

Get the most out of



Letter Template User Guide



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Introduction

FLEX will produce any letter, email, or SMS that you need to send to a patient. This is completely customisable within the setup menu within FLEX in the first instance. These are setup in an interface which is similar to Microsoft Word.

To setup, the templates go to:

Menu > Setup > Communication > Letter Template (Email or SMS depending on which you want to setup)

• To open an existing template, either double click on the one from the list, or highlight the line and click on **open** at the top of the window on the blue bar.

c 🗸 Close	New	💪 Open 📗	Delete (🖉 Attachment	Downlo Templa	oad ites				Backgrounds (Docmail)
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p Staff / Roles	Groups									
is Patients	Filter by Group	All								<u>~</u>
Examinations	Template List									
II Cabaaraa	Group	q [‡] Name <	💐 Last Edited 🔍	🕈 Size 🔍 🕈 Attachi	ment 🔍 🕈	Colour [‡] Di	uplex [‡] 1st Class De	I. Shortlist ST	Shortlist CL	Background
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Appointments	Recall	Rem2	10/06/2014 (15:16)	5.11 KB			- r	Г	Γ	
o Orders	Recall	Child1	10/06/2014 (15:17)	3.18 KB			- r	Г	Г	
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a Communication	Recall	CLS2	10/06/2014 (15:18)	3.08 KB			- F	Г	Г	
	Recall	Diabetic1	10/06/2014 (15:19)	2.86 KB			- r	Г	Г	
	Recall	Diabetic2	10/06/2014 (15:24)	2.84 KB			- r	Г	Г	
Email Templates	Recall	Glaucoma1	10/06/2014 (15:27)	2.84 KB			- r	Г	Г	
Forms	Recall	Glaucoma2	10/06/2014 (15:27)	2.84 KB			- F	Г	Г	
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9 Online Forms	Patients	Px Rx Handout	07/04/2022 (16:05)	14.26 KB		Г I	- r	Г	Г	
Postcard Templates	Patients	Gos 18 Referral	06/05/2021 (11:52)	36.92 KB		Г Г	- F	Г	Г	
SMS Templates	Patients	CL Specification Handout	06/05/2021 (11:52)	15.59 KB			- r	Г	Г	
Template Groups	Patients	Contact Lens Record Card v4	08/12/2021 (16:18)	22.86 KB		Г I	- r	Г	Г	
L	Marketing	Marketing	05/01/2022 (10:51)	692 bytes		Г I	- г	Г	Г	
Till	Patients	PX Record Sam	09/05/2022 (12:07)	17.11 KB			Г	Г	Г	
System										\bigtriangledown

• This is an example of how FLEX uses << Merge fields>> to retrieve information.

Close	Rem2
Branch	Home Insert Display Table Mailmerge
Staff / Roles	Den 🔜 Save - K Close Find Selata Layout 🗽 Print Preview K Cut - Paste Den Selata Layout Replace Replace Selata Layout Check
Patients	File Page Edit
Examinations	
Schemes	
Appointments	
Orders	
Stock	
Communication	 «PatSalutation» «PatAddress»
Email Templates	Date: «Today» Ref.«PatUserRef»
Letter Paragraphs	Dear «PatSalutation»
Letter Templates	
Online Forms	According to our records your last sight test was on «TesDate».
Postcard Templates	
Template Groups	You are now <u>overdue</u> for an eye examination.
Till	It is very important to be up to date with your examinations as they play a part in your
System	

New Letter Template

Click on



• The word processing screen will now be available

Close	Unsaved Document
Branch	Home Insert Display Table Mailmerge
Staff / Roles	🕼 Open 🔜 Saive - 🔨 Close 🚔 Layout 💊 Print 🎦 Preview 🐇 Cut 🦨 Paste 💭 Find 🍡 Replace 💀 Spell
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Template Groups	- -
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- Across the top of the window, there are Home, Insert, Display, Table and Mailmerge. These functions are similar to what you would experience in any other word processor, including a mail merge facility
- Margins, formatting, copy, cut and paste etc can all be changed in the same way as they can in other word processing software such as Microsoft Word.

Mailmerge

• The purpose of Mailmerge is to insert details from a patient's record when the letter is run. (Example below)

Home Insert Display Table Mailmerge Home Insert Display Table Mailmerge Open Save Close Print Preview Cut Paste Paste Find Sever Rep File Page Preview Cut Paste Edit Edit Edit Miss Heath Optinet Optinet DOB:01-01-2000 22 Sam 32 Church Street G.P: Diabetic (d) More Tel: Malvern WR14 2AZ Glaucoma (g) Family Glaucoma (f) Family Glaucoma (f)	
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File Page Edit * •	lace AF Spell Check
Miss Heath Optinet DOB:01-01-2000 22 Sam 32 Church Street G.P: Home Tel: Malvem Diabetic (d) Work Tel: WR14 2AZ Glaucoma (g) Family Glaucoma (f) Framily Glaucoma (f) Cataract (c) Cataract (c)	
Image: Control of the state of the stat	
Miss Heath Optinet DOB:01-01-2000 22 Sam 32 Church Street G.P: Home Tel: Malvem Diabetic (d) Work Tel: WR14 2AZ Glaucoma (g) Mobile Tel:PatTelephoneM Family Glaucoma (f) Examined by: Optinet Staff Cataget (c)	1 1 19 1 1 20
Member Voucher (v) Last Test: 17-03-2022 Reason NI No NI No PREVIOUS RX VDU User Yes without Rx T R: L: Occupation Converg/Accom - OMB - CT-FD -	
SV (DV / NV / Int) / Bif / Vari / 2 pairs / MAR / Reactolites / Tinted Mobility Date	
History & Symptoms -	
Notes: R: D D.H V	Ť
- IIA	

How to use the Mailmerge function

• Using the Word Processing screen above, click on the **Mailmerge** tab across the top.

			PX Record	Sam				
Home Insert Display Table M	ailmerge							
🔎 Open 🔛 Save - 🗡 Close	Ă Layout	Print	Preview	🖌 Cut	🥜 Paste , Select All	Find	Replace	ABCY Spell Check
File			_	сору	, Select All	Edit		

- Type the text you want within your document. Then add the fields as you go through.
- These are found within the **Database** and **Mergefields** dropdowns.
- Dependant on which part of the Database you want to get the information from will depend on which fields will be shown in the **Mergefields** dropdown.
 - For example, I have chosen the Patient part of the database, therefore the list of fields are as below:

Close	Unsaved Document
Branch	Home Insert Display Table Mailmerge
Staff / Poles	Database Mergefields
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Examinations	[*] $\blacksquare \blacksquare ■ \blacksquare ■ \blacksquare $
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Appointments	N Patholics5
Orders	PatAge
Stock	PatAlxAddEndDate
Stock	Pathdadate Pathdadate
Communication	PatAltMonthsActive
	- PatAltOriginalAddress
Email Templates	- Patber0f8irth
Forms	PatDeceased
Letter Paragraphs	PatDeceasedDate
Letter Templates	n PatDeceasedX
Doline Forms	PatEmailAddress
Postcard Templates	PatEntitlement
SMS Templates	PatEthniaty
Template Groups	
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System	- - - - - - - - - - - - -

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Adding a Mergefield

o Click on the field you want to add to your document, then click either:

Field + CR (this will put in the field name plus a carriage return) or field (this will NOT put in a carriage return)

• Once the document has been created, click **Save.** Name the Document and put it into a Group.

\checkmark	Save	Save Letter	X	Cancel
Give	e your docum	nent a name:		
	Description	Test Document		
	Group	Patients	•	
		Care Home		
		Clinical		
		Contact Lens		

• The examples below show how the template will look once created and then once it has been run on a patient record.

4		L 23 - 1 - 2 - 1 - 2 - 1 - 2 - 1 - 2 - 1 - 2 - 1 - 3 - 1 - 4 - 1 - 5 - 1 - 4 - 1 - 5 - 1 - 4 - 1 - 7 - 1 - 8 - 1 - 9 - 1 - 20 - 1 - 21 - 1 - 22 - 1 - 23 - 1 - 24 - 1 - 16 - 16 - 16 - 16 - 16 - 16 - 16
	Template	<pre>«PatFirstname» «PatSurname» «PatAddress1» «PatAddress2» «PatAddress3» «Today.FullDate» Dear «PatSalutation»</pre>
4	Letter when run	Sam Heath Optinet 32 Church Street Malvern 12 May 2022 Dear Miss Sam Heath

Mergefields Tips

- AppSlot: Enter the appointment date and time
- **Branch**: useful for entering practice details, such as the address and telephone number.
- **Doctor**: Enters the name of the Doctor you are writing to and the **Surgery** if entered.
- **General**: Useful for entering today's date, or **"Ask** facility, which will pop up and ask which date should print or which Optom should be used.



	Test Document				
Home Insert Display Table Mailmerge					
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	e Optometrist	٩٠			
	Mr Optinet Staff Member	<u>^</u>			
	Mr Outside Rx				
	Mrs Optom One				
	Ms Sam Heath				
	Ms Sam Jones				
					7
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- Patient: Enter details about the Patient, such as their address and phone number. Note that titles are found under Title
 Test: Test details, such as the Date, Optom and
- Recommendations/advice are found here. Use in tandem with:
 TestRx: The Prescription details. These merged fields are all fairly obviously titled e.g TestRxDisLeftCyl. Please contact support if you need assistance.

Docmail

If using Docmail to manage your correspondence, note that you can attach other documents to the template you are wanting to send. This would be useful if, for example, you are sending out offers or a newsletter for example. By attaching the document to the template Docmail will be able to print and send both out for you.

How to add an attachment

- Menu > Setup > Communication > Letter template
- o Click on the document you want to add an attachment to highlight it.
- Click on the **Attachment** button on the blue bar at the top of the screen.
- Select the PDF you want to add
- o Click open
- The attached document's name will then be visible as below. This will, when sent to document through the patient record, be printed and sent as well.



Download Templates

Also, across the top in the blue bar, there is a button called **Download Templates**. This will show any templates that are available to be added to FLEX.

- Click on the one to be downloaded.
- Flex will allow you to change the name and which group you want the template to be available within.
- The document will then be available to select when required through the patient's file.

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