

The SDM Document Manager Module provides the facility to store letters generated from SDM and other scanned files into a user defined Document Storage Location Folder linked to the SDM Diary System.

The Document Manager Module provides the capability of holding an inbuilt 'house file' document management system with SDM System and can be used across various diary systems within SDM Housing Software Modules.

Key Information

Diary Systems

- Diary Category Code User Defined Document Storage Location Folder Configuration
- Diary Action Code – Default Diary Text capability for sending letters via email

Tenant Details

- Paper Free Flag
- Capture of Tenant Email Address
- Document Manager View
- Document Storage Location View
- Storage of Tenant Related Scanned Files

Property Details

- Document Manager View
- Storage of Property Related Scanned Files
- Storage of Property Tenant Related Scanned Files

Applicant Details

- Document Manager View
- Storage of Applicant Related Scanned Files

Complaint Details

- Scanned documentation relating to complaints held within Document Manager

Repairs Works Orders

- Scanned documentation relating to Repairs Works Orders

Purchase Ledger

- Scanned documentation relating to Invoices, Suppliers etc

Main Features

- Links to Standard Letters via word and diary system
- Letters stored as attachments and filed in pre-defined document storage location folders
- Scanned files auto filed against diary entries
- Documents stored as either Tenant Related, Property Related or property Tenant Related
- Documents stay with tenant on tenancy termination if tenant related
- Documents stay with property if property related irrespective of which tenant is linked to the property
- Paper Free Capability linked to standard letters mail merge facility
- Letters can be stored as Word or PDF's when attached to diary and filed in the document storage location folder
- Sent on behalf of email address capability so that staff can link into email responses from tenants.

Integration

The SDM Document Manager links to various diary systems in each of the SDM Modules. It also links to the SDM My Home Web Portal. Tenants can log into the web portal and view letters that have been saved to the different document storage location folders as filed through the main SDM Housing System.