

Template Import Instructions for practiX (PLEXUS)

Download and save the template in to a directory on your server/computer. The template will be in a word (.doc) format and has mail merge fields to populate the template from your clinical data.

1. Find the template on our web page
 - 1) Click on the template
 - 2) Select the save option
 - 3) Save the template to your server/computer

Importing a Mail Merge template

2. From the practiX main menu
 - 1) Click Administration
 - 2) Double Click System Configuration
 - 3) Double Click Templates
 - 4) Double click Register Document Templates.
 - 5) Select Letter/Document in the Template Type box

Register Document Templates

Template Type: Letter/Document Template Include inactive templates

Select a Template: [Empty]

Template Name: Generic Referral

Document Filename: Generic Referral.doc Inactive

Use Within:

Referral Sent	<input checked="" type="checkbox"/>	Document Sent	<input type="checkbox"/>
Document Received	<input type="checkbox"/>	Summary Document	<input type="checkbox"/>
Other Document	<input type="checkbox"/>		

Buttons: Close, Template Tree, New, Save, Cancel, Edit Template, Merge Fields

- 6) Click on the New button.
- 7) Click Select
- 8) Navigate to the downloaded template location from step 1
- 9) Double click on the template
(Word will open the template and if Word remains in full screen then minimise word)
- 10) Type a meaningful template name
- 11) Click the Referral Sent Box
- 12) Click Save
- 13) Click close

Now exit back to the main menu and test the template works.