



Get the most out of



Letter Template
User Guide

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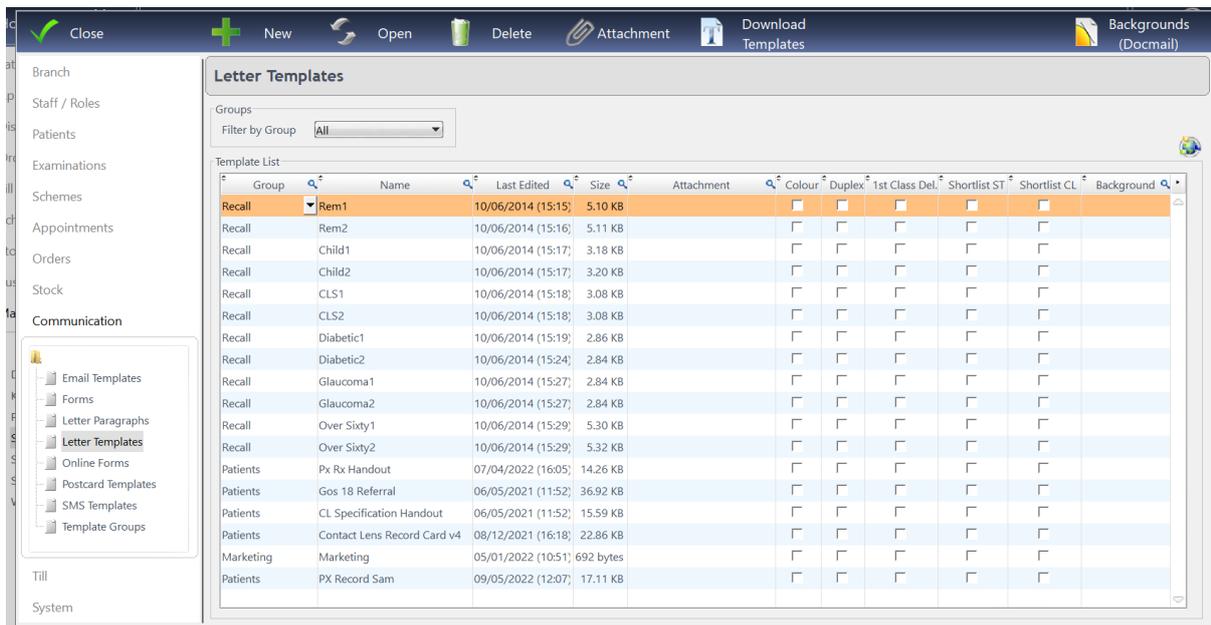
Introduction

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.

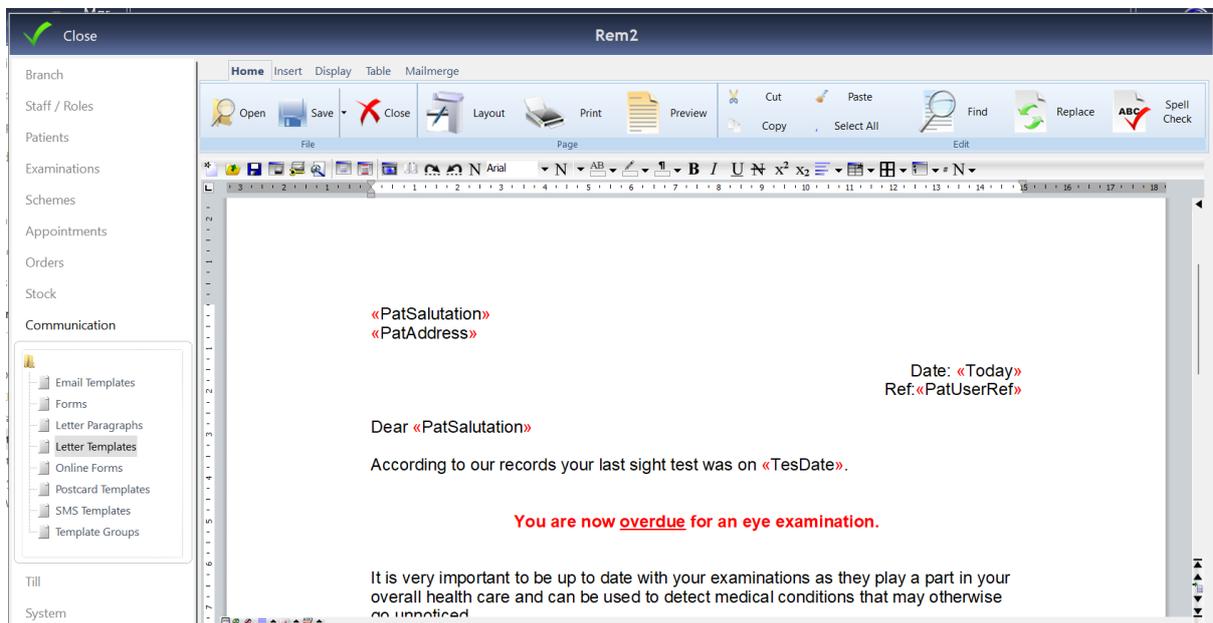
To setup, the templates go to:

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

- o 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.



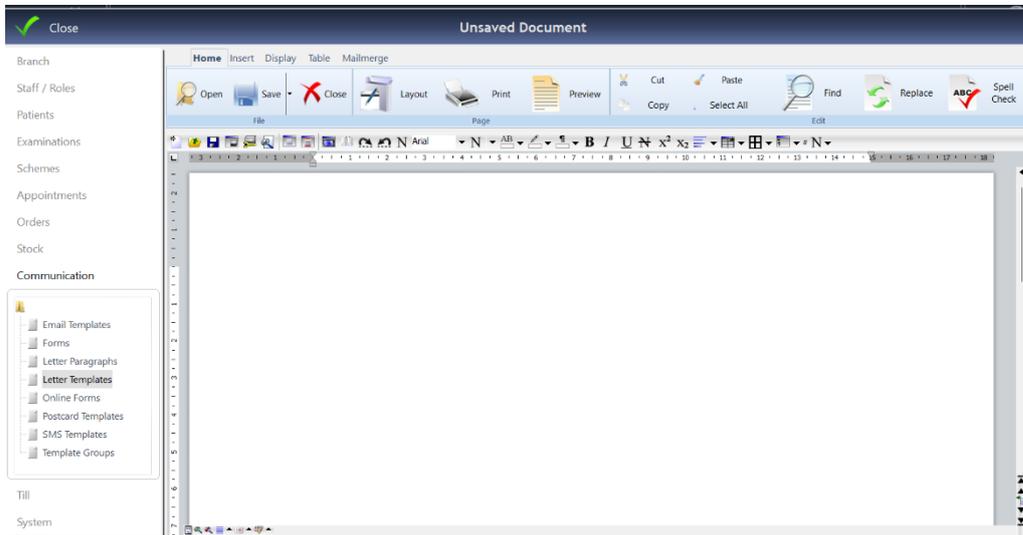
- o This is an example of how FLEX uses <<Merge fields>> to retrieve information.



New Letter Template

Click on 

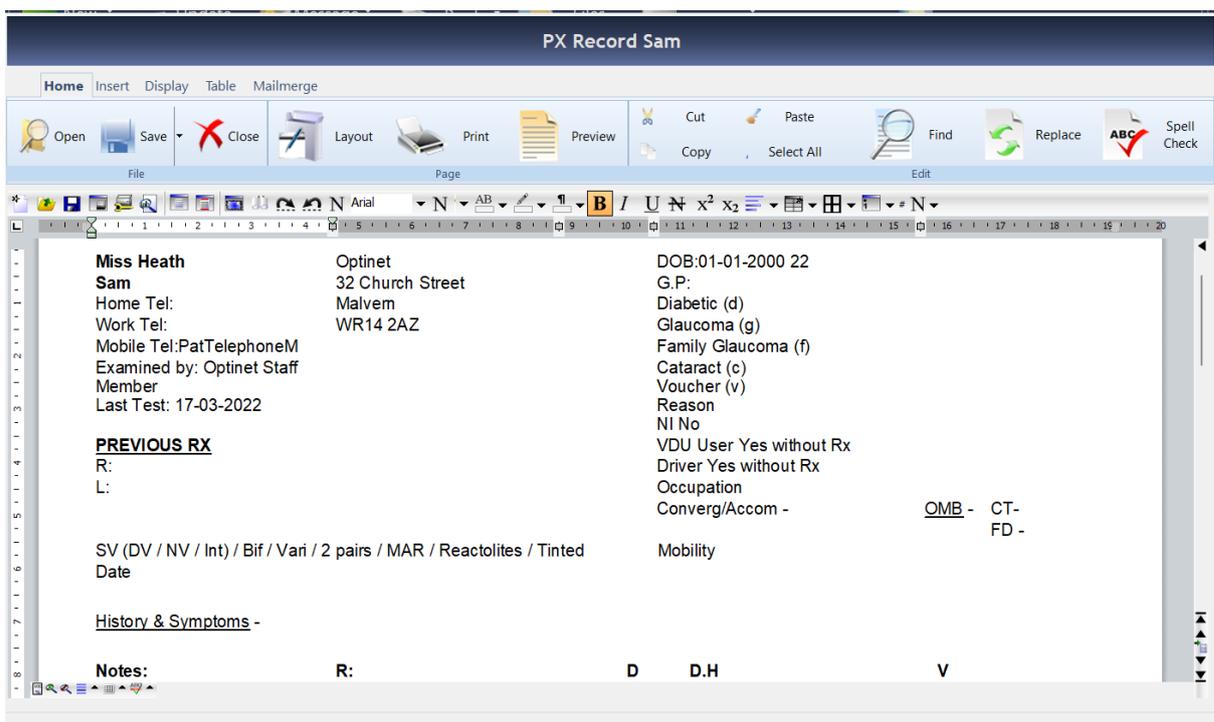
- The word processing screen will now be available



- 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)

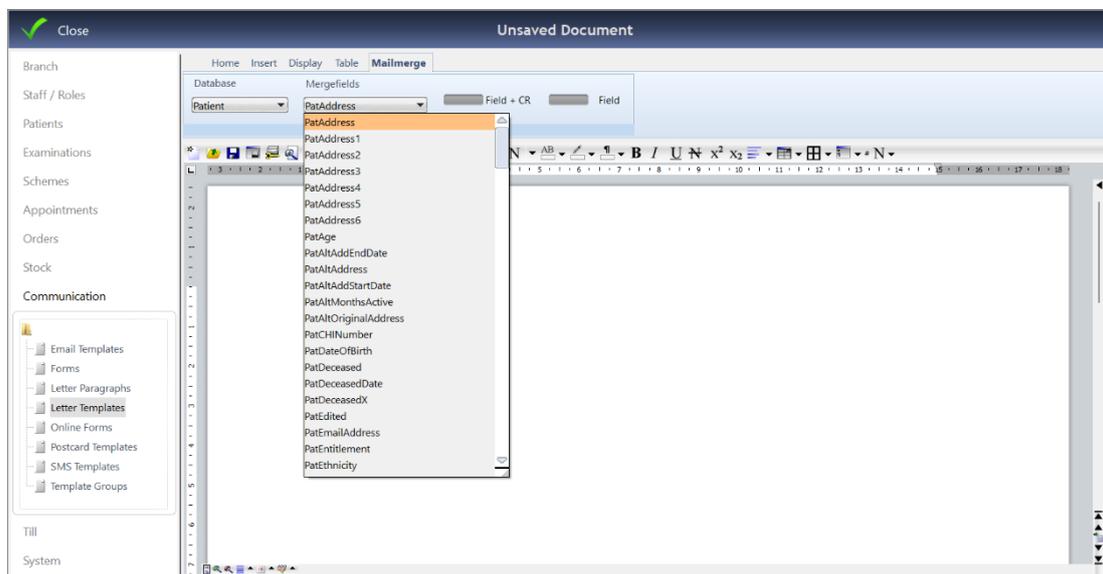


How to use the Mailmerge function

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

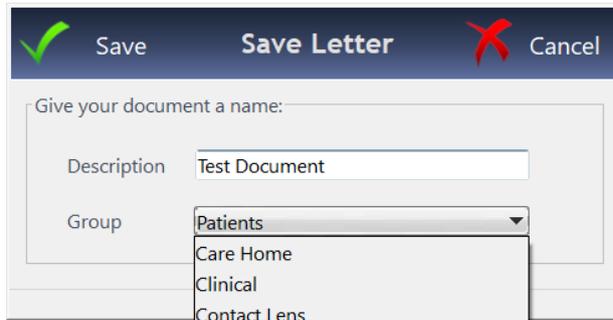


- Type the text you want within your document. Then add the fields as you go through.
- These are found within the **Database** and **Mergefields** dropdowns.
- Dependant on which part of the Database you want to get the information from will depend on which fields will be shown in the **Mergefields**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



Adding a Mergefield

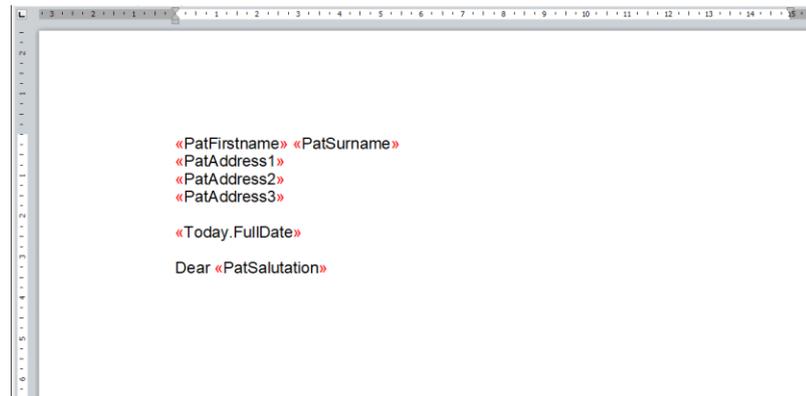
- Click on the field you want to add to your document, then click either:
Field + CR (this will put in the field name plus a carriage return) or **field** (this will NOT put in a carriage return)
- Once the document has been created, click **Save**. Name the Document and put it into a Group.



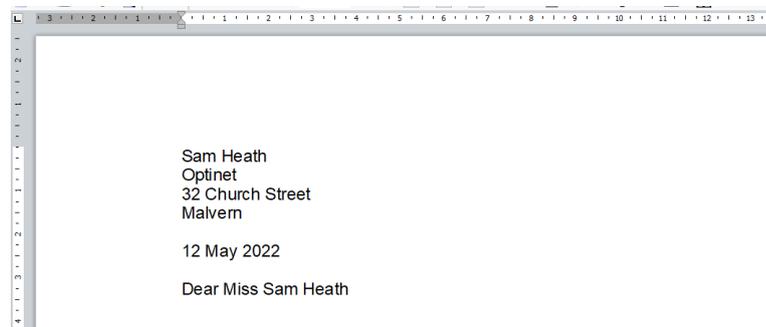
- The examples below show how the template will look once created and then once it has been run on a patient record.



Template

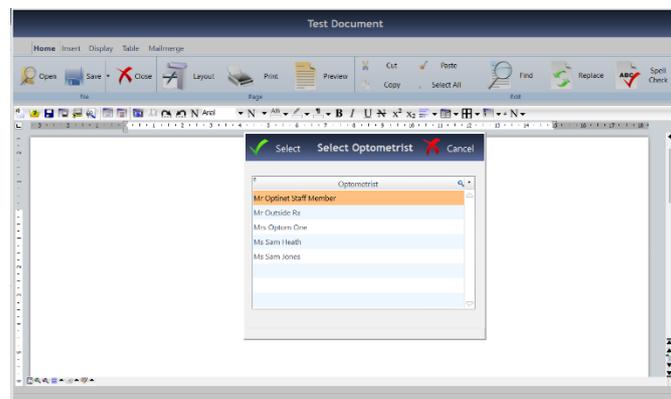
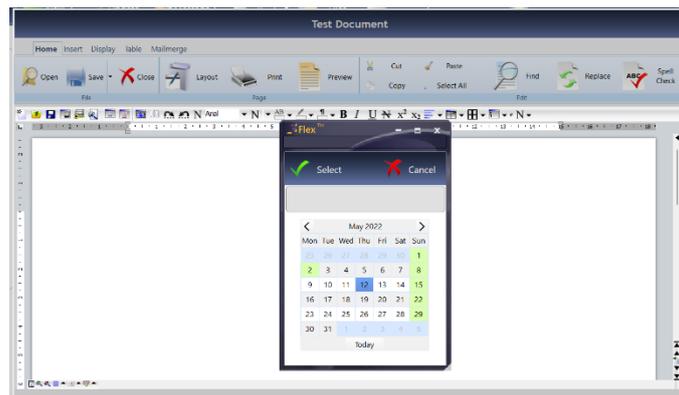


Letter when run



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.



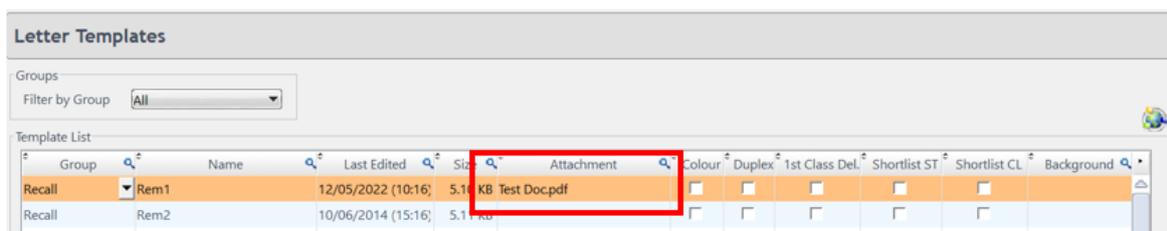
- **Patient:** Enter details about the Patient, such as their address and phone number. Note that titles are found under **Title**
- **Test:** Test details, such as the Date, Optom and Recommendations/advice are found here. Use in tandem with:
- **TestRx:** The Prescription details. These merged fields 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

- o Menu > Setup > Communication > Letter template
- o Click on the document you want to add an attachment to highlight it.
- o Click on the **Attachment** button on the blue bar at the top of the screen.
- o Select the PDF you want to add
- o Click open
- o 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.