

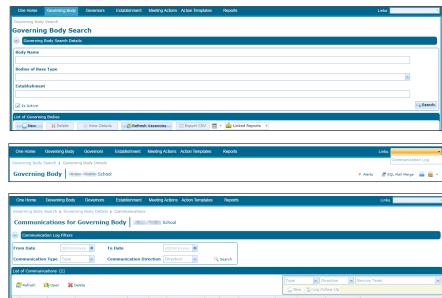
Governors

Recording Correspondence

Searching for Communications

- On the Governing Body Search page, search for the required governing body.
- 2. Double-click the required governing body to display the **Governing Body** page.
- Select Communication Log from the Links drop-down to display the Communications for Governing Body page.
- Populate the filters on the Communication Log Filters panel, if required.
- 5. Click the Search button.

The results of the search are displayed on the **List of Communications** panel.



Recording a New Communication

Email

Log Date

Inbound

09/07/2013

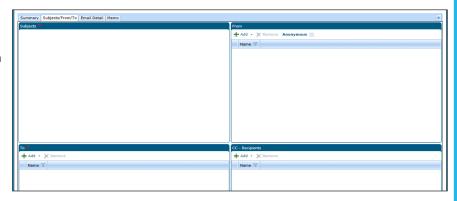
- On the List of Communications panel, select a Type, Direction and Service Team from the drop-downs.
- Click the New button to display the Communication Log Details page.
- Enter details of the communication on the Summary tab. Fields on this tab are dependant on the Communication Type.
- Select the Response Required check box, if required, and enter a Response Due Date.
- 5. Select a Referred To, if required.
- Select the Subjects/From/To tab to record the person who initiated the communication and to whom the communication was sent.
- On the From panel, click the Add button to display the Person Search, or if the communication is anonymous, select the Anonymous check box.
- 8. On the **To** panel, click the **Add** button to display the **Person Search**.
- If required, on the CC Recipients panel, click the Add button, if required, to display the Person Search.

New Log	; Follow-Up		
Governing Body Search > Governing Body Details > Communications > Communication Details Communication Log Details			
Summary Subjects/From/To Email Detail Memo			
Summary			
Communication Type	Email	Communication Direction	Inbound
Service Team			

Log Time

09:51

Service Team



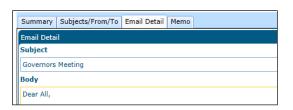


Governors

Recording Correspondence

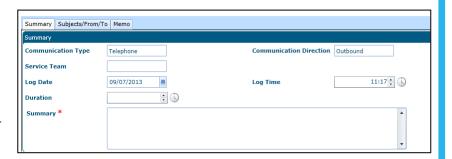
Recording an Email

- On the Email Detail tab, enter the Subject and Body of the email.
- 2. Click the **Save** button at the top of the page.



Recording a Telephone Call or SMS

- On the Summary tab, enter the Service Team involved and the Date and Time, if required. Enter the Duration of the telephone call, if required.
- 2. Enter a **Summary** of the telephone call or SMS message.
- 3. Click the **Save** button at the top of the page.



Recording a Letter or Fax

- On the Letter Details tab, enter the Received / Sent Date, Letter Date, Print Date and Letter Reference of the letter or fax, if required.
- 2. Click the **Save** button at the top of the page.



Recording a Memo

- Select the **Memo** tab to record a memo related to any type of communication.
- 2. Click the **Save** button at the top of the page.





Related Reference Guides:

- Governors Primary Navigation
- Governors Person Search
- Governors Correspondence Follow-Up

