

Creating Templates for InTouchPro

To create recordable documentation within InTouchPro you must first set up your template files, which may contain 'labels' that InTouchPro can replace with other information that you have recorded in the system.

One of the advantages of InTouchPro is the simplicity of its template system, they are just Microsoft Word documents with replaceable 'labels' in them. The 'labels' are short expressions, which we hope are fairly self explanatory, enclosed in square brackets – such as [DATE RAISED].

For example, if you have a template with the 'label' [DATE RAISED] this will be replaced with the date the document was raised in the format '01/04/2004' (dd/mm/yyyy).

The format (font, bold, italic etc) of the 'label' is retained when InTouchPro replaces it – so if you make the 'label' bold, the text that replaces it will be.

Please note, all the 'labels' must be in uppercase or InTouchPro will ignore them.

The first step is to create a document type with a name that suits the template you are going to create (you will need InTouchPro Administrator rights to do this). To add a document type click on the 'Other Utilities' button on the InTouchPro main menu.

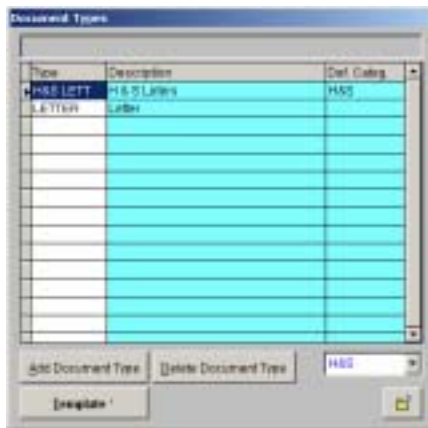


Then click on the 'Document Types' button from the 'Other Utilities' menu.



If this button is disabled (i.e. the text is a light grey colour) then you do not have Administrator rights within InTouchPro, consequently you will need to get an administrator to add the document type for you.

InTouchPro will present a form like the one shown below:



To add a new document type to this list, click on the 'Add Document Type' button, this will result in InTouchPro presenting a form like this:



All that is required is a document type – limited to 8 characters (including spaces) – and a short description. When these have been entered, click on the 'Save' button.

Once your new document type has been added, you need to create the template. InTouchPro will create one for you, placing it in the correct place, if you click on the 'Template' button:



The template that InTouchPro creates is meant as an example only – it contains ALL the available 'labels' and very little sensible formatting – the design is meant to help you modify one of your existing documents to become a final template for new documents.

By way of example, below is a picture of a template created by InTouchPro, showing all the available 'labels':



Clearly, this is not in itself really ideal for a fax – *using it to create a document would result in an address that might look like this:*

**Mr Martin Griffin
Mr
Martin
Griffin
Managing Director
Finedata Limited
10 Ashley Court
Somerset Road
New Barnet
Herts
EN5 1RQ**

It is, however, a useful reference for all the available 'labels' – *which could be 'cut-and-pasted' into a document of your own choosing.* You might want to print the basic InTouchPro template for later reference.

A more sensible finished fax template might look like this:

Finedata Limited 10 Ashley Court Somerset Road New Barnet Hertfordshire, EN5 1RD Tel: 020 8441 8979 Fax: 020 8440 8281] www.finedata.com			
FAX			
☒	TO:	[THEIR FULLNAME]	FAX NO: [THEIR FAXNO]
	FROM:	[FROMFULL]	PAGES:
	DATE:	[DATE RAISED WORDS]	cc:
	JOB NO:	[OUR JOBNO]	OUR REF: [OUR REF]
	RE:	[SUBJECT]	
Dear [SALUTATION]			
TYPE FAX HERE			
Regards,			
[FROMFULL] [FROMPOSITION] Direct Dial: [OUR TELNO] / Mobile: [OUR MOBILE] / Email: [OUR EMAIL]			

Notice how the 'labels' are placed where they are needed and that they do not all have to be used. If you are not 'cutting-and-pasting' be careful to ensure you enter your 'labels' spelt EXACTLY as shown on the template that InTouchPro creates for you.

When you have completed modifying your own document you should save it with the same name and in the same folder as the InTouchPro version.

The templates are stored in a folder called templates, below the database folder – for example if your InTouchPro folder is:

G:\APPS\INTOUCHPRO\INTPDATA\ACMELTD\

The templates will stored in:

G:\APPS\INTOUCHPRO\INTPDATA\ACMELTD\TEMPLATES\

Each one is given a name that exactly matches the name of a document type in InTouchPro – so the document type ‘FAX’ will have a template called ‘FAX.DOC’, and the document type ‘LETTER’ will have a template called ‘LETTER.DOC’.

So, the full name and path for a fax template in the example above would be:

G:\APPS\INTOUCHPRO\INTPDATA\ACMELTD\TEMPLATES\FAX.DOC

If you followed the procedure correctly, saving the new file in the right place, the ‘Template’ button in InTouchPro for the document type you have added should change to bold text, with an asterisk on it:



Summary of available labels for InTouchPro templates

<u>InTouchPro Label</u>	<u>Replaced With</u>
[OUR ADDRESS]	Address that has been assigned to the InTouchPro database that is in use.
[OUR TELNO]	Telephone number of person raising the document.
[OUR FAXNO]	Fax number of person raising the document.
[OUR MOBILE]	Mobile phone number of person raising the document.
[OUR EMAIL]	E-Mail address of person raising the document.
[OUR WEB]	Web address of person raising the document.
[OUR REF]	Our reference for the document (i.e. 1234/MA/PG) Where the number is the document identifier and the initials are those of the person raising the document, and the person who typed it into InTouchPro (if different).
[OUR ENQNO]	Our Enquiry number.
[OUR JOBNO]	Our Job number.
[DATE RAISED]	Date document raised (in dd/mm/yyyy format).
[DATE RAISED WORDS]	Date document raised (in 01 January 2004 format).
[THEIR REF]	Any reference from the recipient.
[THEIR FULLNAME]	The recipients full name (i.e. Mr John Smith).
[THEIR SURNAME]	The recipients surname.
[THEIR POSITION]	The recipients job title.
[THEIR COMPANY]	The recipients company or organisation name.
[THEIR ADDRESS]	The recipients address
[SALUTATION]	The recipients greeting (i.e. 'Michael' could be addressed 'Dear Mike').
[SUBJECT]	The subject of the document.
[FROMFULLSANSTITLE]	The originators name, without their title (i.e. Michael Smith)
[FROMSALUTATION]	The originators greeting (i.e. 'David' could sign his letters 'Dave').
[FROMPOSITION]	The originators job title.