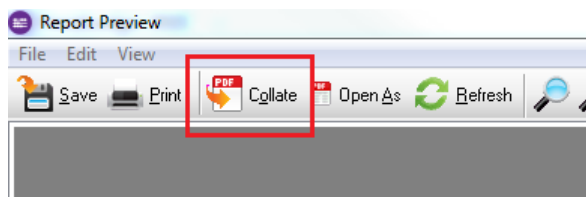


Creating, Saving and Emailing collated documents in Document Manager

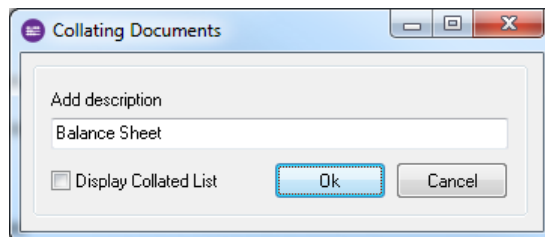
Document Manager allows you to collate multiple reports from all HandiSoft programs into a single PDF document, under the client's folder in Document Manager. The collated document can be saved and / or emailed to the client.

Annotating the reports to be collated

1. Preview one of the reports you want to collate in the applicable HandiSoft program and in the **Report Preview** window, click on the **Collate** icon on the Toolbar.



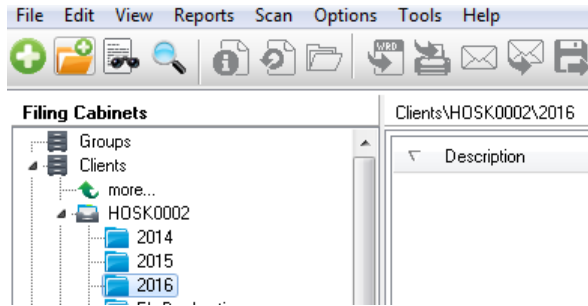
2. In the **Report Description** window, complete the description field, and click **OK**, and **Close** out of the **Report Preview** window.



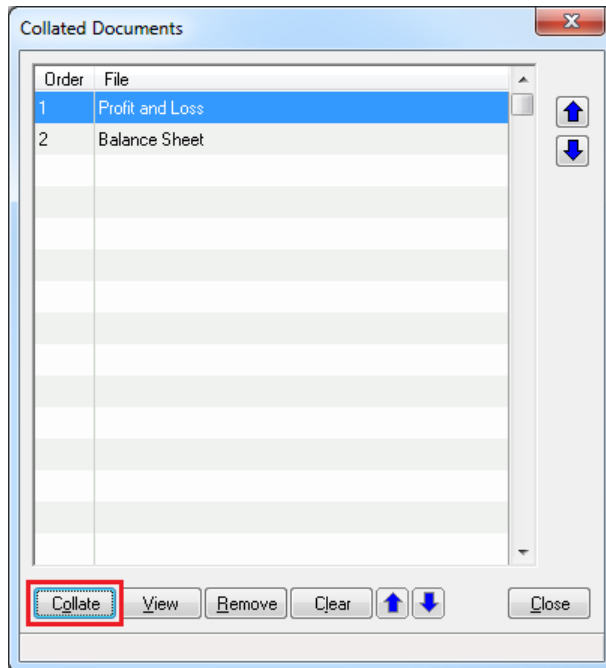
3. Repeat the process for all the reports you want to collate from the different HandiSoft programs, the collated list can be displayed by selecting the **Display Collated List** option.

Collating the Documents in Document Manager

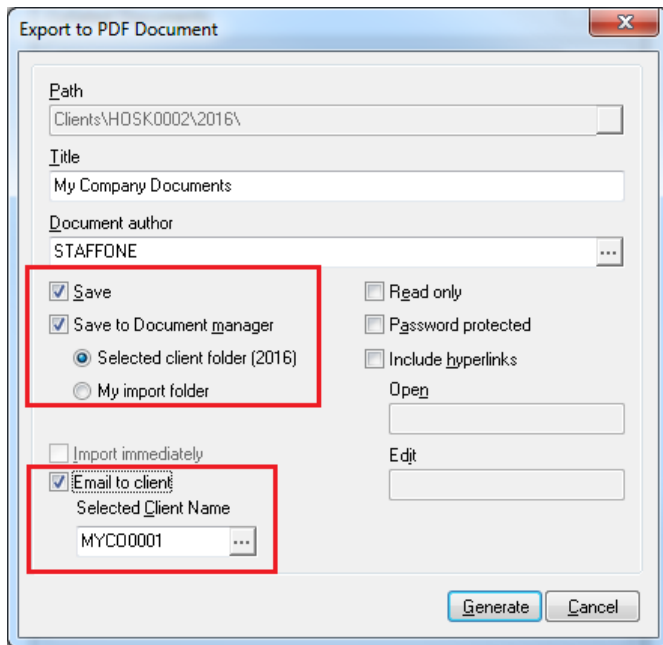
1. In **Document Manager** open the folder where the collated document is to be saved to.



2. From the **View** menu, click **Collated Documents**.
3. In the **Collated Documents** window, you can order the reports by highlighting the report and using the arrow buttons to move it to the required position, unwanted reports can be deleted by clicking **Remove**.
4. To collate the reports into the document, click **Collate**.



5. Complete the **Export to PDF Document** window. The collated document can be saved and /or emailed to the client by selecting the applicable options, and clicking **Generate**.



Notes:

- The collate function is only available if Document Manager is enabled.
- Documents that have already been saved into Document Manager for example, Word or Text documents, can also be added to the reports to be collated list by highlighting them and clicking the **Collate** icon on the Toolbar.
- The reports need to be cleared each time you want to start a new set of collated reports.