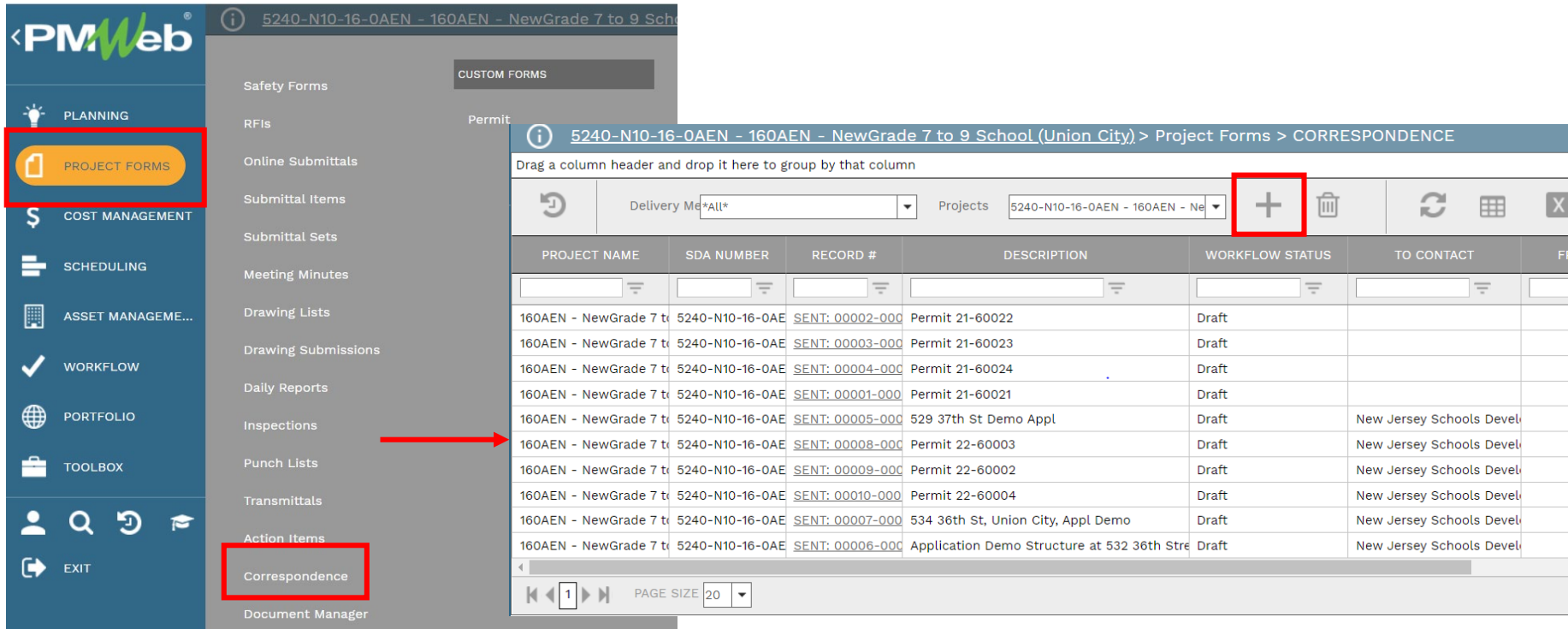# OPEN THE MODULE

- Choose **Project Forms -> Correspondence**
- This displays the **Manager View** for the module and shows all records.
- To search for a document to modify, use the columns to filter for the data you need. For example, use the Record # column to search for a document.
- To add a new document, click the **Add** button ☐

ADD A NEW RECORD

- Click **Add** to enter all relevant information in the **document screen**. Any field marked with an asterisk is a required field.
- Click the **Save** button when finished.

ADD DESCRIPTION

- Under the Main tab, enter the Description. Text can be formatted as desired.
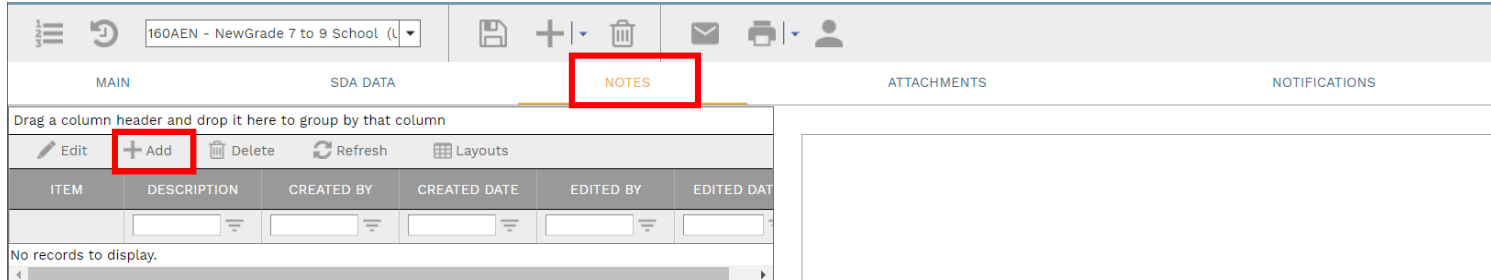- Click the **Save** button when finished.

ADD SDA DATA

- Under the **SDA Data tab, click** to enter more information about the correspondence.
- Click **Save** in the Header section when finished.

ADD ADDITIONAL NOTES
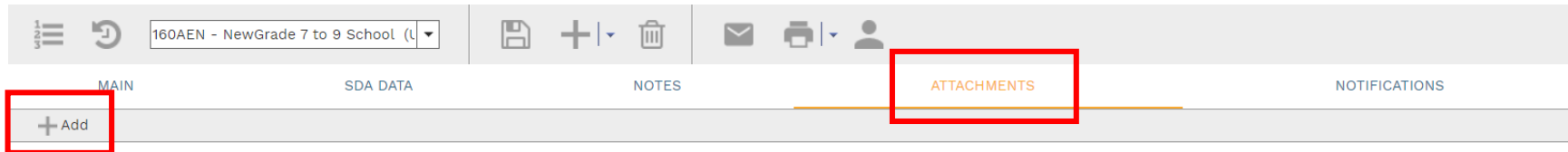
- Click **Add** on the **Notes tab** to add additional notes as needed. Click the **Save** button after each entry.

ADD ATTACHMENTS

- Click **Add** on the **Attachments** tab to add attachments (or drag and drop files). Click the **Save** button after each entry