**DOCUMENTS TAB**

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As with everything in Gifts, what you see on-screen is the result of the most recent search or item focused on. Therefore, you can find documents related to a specific request, an organization, a payment, or a contact. When clicking on the documents tab, a list of the correspondence pertaining to the last item focused on is produced.

Two types of documents are stored in this tab. The first is labeled Mail and shows up in blue. The other is called External Document and is listed in green.

Mail items are system generated. If there is a file name associated with a Mail item listed, you may double-click to open it, at which time you can edit, save or print. If the letter was not saved, there is no file to open. The only information available is the name of the document and the date it was prepared. Form letters are generally not saved unless specific elements have been added to the letter, i.e. positive and negative reply letters and acknowledgement letters.

An External Document is one that was scanned and saved as a PDF file, and then attached to the specific record using the “Attach External Document” process. [See next page.] These items can be opened, edited and printed.