How do I import a document template into Best Practice?

This FAQ is intended to answer common questions about importing a template into the Best Practice Word Processor that you have received from Best Practice Software or another source.

Many Divisions have websites which have comprehensive lists of templates. If there isn't one formatted for BP you could use the MD one as these can be imported successfully.

Note: The template must have been created in an application which supports TX text controls for creating fields (i.e Best Practice or MD2 or MD3) and provided to you in an .RTF format (rich text format) in order for the process to work.
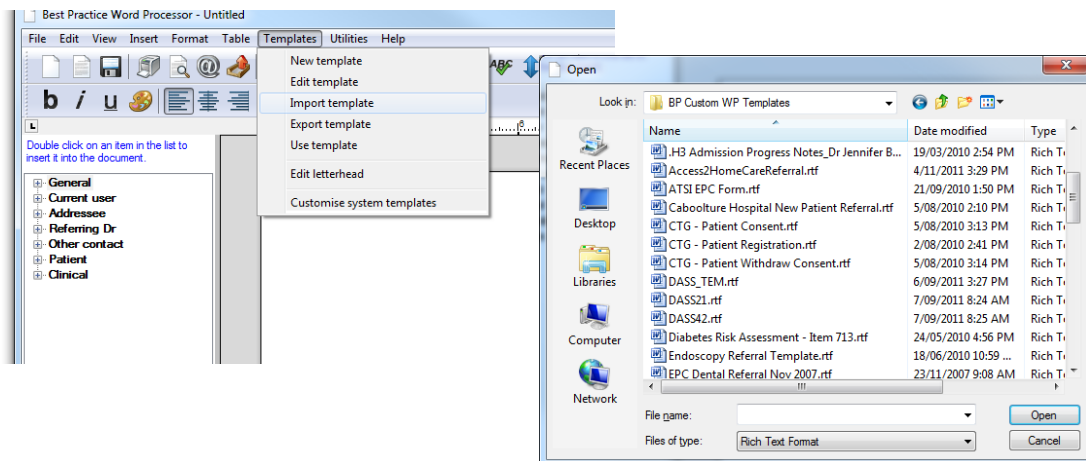
Importing the template:

1) Save the template file to a folder on your PC.

Tip: Do not open the file in a word processor as it will corrupt any Template fields. If downloading from a website or email select 'Save as' rather than opening the document and saving.

2) To open the **'Word processor'** press the icon or the **F4** key. When on the main Best Practice screen you can also select **Utilities > Word processor**. When in a patient record, select **File > New Letter.**

3) Select **Templates > Import Template**. Browse to the directory that you have saved the .RTF template into. Select the file name to be imported and press the **Open** icon.
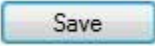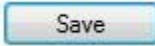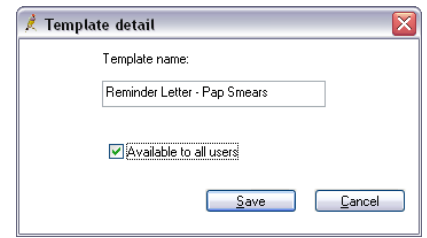

4) The template will now be displayed in the Word processor.

5) Make any changes that you might require and then save the template.

Saving a template

To Save the Template choose **File > Save as** or select the 💾 icon to save the Template.   The **'Template Detail'** dialog box will be displayed showing the previous name for the template.

- To save as current name: Press the `Save` button.

- To save with a new name, type the new name into the **'Template name'** field and Press the `Save` button.

> **Note:** *Ensure you have selected 'Available to all users' check box to allow other users to have access to the template if required.*

MORE INFORMATION

For more information consult the Best Practice Help Library or contact us via our

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