One Mortgage System Ltd

NOTES AND DOCUMENTS

VERSION 4.3.4

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0203 911 2211 | support@omsystem.co.uk

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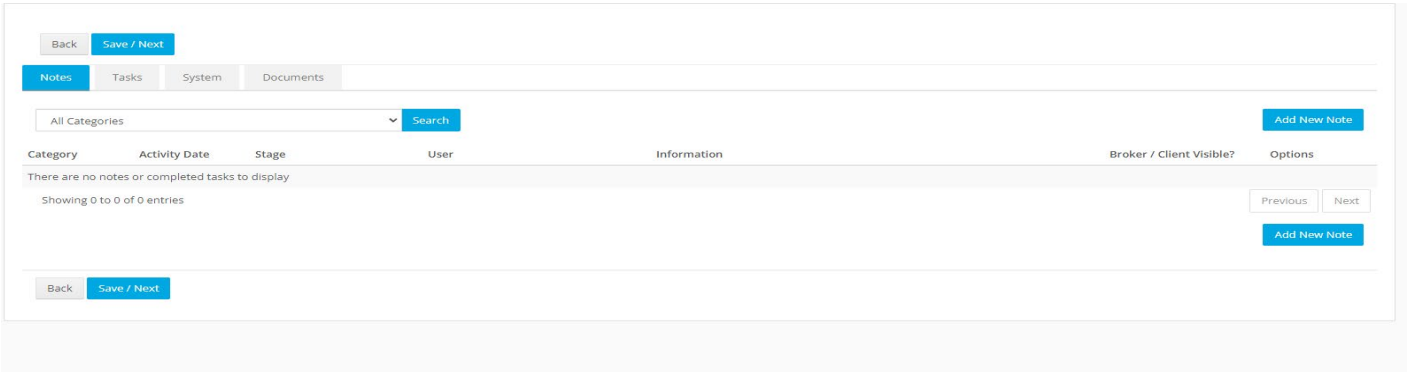
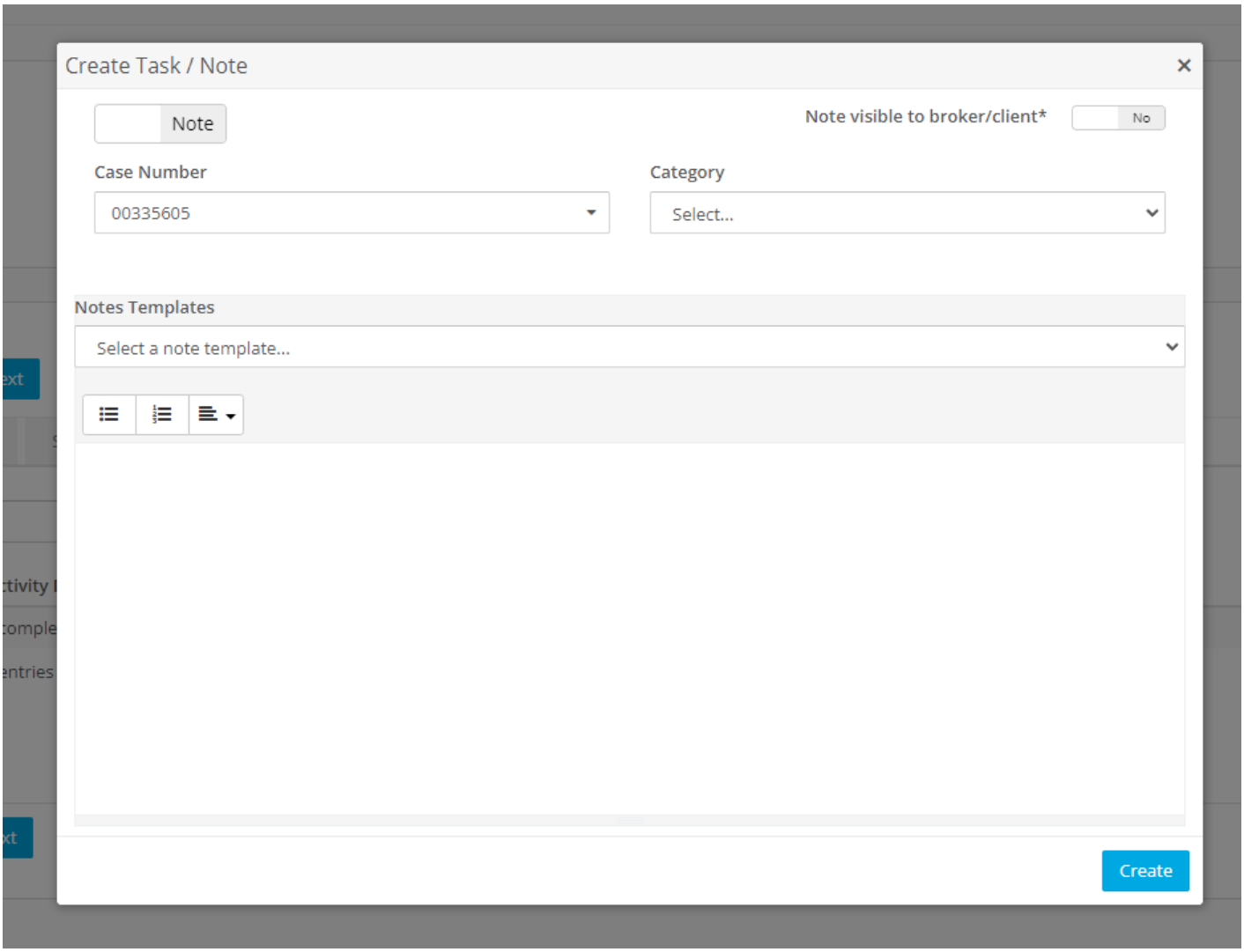
1. Notes

1.1. Adding a note

The notes tab is located on all case types and appears as below:

Fig. 1 – OMS Notes Screen





You can then type the note required.

The category sections are controlled in global settings.

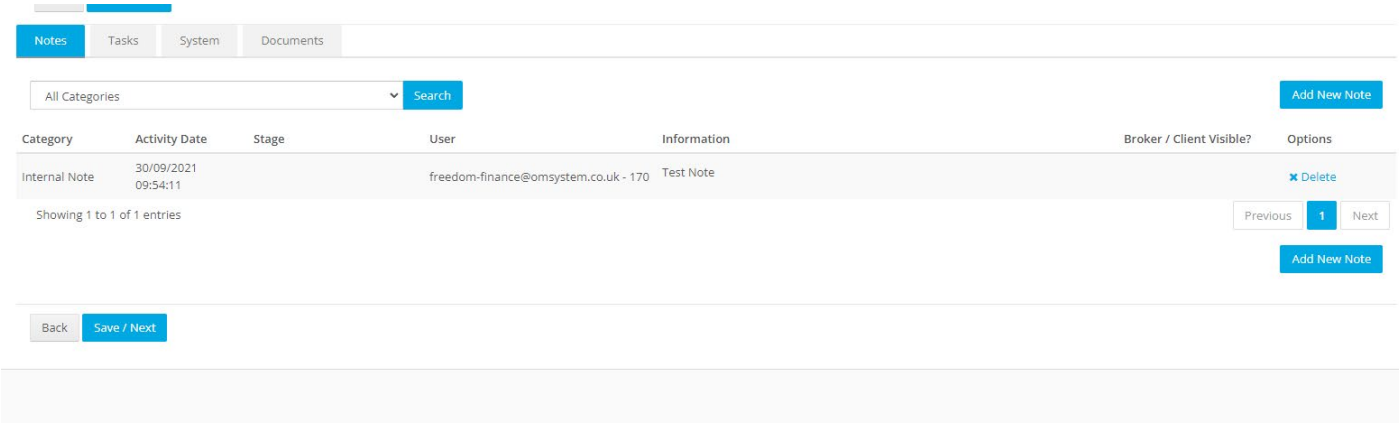
case.notes.categories	Advice Note,Internal Note,Client Note,Introducer Note,Lender Note,Solicitor Note, Other

You can produce note templates as well, via the Email / SMS settings in the settings manager.

The Note visible to broker / client is defaulted to no. If you set this to yes, the note will appear on the client / external broker site as well.

Once you press the save, the note is automatically added to the system.

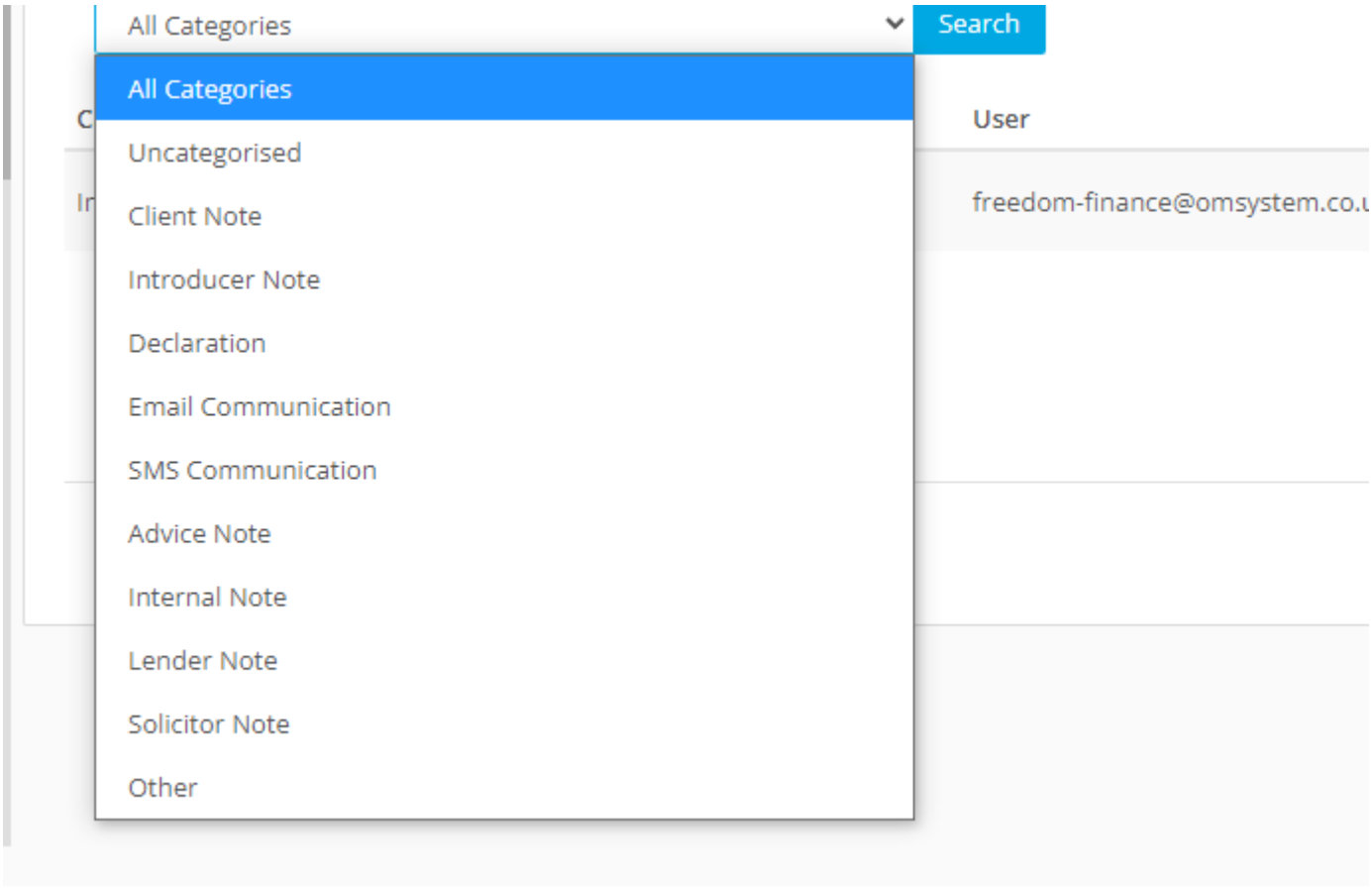
Deletion of notes is permissioned based, and all users will not see this function.



1.2 Searching notes

You can search for notes by category using the drop down.

Fig. 2 – Category Searching

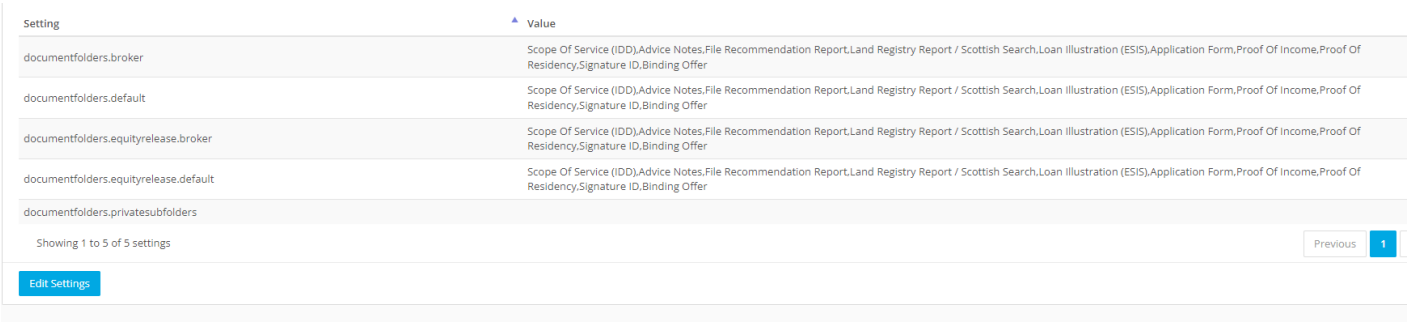


This will show all notes related to that category only.

2.0 Documents

The document tab is available on all case types. The folder structure is controlled in global settings and allows for different views on Client cases and external broker cases.

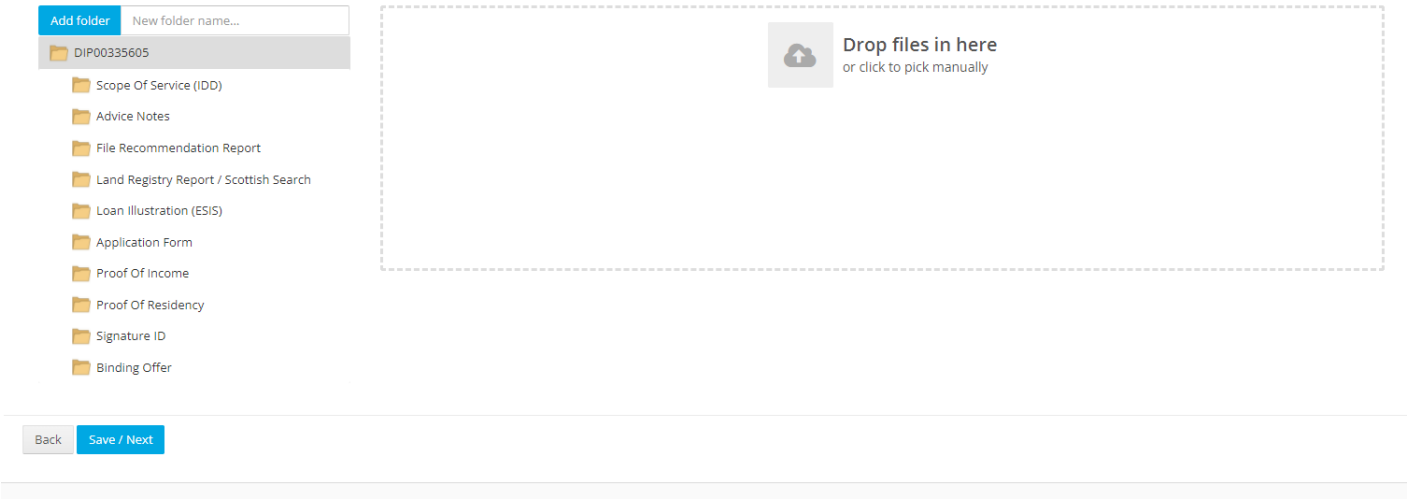
Fig 3 – Global Setting view



There is a built-in private folder section, that is viewable only to internal users.

The folder structure is only able to go to one level, no subfolders can be created

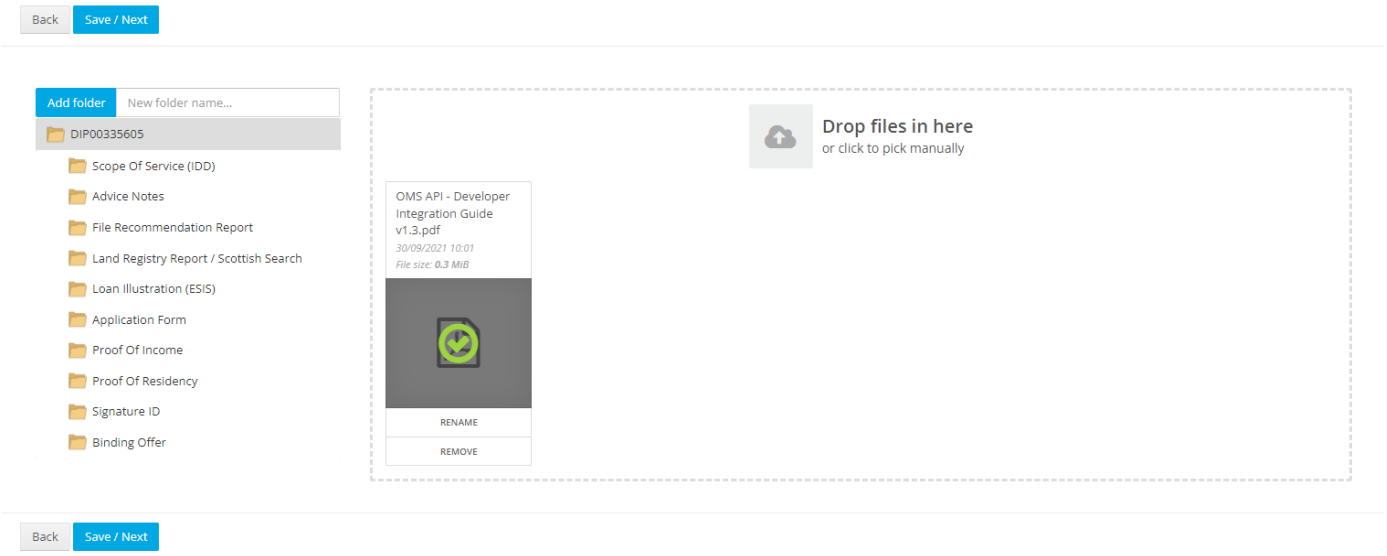
Fig. 4– Document Tab



The document facility allows for Drag and Drop e.g., from emails. You can also click in the file area to open file explorer.

Once a document is loaded, it will show in this section below.

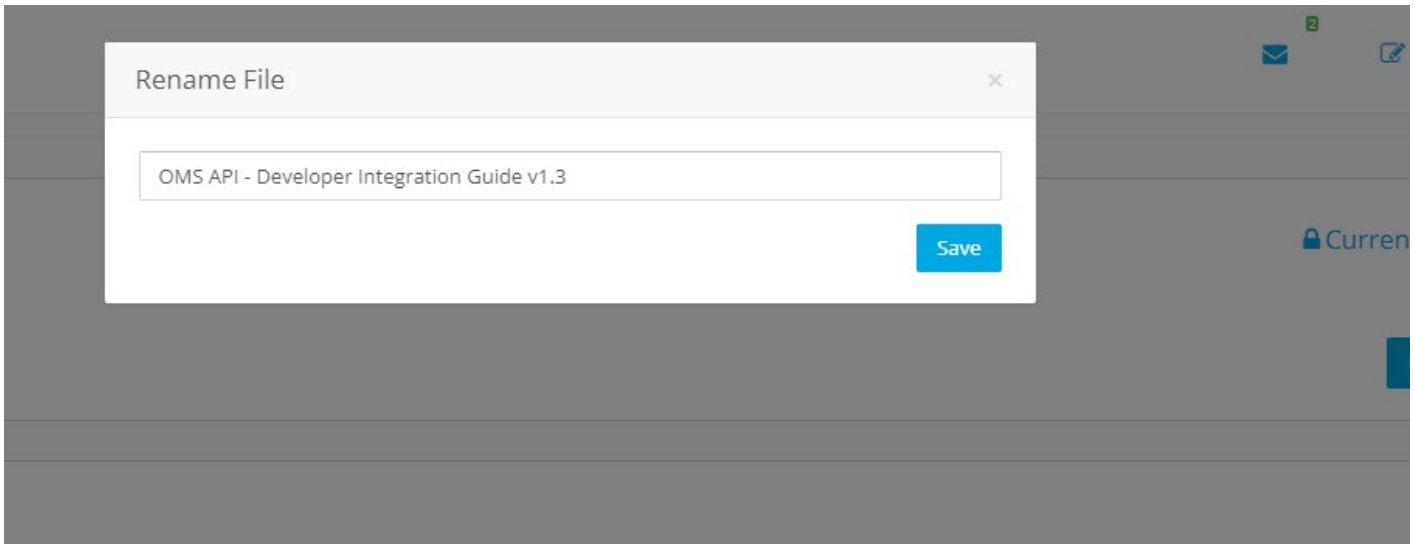
Fig. 6 – Uploaded Document



2.1 – Renaming Documents

On loading of a document, these can be renamed, by using the rename feature. Clicking this will open a popup window and you can rename the document as required. Once you press save, the document will be renamed.

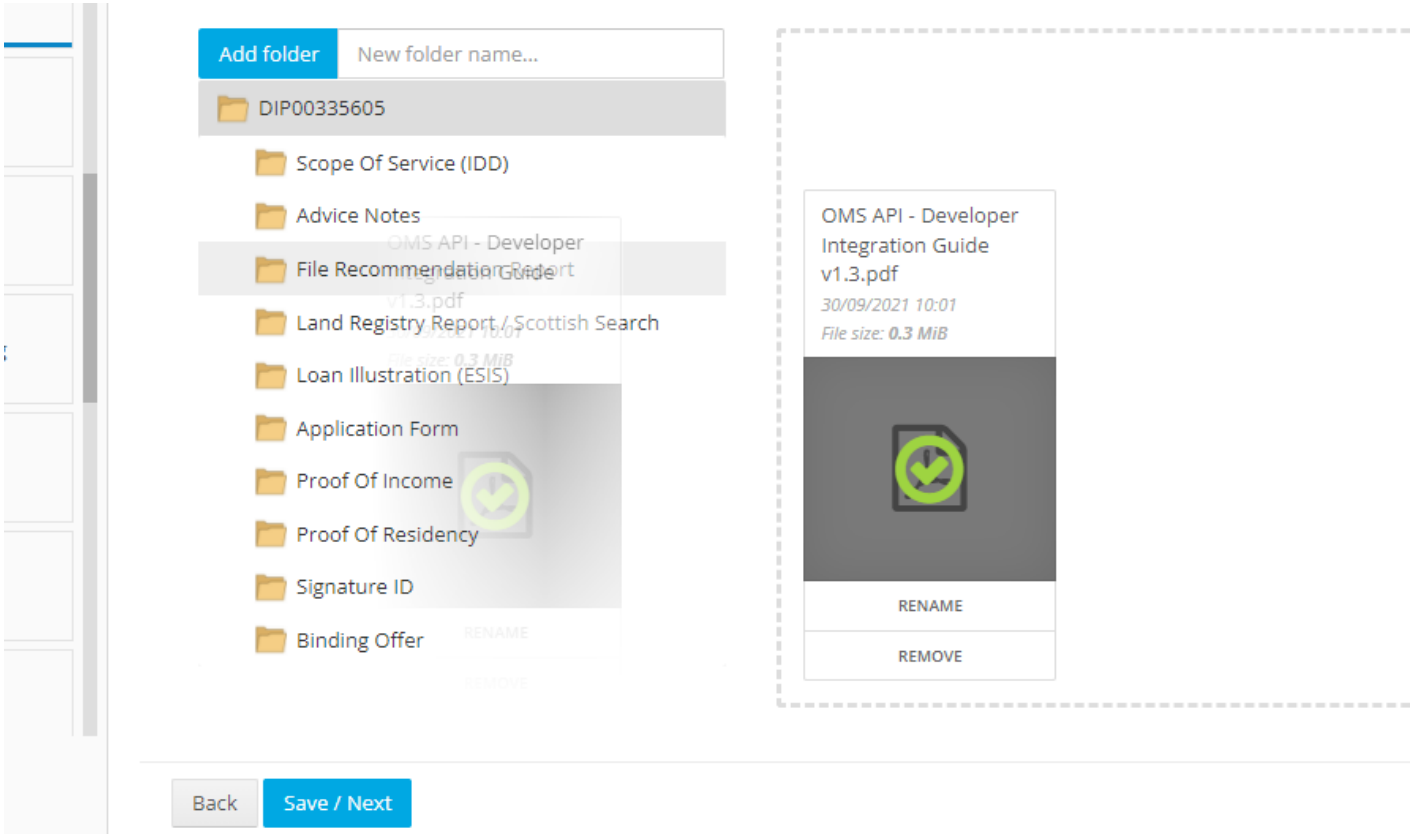
Fig. 7 – Renaming document



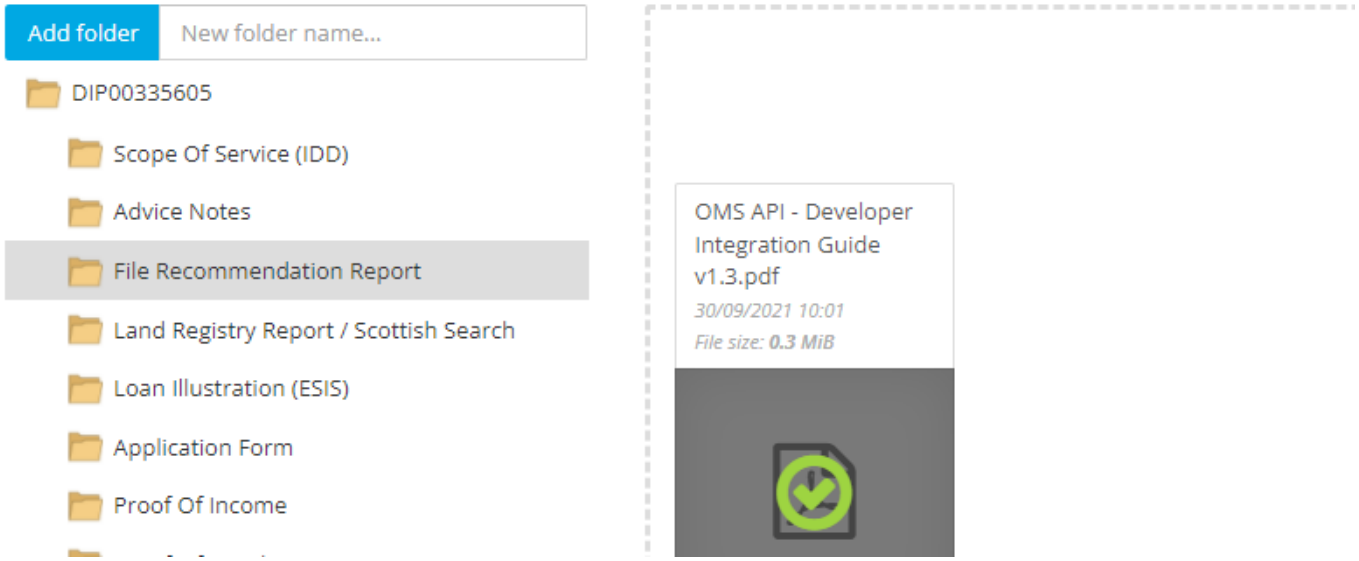
2.1 – Moving a Document

You can move documents that have been uploaded to the relevant folder if required. To do this, simply drag the document to the folder.

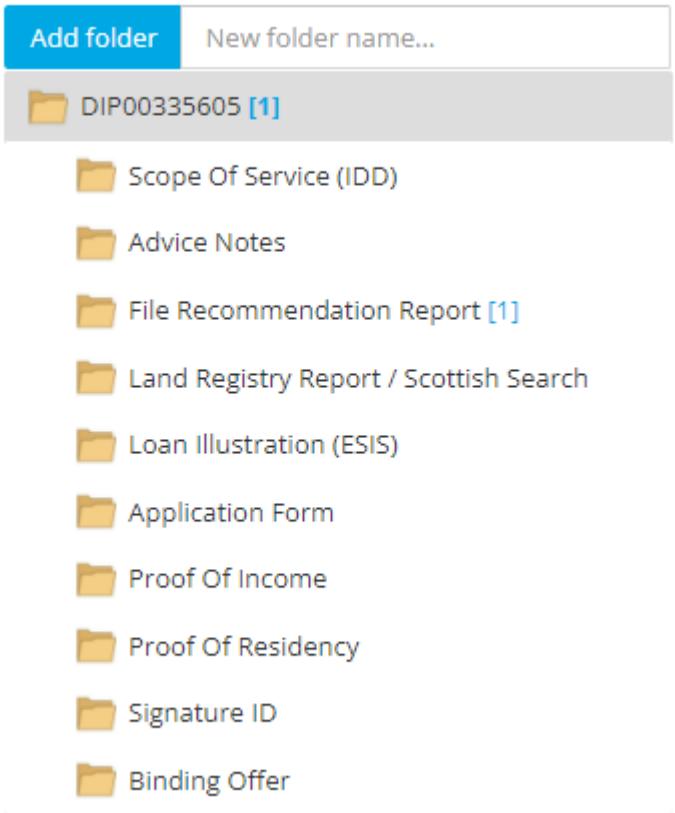
Fig 8 – Dragging a document



The document will then show in the folder selected.



Once saved, the folders will show the number of documents on the case. The top folder will show the count of all documents and the folders below will show how many of those documents are in each folder.

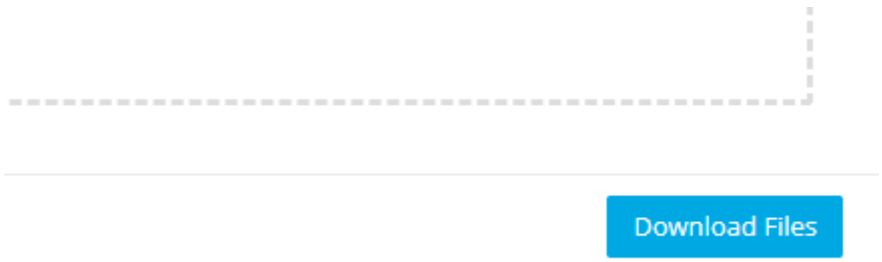


2.2– Opening a document

To open or view a document, simply press on the document and it will download for you.

2.3 – Downloading all documents

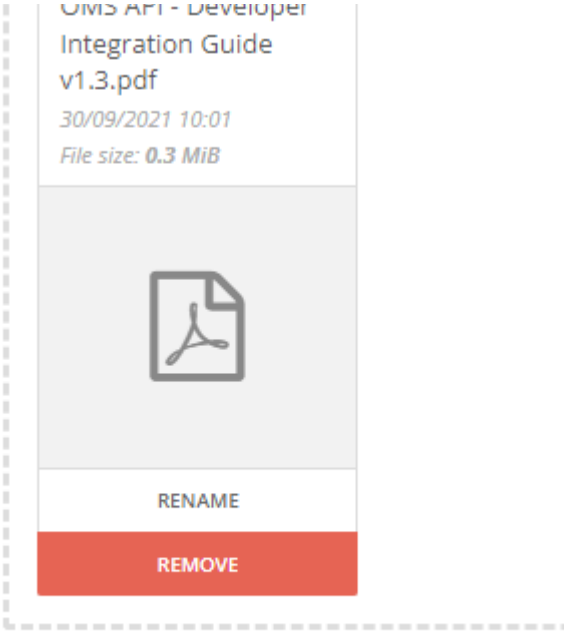
To download all files on the case, press the download files button. These will download to your device in a zip file for you.



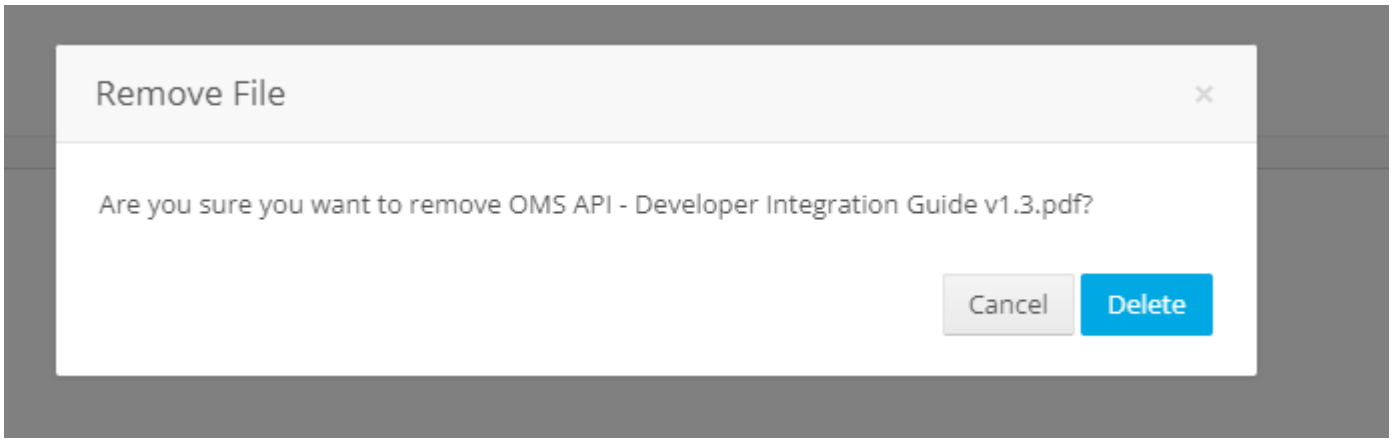
Please note this button only appears if there are documents on the case.

2.3 – Deleting Documents

This function is permissioned based. If the user has the right permissions, a Remove button will appear at the bottom of the document.



You will need to confirm that you want to delete this file.



On confirmation, the file will be deleted and a note will be added to the audit log to show who deleted it and at what date/time.