How do I create / edit a Reminders Letter Template in Best Practice Software?

This FAQ is intended to answer common questions about creating a template to be used for Reminder letters.

Open the 'Word processor' from the Best Practice main menu by selecting the ☐ icon, **F4** key or selecting **Utilities > Word processor** from the menu.

> ☁ **Tip:** There are a wide range of F.A.Q. documents accessible by browsing to the \FAQ folder on the Best Practice installation DVD.

Create a new Reminder Letter.

When creating a reminder letter, you should decide whether you wish to have a 'generic' letter that would be suitable for all reminder reasons or whether you wish to have a 'reminder specific' letter with wording to suit a particular reminder.   Below we have outlines how to create a 'generic' letter which is similar to the reminder letter supplied by Best Practice.

Select **Template > New Template** from the Best Practice Word Processor main menu. A blank document will be displayed.   Create and format the letter as required.

Use the Template fields where you want the system to automatically insert information (i.e. patient name, DOB, reminder reason, etc) .

When creating a 'generic' template, be sure to use the template field <ReminderReason> so that it will populate this field for you.

To Save the Template choose **File >**

Save as or select the 🖫 icon to save the Template.

The **'Template Detail'** dialog box will be displayed. Enter the name of the template.

 Be sure to tick the box '**Available to all users'** if other users will be using this template.
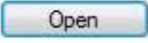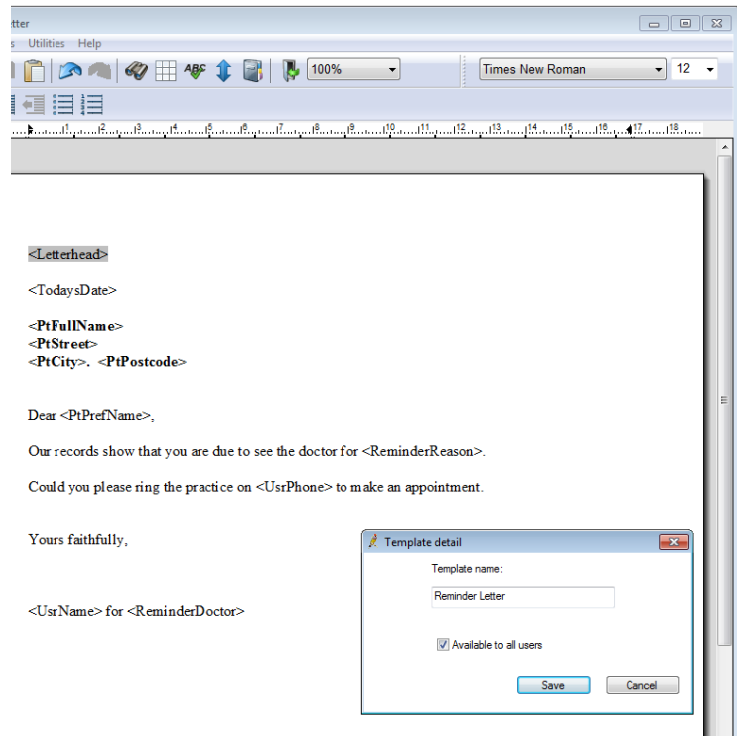
Edit a Reminder Template Letter

Select **Template > Edit Template** from the Best Practice Word Processor main menu.

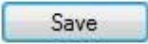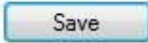Highlight the Reminder letter to be edited and

press the ⬚ Open button.

Change the required text in the reminder letter to suit your requirements. You can also add new template fields or replace existing template fields as required using the tree to the left hand side of the screen.
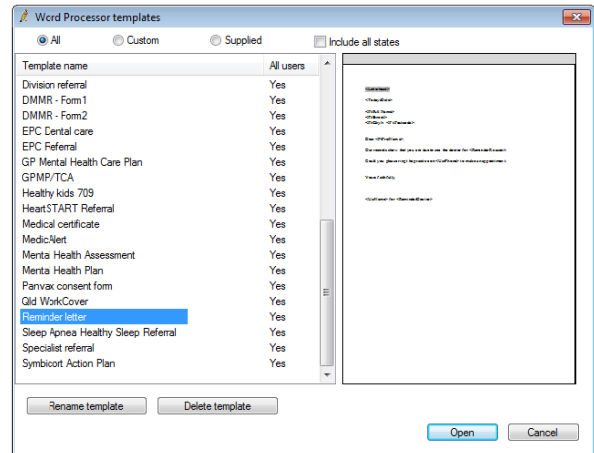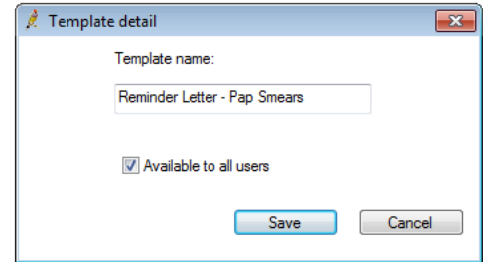
Save the template

To Save the Template choose **File > Save as** or select the 💾 icon to save the Template.

The **'Template Detail'** dialog box will be displayed showing the previous name for the template.

- To save as current name: Press the ⬚ Save button.

- To save with a new name, type the new name into the

  'Template name' field and Press the ⬚ Save button.

Be sure to tick the box '**Available to all users'** if other users will be using this template.

> ☁ **Tip:** Best Practice will not allow you to save changes to a 'supplied' template. The system will prompt you for a new template name. Be sure you advise relevant staff of the correct template to be used.

MORE INFORMATION

For more information consult the Best Practice Help Library or contact us via our

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Last Reviewed: **07/03/2012**