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STANDARD OPERATING PROCEDURE

Subject Access Request Unit

REPS CONTACT DATABASE

Standard Operating Procedure No.	2.0
Revision No:	1.0
Original Date of Issue	1/04/2015
Revision Date:	22/04/2015
Revised by:	███████
Approved by:	

Background:

A need for this was identified by the FE Working Group members during the first quarter of 2015. A central, up to date document was needed, for all of SARU to access.

Purpose of SOP:

Provides SARU with instructions on how to use the Database correctly and maximise effectiveness.
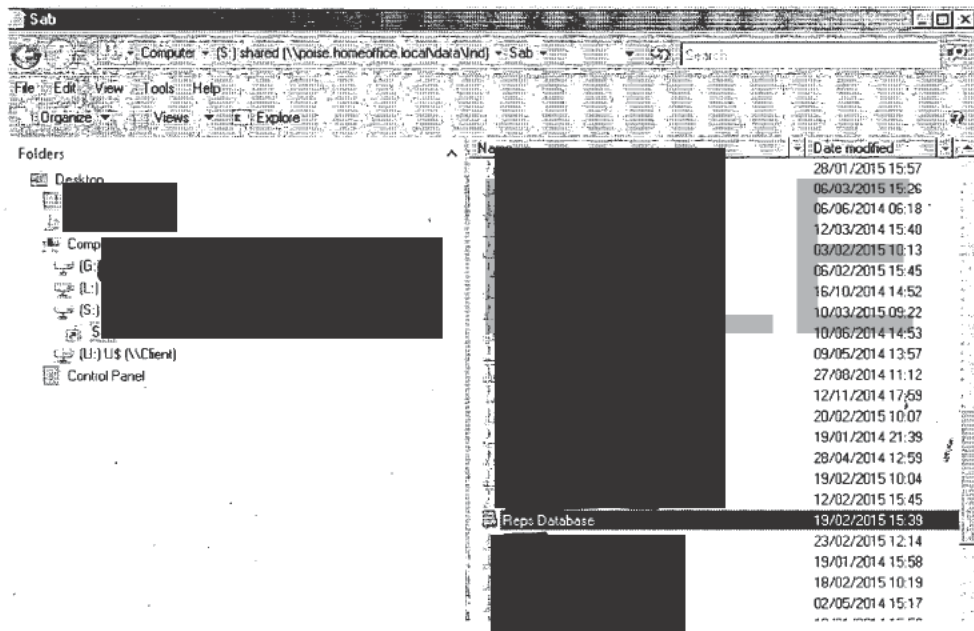
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Accessing the Database:

The database can be accessed from the SAB drive, just scroll down to the Folder called Reps Database and the document is in there.

From the shared Folder, open the 'Rep's database' document by double clicking the title. Or by clicking on this link:

Reps Database (Live Document).xlsx

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Form Database

Ready

Once open click the '*Form*' tab.

The previous search result will be displayed see below:

Reps Database

Representative:

Rep Closing Date:
N/A

Address:

Rep Amalgamated To:
N/A

Phone Number:

Email Address:
N/A

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Searching the database:

1   Type in the name of the rep in the 'Representative' box
2   Click the drop down arrow to the right of this box.

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A list of possible results is displayed:

Reps Database

Representative:

Address:

#N/A

Rep Closing Date:

#N/A

Rep Amalgamated To:

#N/A

Phone Number:

#N/A

Email Address:

#N/A

Select the correct rep by clicking on it from the drop down list.

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Updating the database:

Unlitled - Message (HTML)

Message   Insert   Options   Format Text   Adobe PDF

This message has not been sent.

Send

To...

Cc...

Subject: Update Reps Database

Change of address
XY2 Solicitors
123 The Road, Townley, Kentshire VR1 3ZZ

Please don't forget to use
'Update Rep's Database'
in the subject line.

Kind regards

The database is read only access. If you find a rep's contact details are out of date, or are not on the database, email as above.