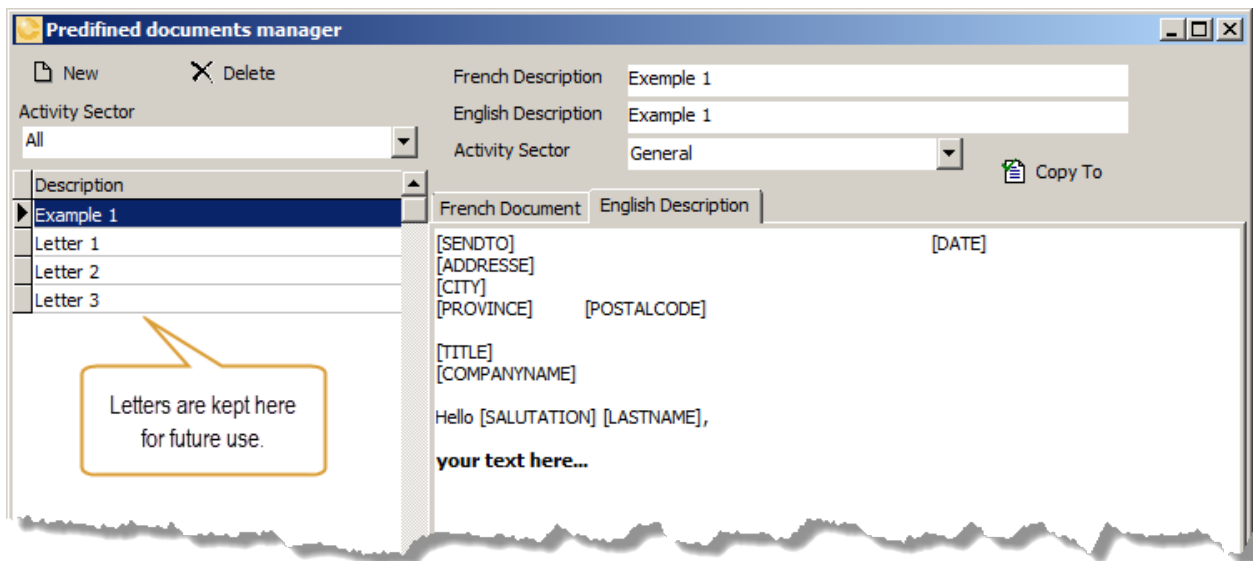
 Available data fields

French	English	Description
[DESTINATAIRE]	[SENDTO]	Last name and first name of addressee
[ADRESSE]	[ADDRESS]	Address of addressee
[VILLE]	[CITY]	City of addressee
[PROVINCE]	[PROVINCE]	Province of addressee
[CODEPOSTAL]	[POSTALCODE]	Postal code of addressee
[SALUTATION]	[SALUTATION]	Salutation (if available)
[TITRE]	[TITLE]	Title
[NOMCOMPAGNIE]	[COMPANYNAME]	Company name
[NOM]	[LASTNAME]	Last name
[PRENOM]	[FIRSTNAME]	First name
[EMAIL]	[EMAIL]	Email address
[DATE]	[DATE]	Date

## Letter example

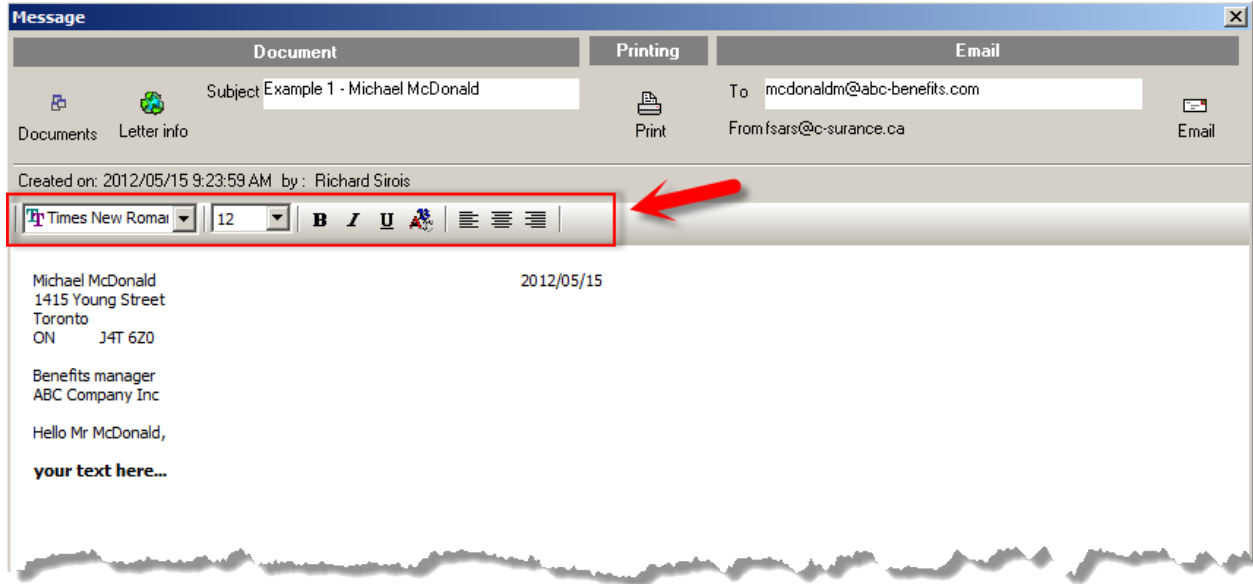
Pre-formatted letter created using the predefined documents module. Once you placed the tags on the form and you typed your letter, click on the button called **“Copy To”** in order to see the result. All the letters you created are kept for future use and you can see them on the left section.

- Button **“New”** is used to create a new document;
- Button **“Delete”** is used to delete a selected document;
- Button **“Copy To”** is used to see the result document;
- The **“English Description”** tab is used for english letters;
- The **“French Description”** tab is used for french letters.



This is the result of the letter as formatted above with available fields. You can use the provided tools to change the font type, font size, bold, underline, etc...

You can also select the text, copy and paste in *Microsoft Word* to work on the presentation.



## Security

Security item « Activate Letter Module » must be activated in order to use this module.