Managing Agreements and Compliance

User Guide 8 Managing Correspondence

Overview

This User Guide provides instructions on how use Plaza™'s correspondence function

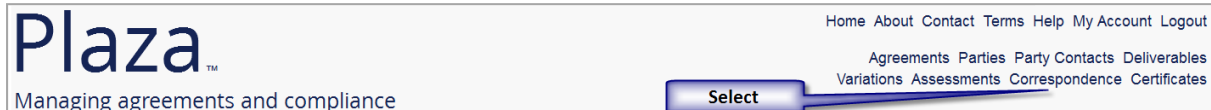Navigate to the Correspondence page by selecting the Correspondence link.

Figure 1 Correspondence link

Before creating correspondence, it is useful to understand the different functions and filters accessible from the Correspondence menu (i.e. via the Correspondence link):

Figure 2 Correspondence menu

Functions

- **Add New**   Add a new item of correspondence (Discussed in detail below)
- **Show Deleted**   Displays all correspondence that has been deleted
                       (then you have the option to hide deleted)
- **Download**   Download correspondence details into Excel

You can filter your view by selecting one of the following options:

Filters

- **Mine (from my party)**   Displays only the correspondence issued from your Party
- **Shared with me**   Displays correspondence that has been shared with you
- **Public**   Displays all correspondence listed as Public

Correspondence

You can add Correspondence via:

1. Correspondence link in the top and bottom right hand corner, or
2. Agreements tile or link.

Via the Correspondence link

1. Click on the Correspondence link in the top or bottom right hand corners

Via the Agreements tile/link

1. Click on the **Agreements** tile or the 'Agreements' link in the top or bottom right-hand corners
2. **Select** your newly created Agreement from the list
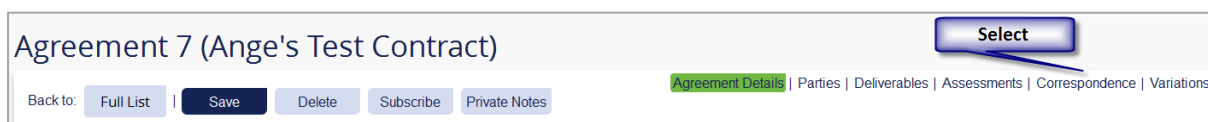3. Click on **Correspondence** on the right hand side (Figure 3)

Figure 3 Select 'Correspondence'