






















## Documents

The Documents option is used to select all the pages that are to be printed for a specific document. This way a document can be printed with one selection rather than one selection for each page of the document. The maximum number of documents allowed on the system at one time is 999.

After making the selection, the system displays the existing documents already on the system.

System Settings - Documents	
NAME	ID
 ARM Initial Rate Chg Notice	73
 ARM Rate & Payment Change MA	27
 ARM Rate and Payment Notice	24
 ARM Rate and Pmt Change	77
 ATM Debit Card Authorization	50
 Boat Registration Fort	189
 Borrower's Authorization	32
 C Pay Letters Muskogee	78
 Cash Safe Dep Notice	29
 Collection Letter	41
 Consumer CC Agreement	80
 Counseling Acknowledgement	43
 County 82014 Dot Matrix	5 (Dot Matrix)
 County Chattel Security Agree	110 (Dot Matrix)
 County Note & Disclosure	109 (Dot Matrix)
 Courtesy Pay Notices 10 Days	44
 Courtesy Pay Test	72
 C Pay 20 day Letter	68
 Credit Card Application	38
 Credit Insurance OE Disclosure	142
 Credit Score Disclosure	48

**Figure 1**

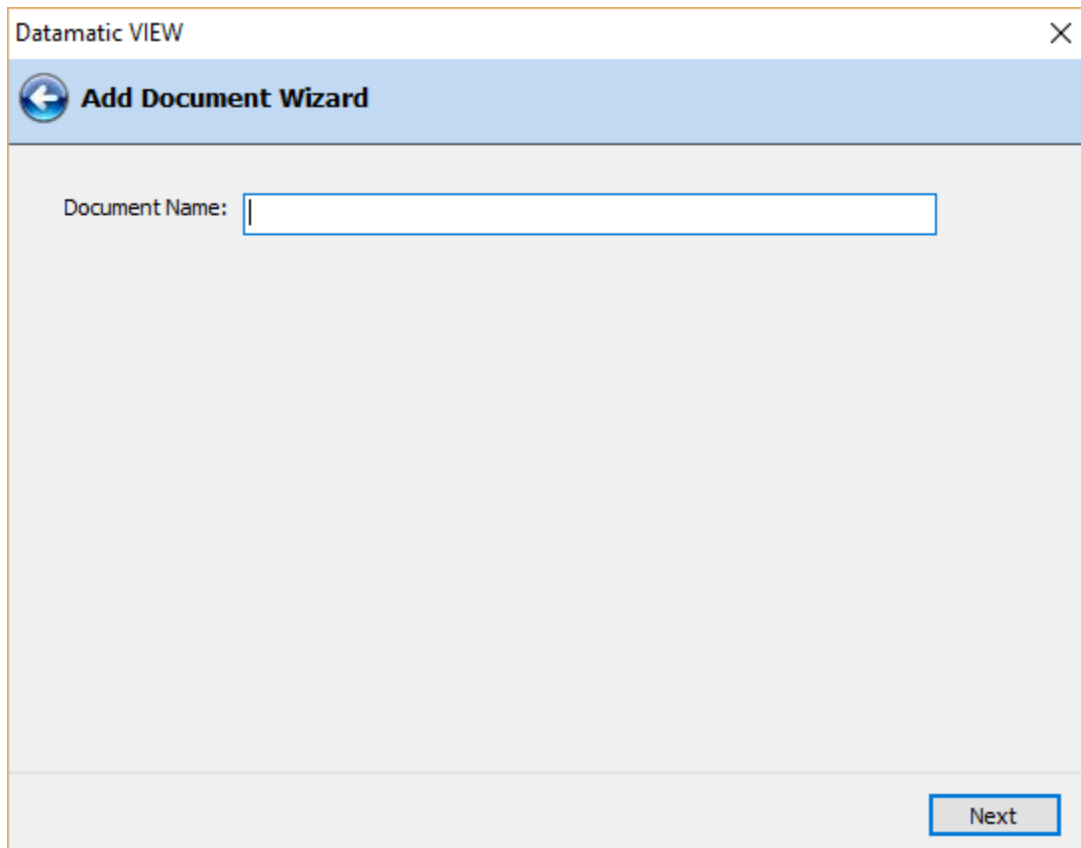
This window can be used to make create a new document, edit a document or delete a document.

## Add Document

To add a new document to the system, click on the **Add** icon on the ribbon.

**\*\*IMPORTANT:** Before creating a new document or adding a new page to an existing document, the individual page(s) must be created first. This is done under [\[Main Ribbon > System Settings > Pages\]](#).

The **Add Document** wizard is displayed.



Datamatic VIEW

← Add Document Wizard

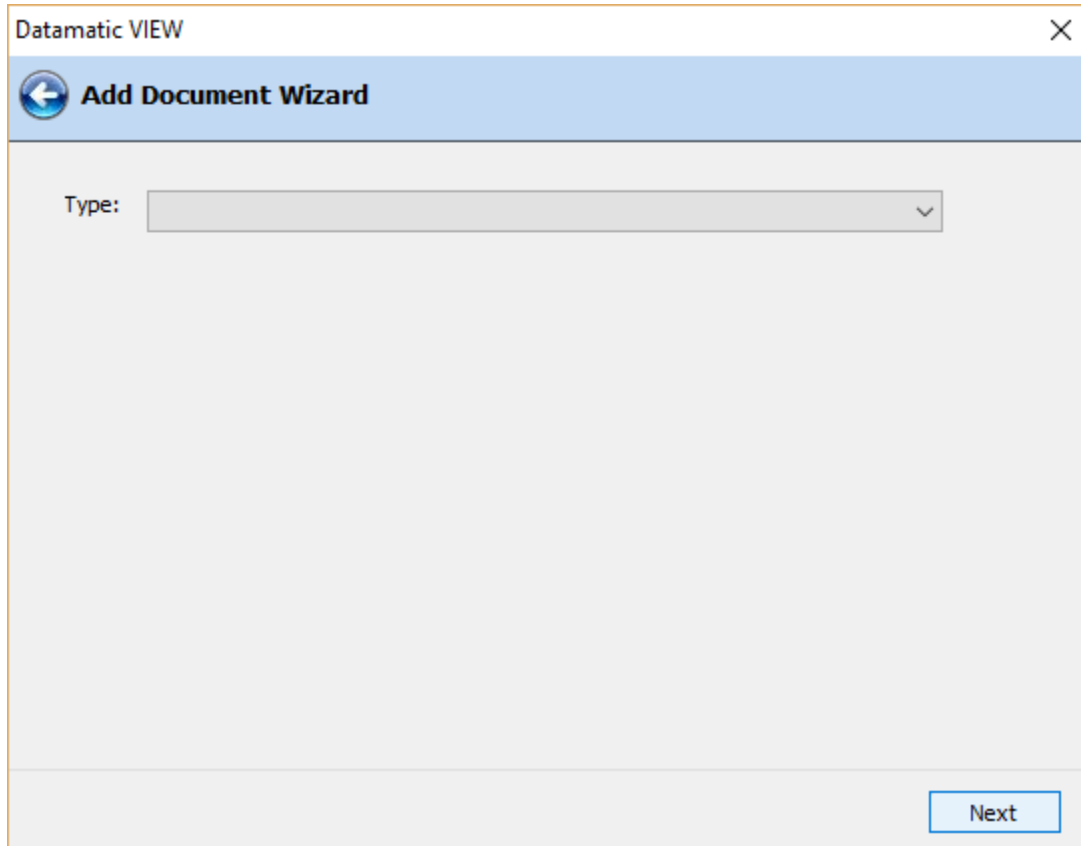
Document Name:

Next

**Figure 2**

Enter a descriptive name for the new document in the Document Name field. Continue to the next window.

The system displays.



**Figure 3**

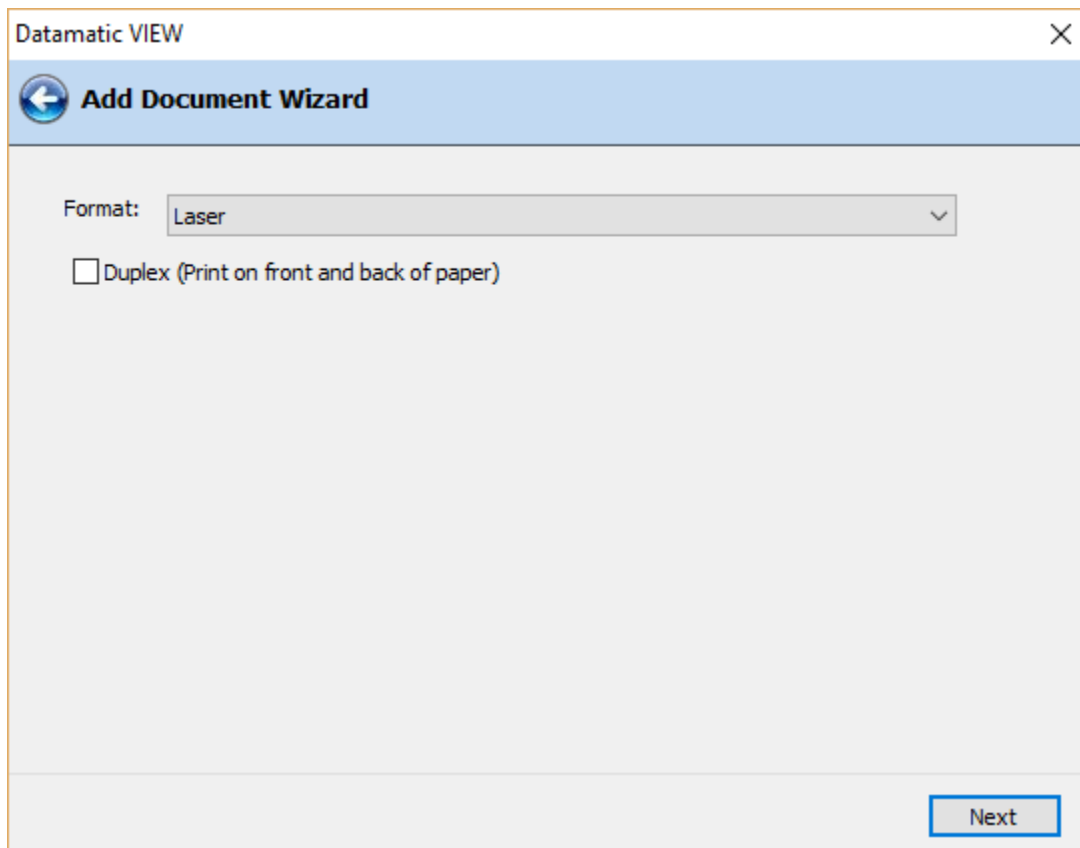
Select the type of document being created. The selections are:

Address Change ***	Loan Document
Adverse Action ***	Loan Extension
ARM Initial Notice ***	Membership ***
ARM Rate Change Notice ***	Notice of Right to Cancel
Arta (third party software) ***	Open End Plan ***
Certificate ***	Safe Deposit Box (Form) ***
Collection (notice) ***	Safe Deposit Box Notice ***
Courtesy Pay ***	Stop Payment ***
Debt Protection ***	Subsequent Action ***
Loan Application	

**\*\*\* Laser format only.**

Continue to the next window.

The system displays.



**Figure 4**

Select the format for this document for printing.

The options for this field are:   Dot Matrix \*\*  
  Laser

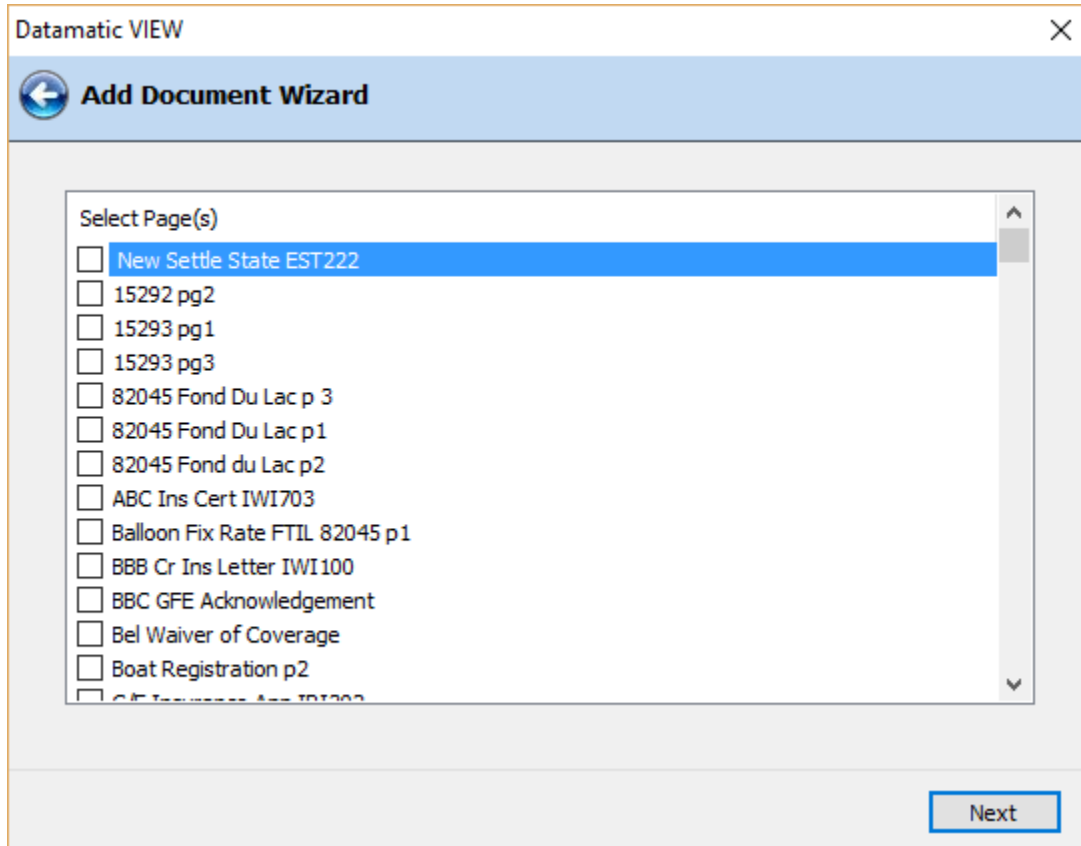
\*\*Dot Matrix formats (for Okidata printers) are only available for new documents for the following types:

Loan Document	Loan Application
Loan Extension	Notice of Right to Cancel

\*\*\***Note:** The **Duplex** option can only be used if “Laser” is selected as the format for printing. Put a checkmark in the box by either clicking on the box or tabbing to the option and pressing the spacebar, if the documents will be printed on a laser printer that duplexes.

Continue to the next window.

The system displays.



**Figure 5**

All of the pages that have been setup for the document type selected will be displayed. Select the pages that are to be included in the document being created. The pages are listed in alphabetical order in the Add Document Wizard based on the page names.

**\*\*Note:** Some or all of the pages may need to be selected depending on which pages are needed for the document being setup.

Continue to the next window.

The system displays a window to preview the information entered in the wizard. If the information is correct, select Finish.

If changes need to be made, select the arrow in the upper left corner of the window to return to any of the previous windows and make the necessary changes. Select Next when finished to return to the preview window. Select finish, to add the new document to the system.

The new document is now displayed on the Documents window as the next available document number. Use the "scroll bar" on the right to display the documents that are not shown, if applicable.

## Edit Document

To edit an existing document, double click on the document.

Datamatic VIEW

**Edit Document**

Name:

Type:

Format:

Duplex (print on front and back of paper)

Pages:

Select Page(s)

- O/E Plan Insurance IWI7Q1
- OP Cons Debt Protect ILD100 p1
- OP HE Debt Protect ILD200 p1
- OP Cons Debt Prot S2 WID200 p1
- OP Cons Debt Prot S2 WID200 p2
- OP Cons Debt No Prot WID200 p1
- OP Cons Debt No Prot WID200 p2

Save

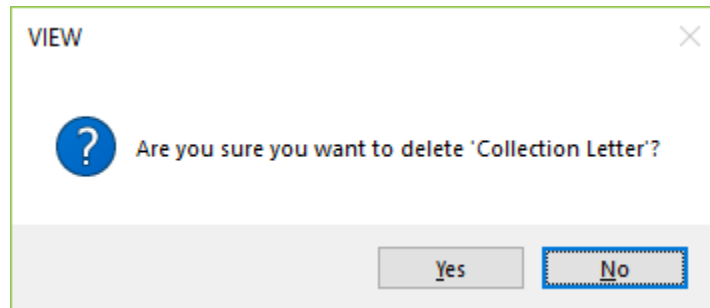
**Figure 6**

Make the needed changes then select Save.

**\*\*Note:** If the **Type** or **Format** need to be changed, it will be necessary to remove the document and start over.

## Delete Document

To delete a document, highlight the document then press the delete key.



After selecting a document to be deleted, a window is displayed asking “Are you sure you want to remove ‘xxxxxxxxxxxx’?”. Select the appropriate answer of “yes” or “no”.