

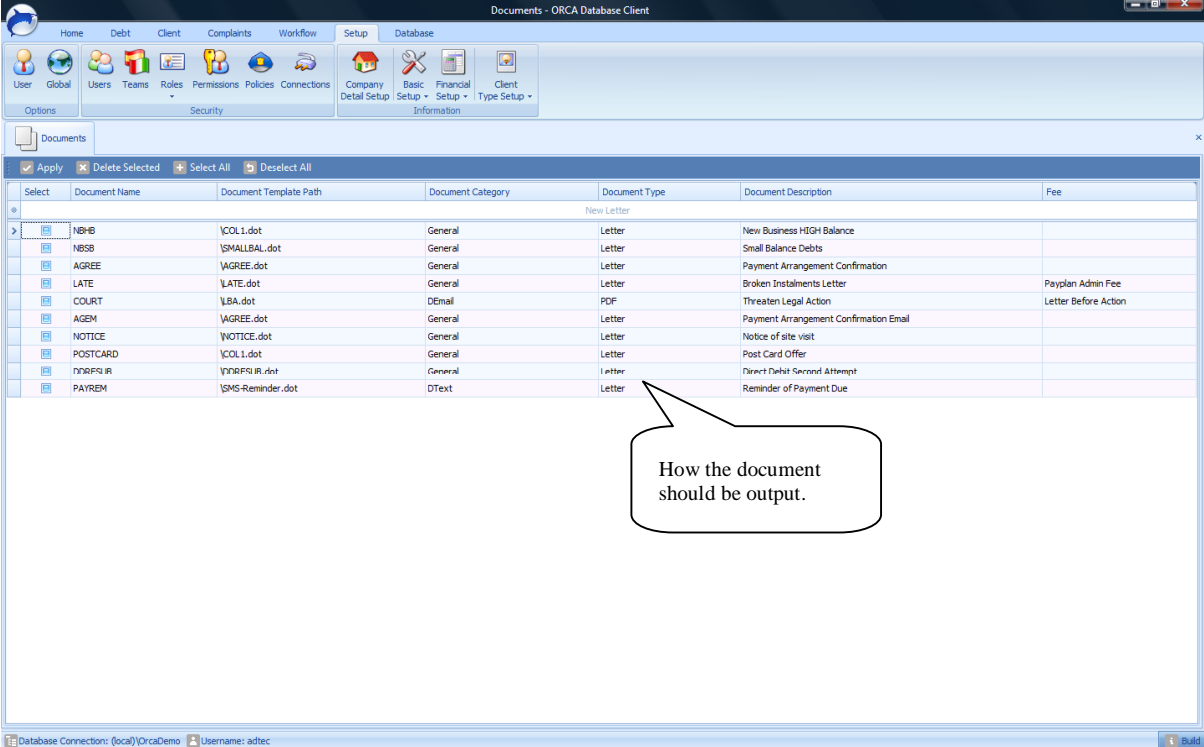


Document Management

The ORCA system allows for the production of documents in various output formats.

All documents are created using Microsoft Word and are stored in one central library.

Within the **setup** section of the system, you can maintain a list of document names that can be produced and specify the method in which the document should be output.



Select	Document Name	Document Template Path	Document Category	Document Type	Document Description	Fee
	New Letter					
<input type="checkbox"/>	NBHB	\COL 1.dot	General	Letter	New Business HIGH Balance	
<input type="checkbox"/>	NBSB	\SMALLBAL.dot	General	Letter	Small Balance Debts	
<input type="checkbox"/>	AGREE	\AGREE.dot	General	Letter	Payment Arrangement Confirmation	
<input type="checkbox"/>	LATE	\LATE.dot	General	Letter	Broken Instalments Letter	Payplan Admin Fee
<input type="checkbox"/>	COURT	\LBA.dot	DEmail	PDF	Threaten Legal Action	Letter Before Action
<input type="checkbox"/>	AGEM	\AGREE.dot	General	Letter	Payment Arrangement Confirmation Email	
<input type="checkbox"/>	NOTICE	\NOTICE.dot	General	Letter	Notice of site visit	
<input type="checkbox"/>	POSTCARD	\COL 1.dot	General	Letter	Post Card Offer	
<input type="checkbox"/>	DIRDFSI R	\DIRDFSI R.dot	General	Letter	Direct Debit Second Attempt	
<input type="checkbox"/>	PAYREM	\SMS-Reminder.dot	DText	Letter	Reminder of Payment Due	

Sample list of documents that can be sent from within ORCA.

Document Formats

Documents can be output in either of the following formats :-

- Straight to Printer
- In PDF Format
- By Email
- SMS Text Message
- Output to a CSV File

Client Specific controls

You may also specify which documents can be printed on a client by client basis.

e.g. You wouldn't want a letter chasing an overdue GAS bill to be sent to a T-Mobile debtor.

Fee Generation

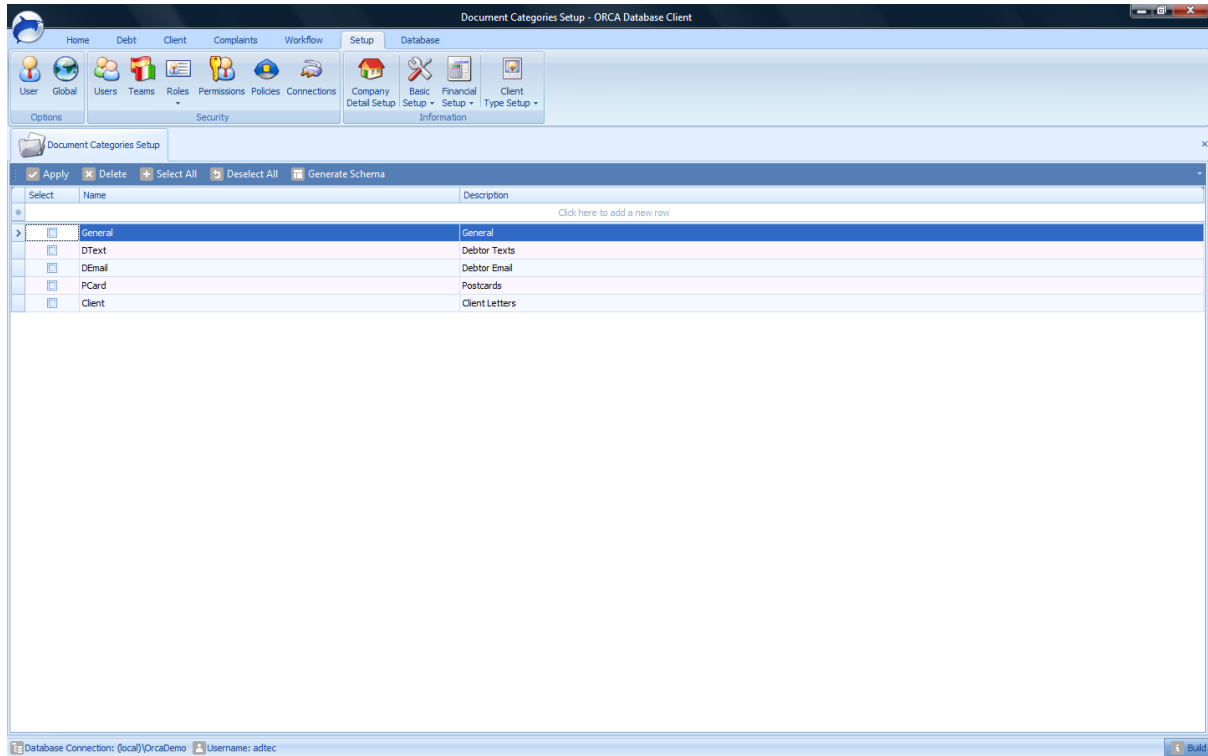
You may also specify at document level, whether a fee should be charged to the client for the production of any document. The fee amount can be overwritten at client level.

E.g. Client A may get billed £5 for letter LBA, but client B would get billed £3.50.

All documents that get requested by users throughout the day will be stored in the Document Production Centre (DPC) database.

When setting up your documents you will be asked to allocate a **category** to the document, this is useful when deciding which documents to output first.

E.g. Print all of my Client letters, then my General Letters followed by all of the emails.



Sample Document Categories.

Document Archiving

All documents that get produced will automatically be archived and stamped against the account for future reference. All archive documents are stored in PDF format and can be viewed by simply clicking on the item within the account audit screen.

Change Control

In order to keep track of what changes have been made to your library of document templates, the system will automatically take a copy of a template before you change it, allowing for a full version history to be maintained.