References

Set up - for Systems Administrators

1. Create a contact event type - called Reference Request or something similar. Go to Maintenance, Agency Setup, Contact Event Types NEW.
2. If you wish to send a standard document out with the reference request, create the document and save it in the reports directory.
3. Link the document to the the Contact Event type by entering the full document filename in the client email attachment column (Agency Setup, Contact Event Types, Email Attachments.) Multiple attachments must be seperated with a semi colon (;). Each time this contact event type is used to send an email it will attach the document(s).
4. Create boiler plate text if you wish to have a standard email text to be used. Using the insert text on the contact event makes sending the request quicker. (Maintenance, Agency Setup, Boiler Plate Text, ADD). See also Boiler Plate Text.
5. Finally switch on References for the database. General Settings, Switchable Views, 110 Person Reference Request Y.

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