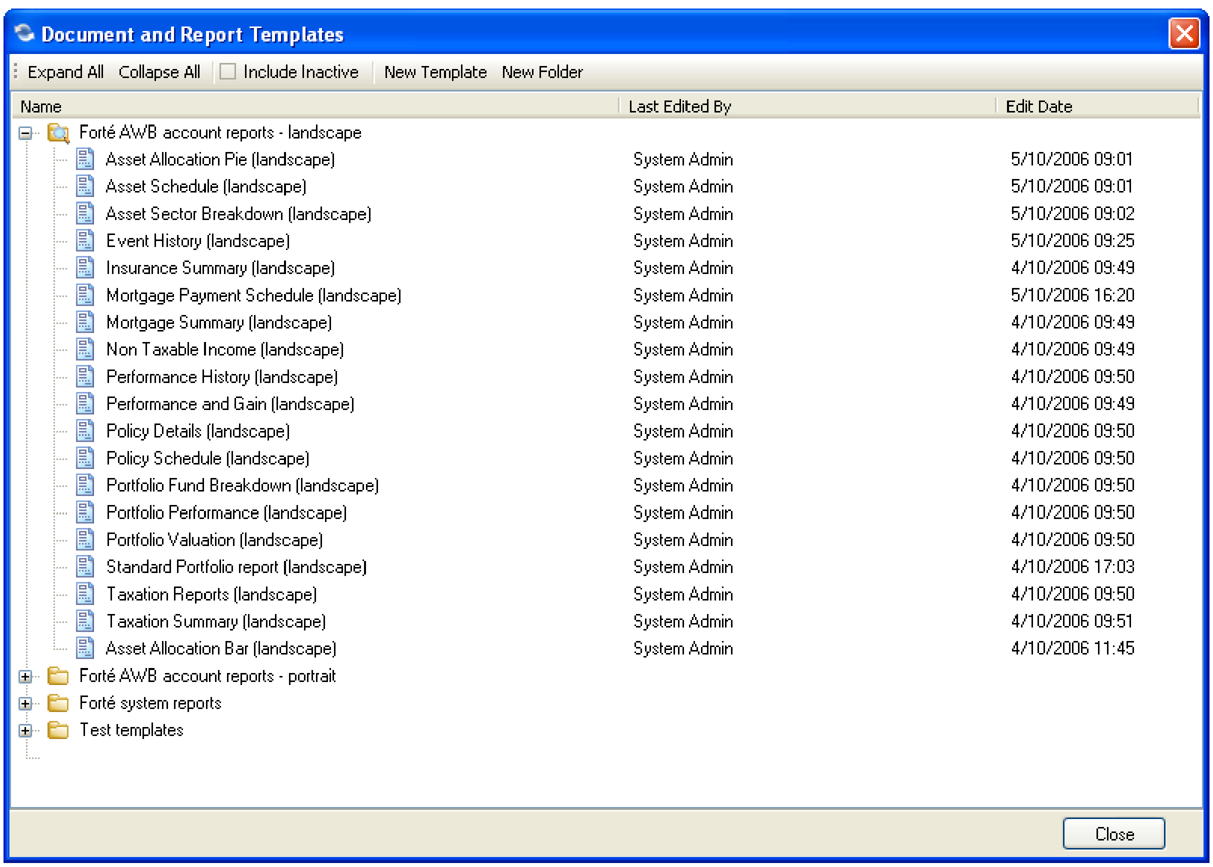
Document Templates

Document templates are model document la outs that can be used to qu ckl generate common letters, reports and other documents. The templates can conta n merge s mbols, wh ch are s mbols represent ng data. When documents are generated, the merge s mbols are replaced w th actual data from the Fort database. In Fort CRM merge s mbols are not l m ted to text output, such as a contact address—the can also use l ve data to generate tables, graphs and charts.

To view existing document templates:

- Select Setup → Document Templates at the top of the ma n Fort CRM screen.
- A l st of folders conta n ng var ous standard and user created document templates s d spla ed.
- Expand the appropr ate folder and double cl ck on the requ red template to v ew t.

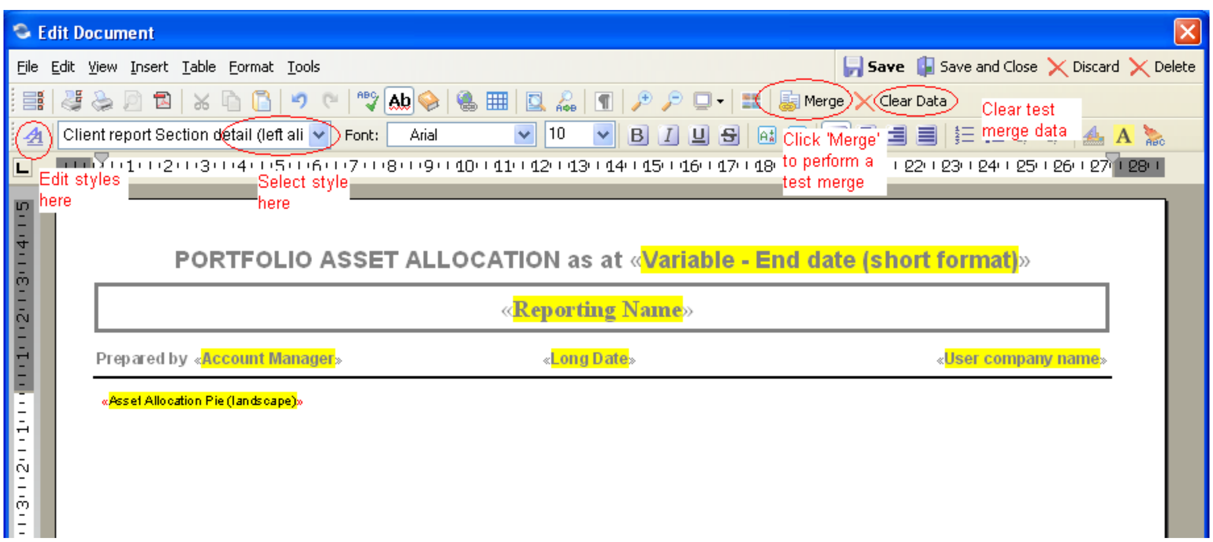


To create a new document template:

B default, a user does not have perm ss on to add or mod f document templates. Perm ss on can be g ven b the s stem adm n strator f th s fac l t   s requ red.

- From the l st of document templates (see above), cl ck the 'New Template' button.
- A blank document template s d spla ed. Set up the template for the letter or report b nsert ng the requ red document st les, text and merge s mbols as deta led below. Fort   prov des a full range of word process ng opt ons for document template creat on.
- Ex st ng documents and templates from from var ous word processors, such as M crosoft Word, can be mported nto Fort   CRM n R ch Text Format (RTF). Save the document n RTF format and use F le → Import RTF to mport the document nto Fort CRM.
- Cl ck the Save and Close button.
- Enter a un que name for the template and a code (short reference name).
- Use the browse button [...] to select a folder n wh ch to save the template (for example, Letters or Reports).
- Cl ck Ok to save the template to the database.

The mage below shows a template constructed as a cl ent report.



Headers and Footers

In the above template, the text above the merge s mbol 'Asset Allocat on P e (landscape)' s n a header. To add a header or a footer to a new document, select V ew → Headers and Footers n the menu.

Inserting merge symbols

At the po nt n the document where   ou w sh to nsert a merge s mbol, r ght cl ck and select 'Insert Text F eld', 'Insert Table' or 'Insert Graph' as requ red. A l st of standard merge s mbols and user def ned f elds   s d spla ed. Cl ck on the requ red f eld to nsert t nto the document. Merge s mbols are d spla ed n   ellow. There s no l m t to the number of merge s mbols   ou can use n a document, or the number of t mes   ou can use the same merge s mbol.

Some merge s mbols have parameters and var ables. Parameters can be thought of as constants. The   are saved w th the document template and are related to the output of that part cular template. For example, ' nclude t tle' or 'add page break'. Var ables are not constant—the   must be suppl ed for each document merge. For example, 'start date', 'end date', or ' nclude nact ve'.

To set a merge s mbol's parameters, cl ck on the merge s mbol n the template ed tor. The relevant parameters are d spla ed and can be set as requ red.

Var ables are set at merge t me. The   appear at the bottom of the Document Merge screen (see Ma l Merge).

Autotext

An Autotext s a frequentl   used p ece of text (or graph cs) that has been set up b   a user to enable ts reuse n documents. Autotext can be set up us ng the Autotext opt on on the Setup menu at the top of the ma n Fort   CRM screen.

To use an Autotext n a document template, t pe the name of the Autotext mmed atel followed b   a + s gn. Th s w ll be replaced b   the actual text stored n the Autotext. For example, t p ng STUFF+ w ll automat call   replace that w th the Autotext named STUFF. If   ou w sh to use an Autotext marker n a document template rather than nclud ng the full text, t s suggested that   ou t pe, for example, STUFF*. Template users can replace the * w th a + to generate the autotext when requ red.

Tables

Cl ck on 'Table' n the menu at the top and choose 'Insert Table'. Enter the requ red table formatt ng deta ls. Tables can be mod f ed b   us ng the opt ons n the 'Table' menu.

Previewing the Merge

When creat ng or ed t ng a document template,   ou can prev ew the output of a merged document at an   t me b   cl ck ng on the 'Merge' button n the toolbar at the top. You w ll be prompted for nformat on (such as an account or contact) requ red to generate a document from the template. The test merge s useful for check ng the output of a template as   ou are des gn ng t, w thout hav ng to close the ed tor. Documents generated us ng the test merge are not saved to f le—th s funct on ex sts merel   to test the output.

To edit a document template:

- Select a template n the l st of document templates, and cl ck the 'Ed t Template' button. The selected template s d spla ed.

- Make the requ red changes to the template.

- Cl ck 'Save' or 'Save and Close' to effect an changes made.

To delete a document template:

- Select a template n the l st of document templates, and cl ck the 'Delete Template' button.

- Cl ck 'Yes' to conf rm the delet on.

Note: Although ou ma have perm ss on to create and ed t document templates, ou ma not have perm ss on to delete them. Care should be taken when delet ng a document template as deleted templates are permanentl removed from the s stem and there s no eas wa to recover them.