.IRIS | Practice Engine

QUICK REFERENCE GUIDE

DOCUMENT CREATION USING THE LETTERS DASHLET

Note: This is only applicable to On Site installations of Practice Engine.

Documents can be created from within Practice Engine using the Contact and Clients letters dashlets. These dashlets populate a letter template with contact information from the Contact or Client.

Before the dashlet can be used the Letters templates must be created. These are Word documents that make use of the Bookmarks feature within Word. A sample template called Mailmerge.docx is supplied with a standard installation and can be used as a starting point for creating additional templates.

CREATING A TEMPLATE

- Open the Mailmerge.docx file from within Inetpub\wwwroot\PracEng\Letters folder on the web server
- This file lists the default fields that can be used in a letter.
- Create the wording of the letter template, cutting the fields that are to be used into the correct place within the document.
- Save the document into Inetpub\wwwroot\PracEng\Letters on the web server.

> Note: If multiple instances of the same field are required then these will need to be added as additional fields in the stored procedure. See the section below.

CREATING NEW FIELDS

Additional fields can be created by adjusting the stored procedure and adding the additional fields as bookmarks to the document.

- Open the stored procedure pe6_Contact_Letter_Details.
- Modify the stored procedure to return the additional fields that are required.
- Within the template, add the field that is required in the form «Today».
- Create a bookmark within the document for the field. The bookmark name must be the same as the fieldname in the stored procedure. For instance if the Client Year End is returned in the stored procedure as CltYearEnd then the bookmark needs to be called CltYearEnd.

LINKING THE TEMPLATE TO THE DASHLET

The letter template needs to be linked to the Contact/ Client dashlets.

- Open Categories Etc from Admin, System Maintenance
- Expand the Main Categories node
- Click onto Letters
- Click onto **Add New**
- Enter a description for the letter. This is what is displayed on the dashlet.
- Enter the filename including the docx extension.
- Tick for it to be valid/ shown on the Contacts Dashboard/ Client Dashboard
- Select which security groups can see this template.
- Click onto Save to save the link.

CREATING A LETTER

Letters can be created from either the Client or Contact dashboard. The process is the same for both:

- Navigate to the dashboard of the Contact or Client that requires the letter.
- Select the Contact to be used within the letter.
- Select the Address to be used on the letter.
- Select the letter required.
- Click onto Open letter.
- The letter will open in Microsoft Word and can be adjusted as necessary.
- Save the letter to the required location.