

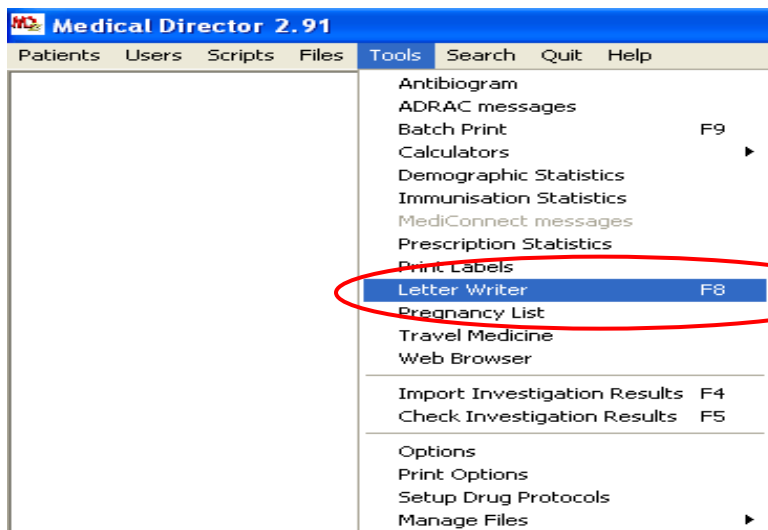
Cheat sheet: Medical Director

Create templates

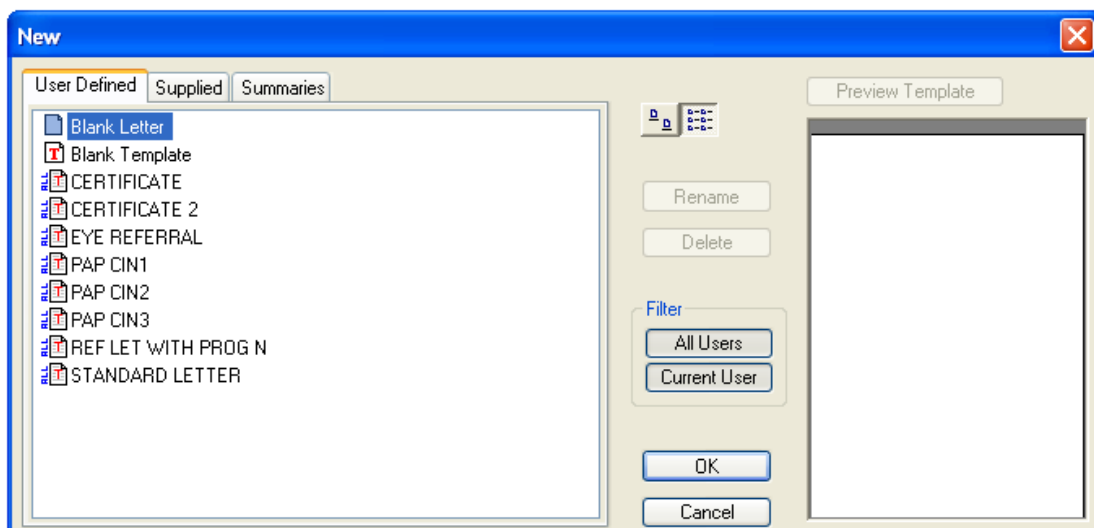


Create templates/letters

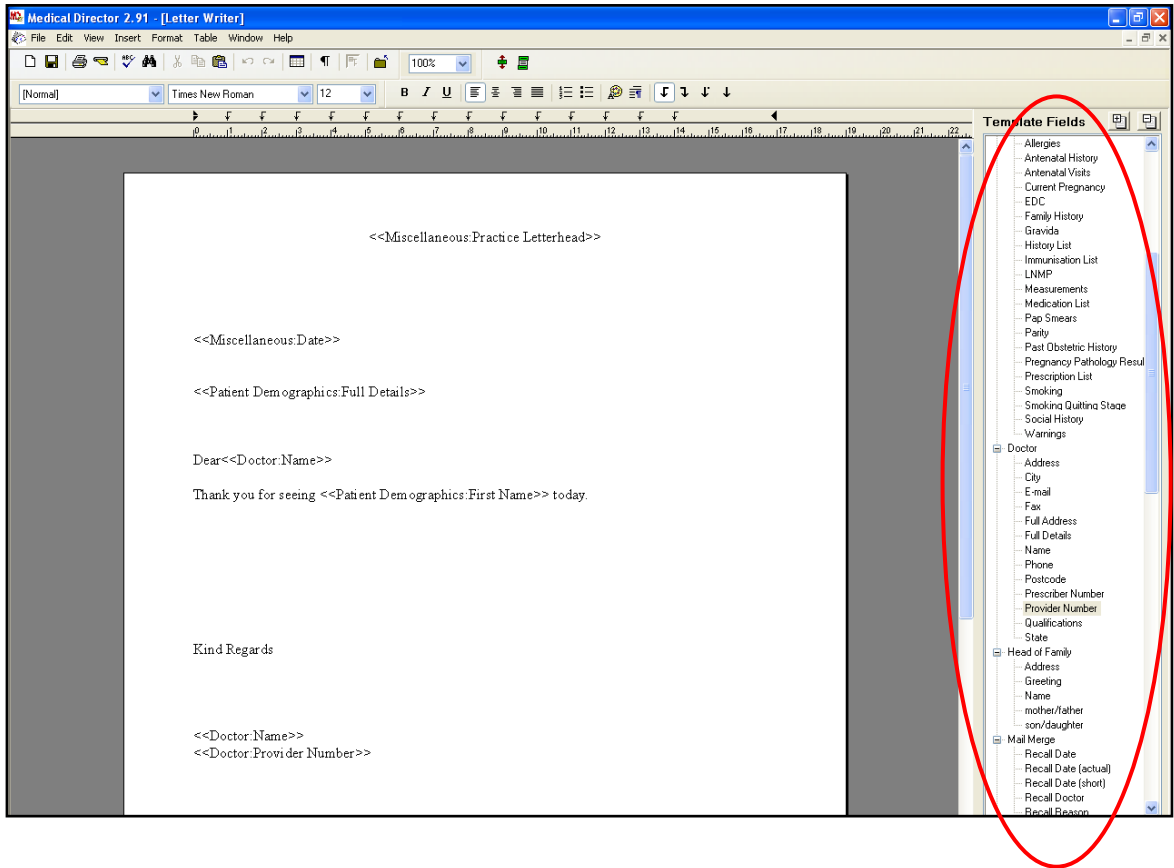
1. From the main menu, Select **Tools**, then select **Letter Writer** (shortcut – F8).



2. Open a new template – go to File in the menu, then select **New**.
3. Select **Blank Template** then **OK**.

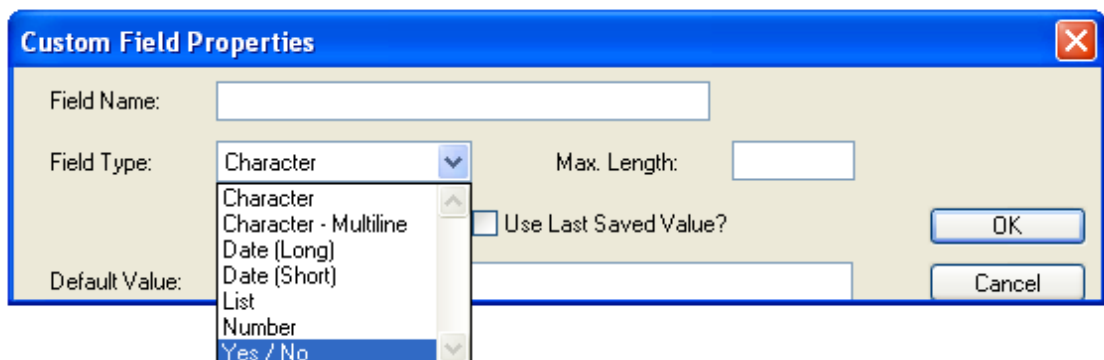
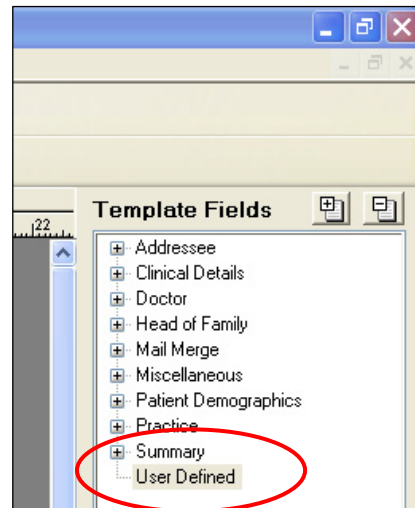


4. Type your letter. To add a 'merge' field (an item that will be populated from your data when opening the new template), select from the Template Fields list on the right (double click to add).



5. You can also create new fields that are not in the list provided. To do this, find **User Defined** field at the bottom of list and double click.

A **Custom Field Properties** window will pop up. Alter the characteristics of your new field here. For example, you can make the field a list, Yes/No or number field by selecting from the drop down menu next to **Field Type** and can add a description in **Field Name**, e.g. Pathology Test.



6. To save your new template, go to **File**, then select **Save**. Name the document and **Save**. Close the document (and the writer) and you have created your template for Medical Director.

