

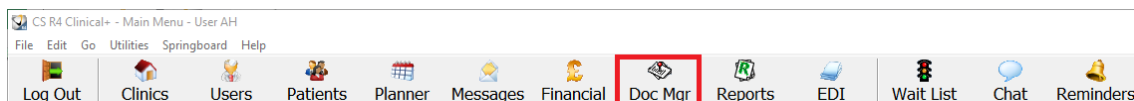
CS R4+

How to Create and Edit Letter Templates

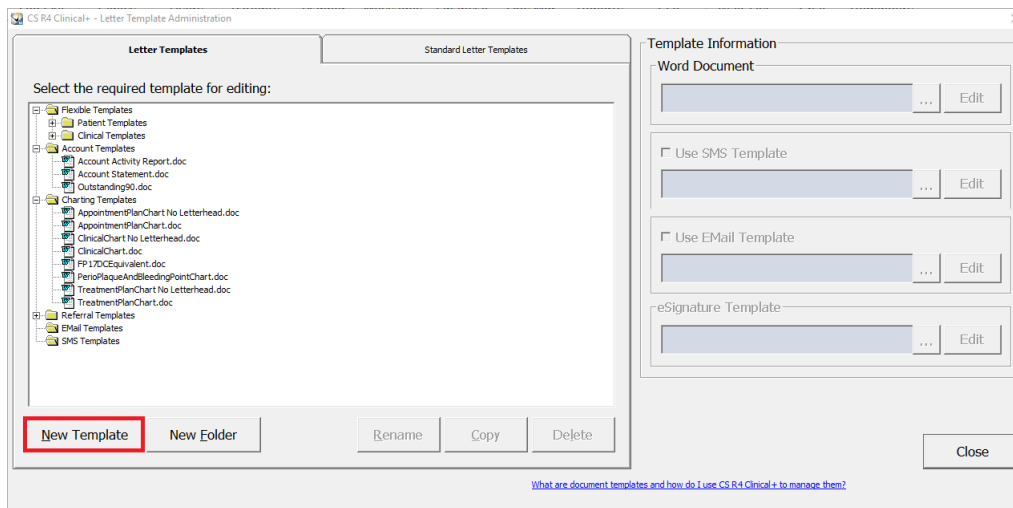
This 3-page handout is aimed at all staff members and shows how to create new letter templates and edit existing letter templates in CS R4+ practice management software.

Creating a New Letter Template

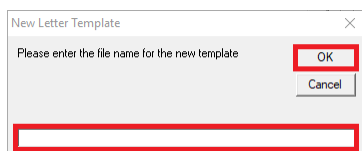
- 1 From the **Main Menu** screen, click **Doc Mgr**. The **Letter Template Administration** window is displayed.



- 2 Select the relevant folder where the new letter template is to be stored and click **New Template**. The **New Letter Template** window is displayed.



- 3 Enter a name for the new document and click **OK**. The **MS Word** window is displayed.



- 4 Create your letter as required by typing the text directly into the document.

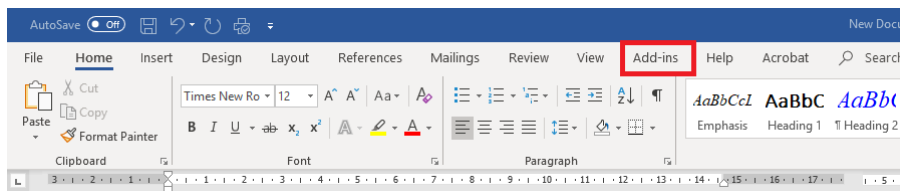


Note: You can also copy and paste text from another document into your new letter, if required.

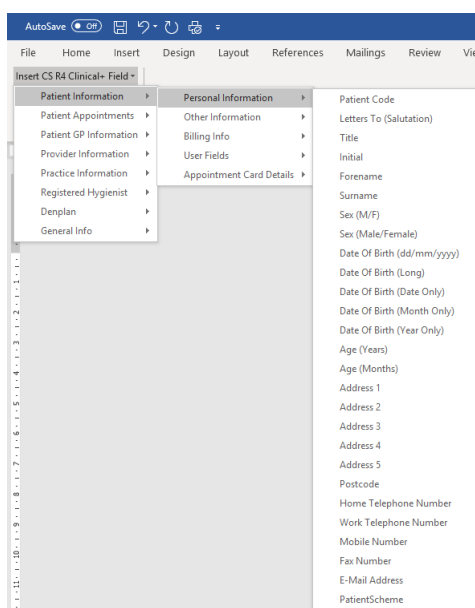


How to Create and Edit Letter Templates

- If you wish the template to automatically insert data from CS R4+, such as the patient's address, the patient's address or date of their last appointment, then click **Add-Ins** from the top menu to display the **Insert Clinical+ Field** toolbar.



- Select the required fields and insert them as required into the letter.



- Once the letter has been completed, save the letter and exit from MS Word.

The letter can now be sent to any patient either directly from their Comms Tab or by using the Mail Merge function on the Patient Selector window.



Note: You can also replace the default header with your own logo if you have a copy of it in a valid format.

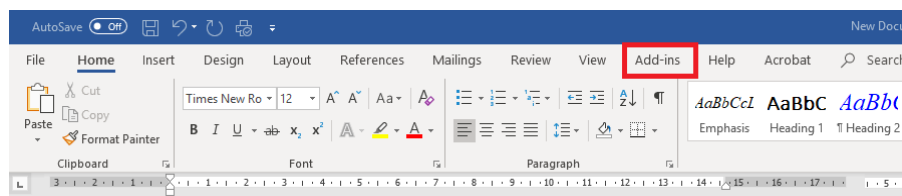
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Editing a Letter Template

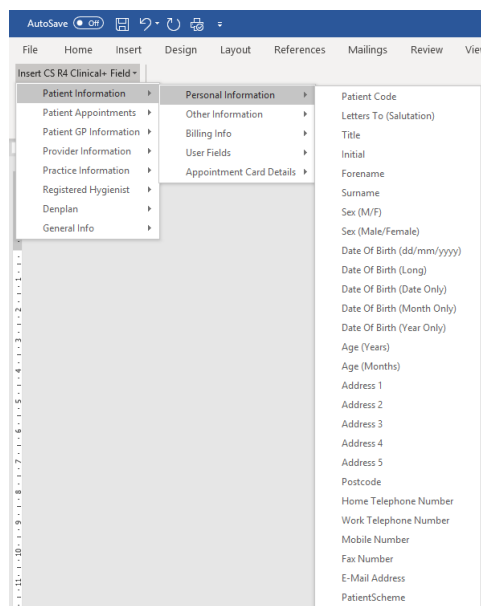
- 1 From the **Main Menu** screen, click **Doc Mgr**. The **Letter Template Administration** window is displayed.



- 2 Select the letter that you wish to edit and double left-click to open the document.
- 3 Edit the text as required.
- 4 If you wish the template to automatically insert data from CS R4+, such as the patient's address, the patient's address or date of their last appointment, then click **Add-Ins** from the top menu to display the **Insert Clinical+ Field** toolbar.



- 5 Select the required fields and insert them as required into the letter.



- 6 Once the letter has been completed, save the letter and exit from MS Word.

This revised letter can now be sent to any patient either directly from their Comms Tab or by using the Mail Merge function on the Patient Selector window.