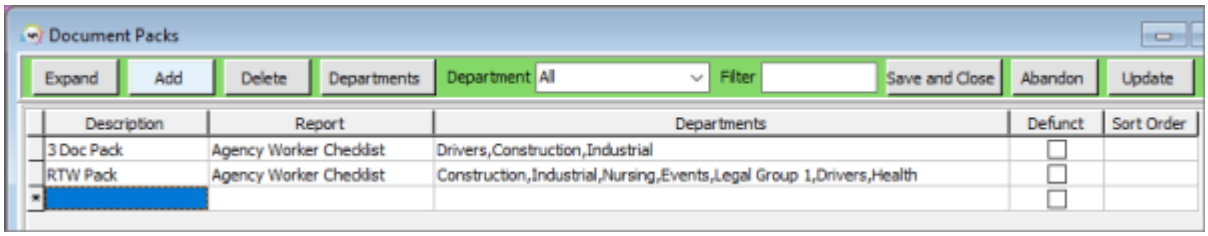
Compliance Document Packs

A document pack will consist of a number of document types (global or departmental).
A report is required to bring the documents together in the sendout. *IQX will need to write*.
A Pack can be associated with a variety of Departments, or all.
BEFORE a Document Pack can be created the elements need to be set up.

Document Types are set up in Agency Setup.
If you want a word document to be added to the pack that will be auto generated on the fly you need to set this up in Document Templates, Checklist.
Document Stamping Images – are set up in Compliance, Document stamps. A variety of images can be saved.
Compliance Reports - are set up in Compliance, Reports. Use the Add button to browse for the Report(s) to use. *These need to be set up with IQX.*

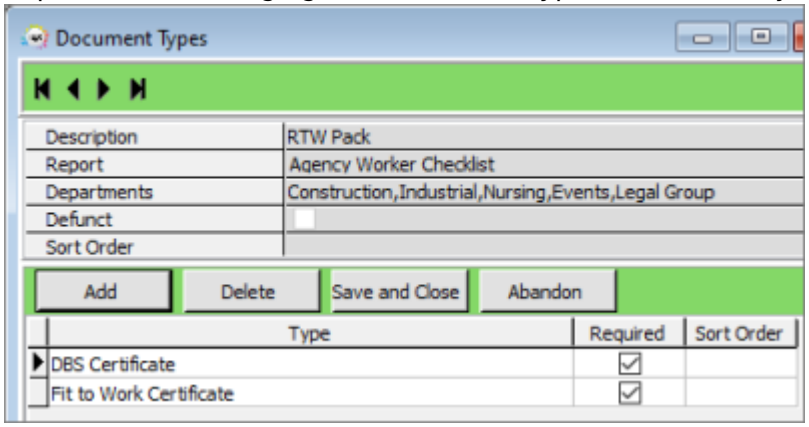
Create a Document Pack

Refers to Compliance - Document Packs



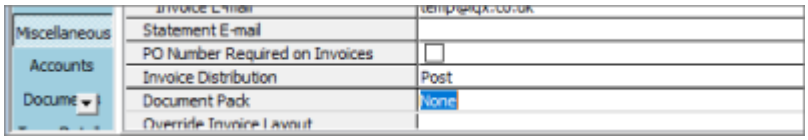
- Use the Add button to create a new line – Enter the name (this can be directly edited here at any time)
- The Reports field has a drop down to select from.
- Use the Departments button to select the group of Departments that will use the Pack.
- Add a Sort Order for selection.
- Should a Pack be made Defunct tick the box in the grid.

Expand is for managing the Document Types to be used by the Pack.



- Use the Add button to activate a new line with drop down list of documents.
- A Document that is not set to required will be included only if it exists.

Company set up for Document Packs



Miscellaneous/Accounts Setup on the Company record SELECT the Documents Pack to be used. Only one type per client. This will ensure that whenever a pack is sent to this client the correct pack is selected.

From:
https://iqxusers.co.uk/iqxhelp/ - **IQX**

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