



Alloc8 User Guide

Paperwork Emails for Companies

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Overview

This feature allows greater control over where Paperwork gets sent to.

When a Timesheet is submitted, the Timesheet and accompanying paperwork can now be sent to email addresses you nominate at a company level, as well as the site contact on the job. You can also choose to disable sending to the site contact on jobs for specific companies.

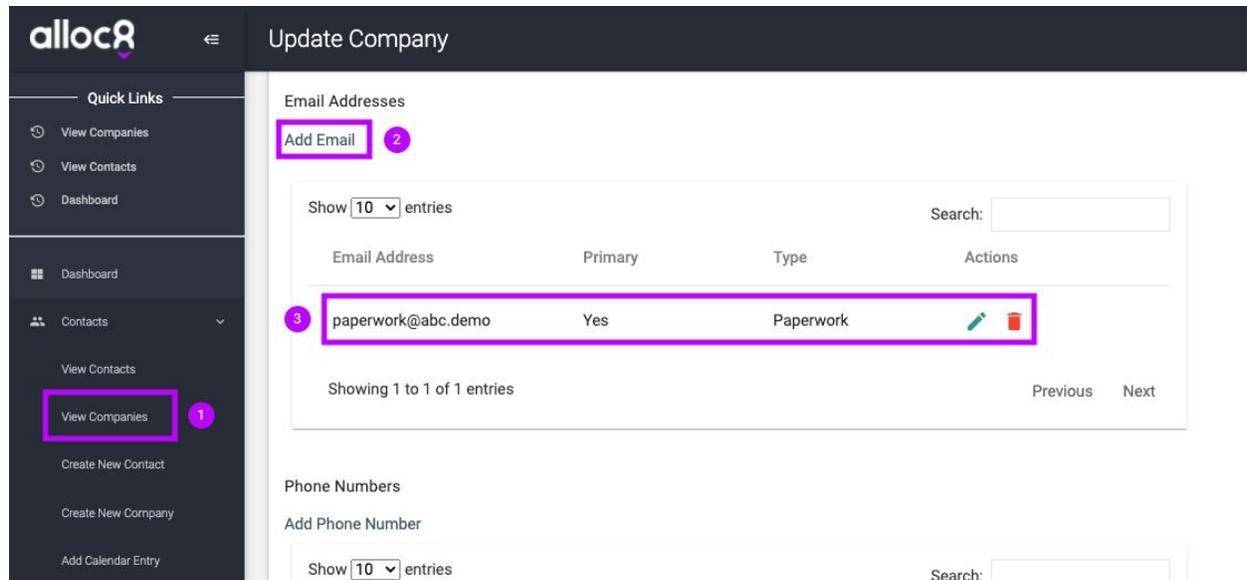
When is the Paperwork email sent?

The Paperwork for a job is emailed when the Timesheet is submitted for the first time, or when it is edited and resubmitted.



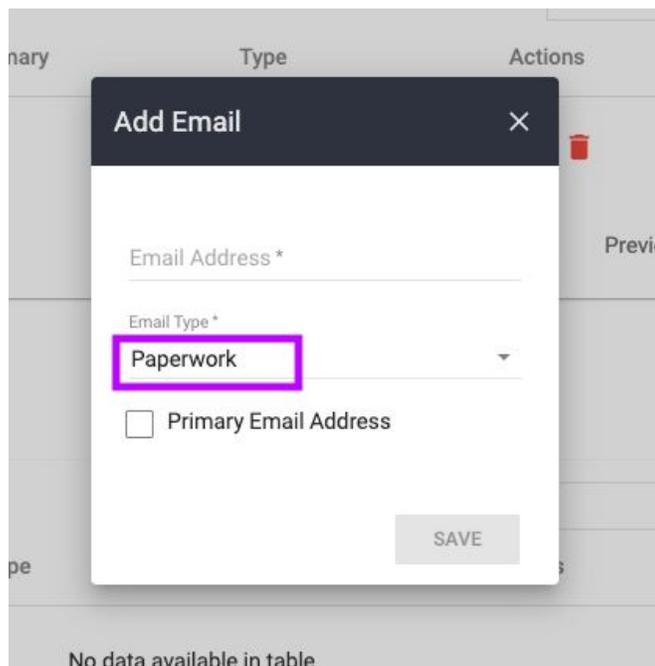
Adding Paperwork Emails to a company

To add new paperwork emails to a company:



Edit the company to add Paperwork emails

1. Go to **View Companies** > Edit the Company you wish to add the email to
2. Scroll down to **Email Addresses** and Click 'Add Email'. This will open a new dialog. Enter the email address and select 'Paperwork' as the email type.



3. The email will now appear in the list of email addresses. You can add multiple paperwork email addresses. Every 'Paperwork' email address will receive the Paperwork email.

Disabling 'Send Paperwork to Site Contact'

Paperwork is emailed to the nominated site contact on the job.

The screenshot shows the 'Create Job' form. The 'Job Details' section is active. The 'Site Contact' field is highlighted with a red box and contains the name 'John Smith'. Other fields include 'Enter Location*' (233 Castlereagh Street, Sydney NSW 2000 Australia), 'Job Start Date*' (28/01/2021), 'Job Duration*' (1), 'Job Start Time*' (9:00), 'Job End Time*' (17:00), and 'Length of Shift (hours)' (8.00). There are also checkboxes for 'Unconfirmed Date' and '24 - Hour Rotation'.

The 'Site Contact' selected on a job is emailed the paperwork when a Timesheet is submitted.

There is a checkbox on the company page in Alloc8 that says 'Sent Paperwork to Site Contact'. By default, this is checked ON for all companies, and any new companies you create.

If you do NOT wish to send the Paperwork emails to the Site Contact, simply uncheck this box. This will not send the paperwork email to the site contact on any job you do for that company.

The screenshot shows the 'Update Company' form. The 'Send Paperwork to Site Contact' checkbox is highlighted with a red box and is checked. Other checkboxes include 'Project is Mandatory', 'Purchase Order is mandatory', 'Email Invoices', and 'Mark as Inactive'. There are also dropdown menus for 'Travel Billing Preference', 'Charge for Employee Breaks', 'Charge for Equipment Breaks', 'Invoice Totalling Preference', 'Batch Invoices', 'Credit Type*', and 'Legal Entity Name'.

Important note if you have Paperwork Emails disabled in your portal:

There is a configuration option in Alloc8 to disable sending Paperwork emails entirely. If you are using this option, the 'Send to Site Contact' checkbox will still not send the Paperwork emails if it is checked, nor will Paperwork be sent to the nominated Paperwork emails at an individual company level. If you are not sure whether you are using this option, please speak to your Customer Success Manager.