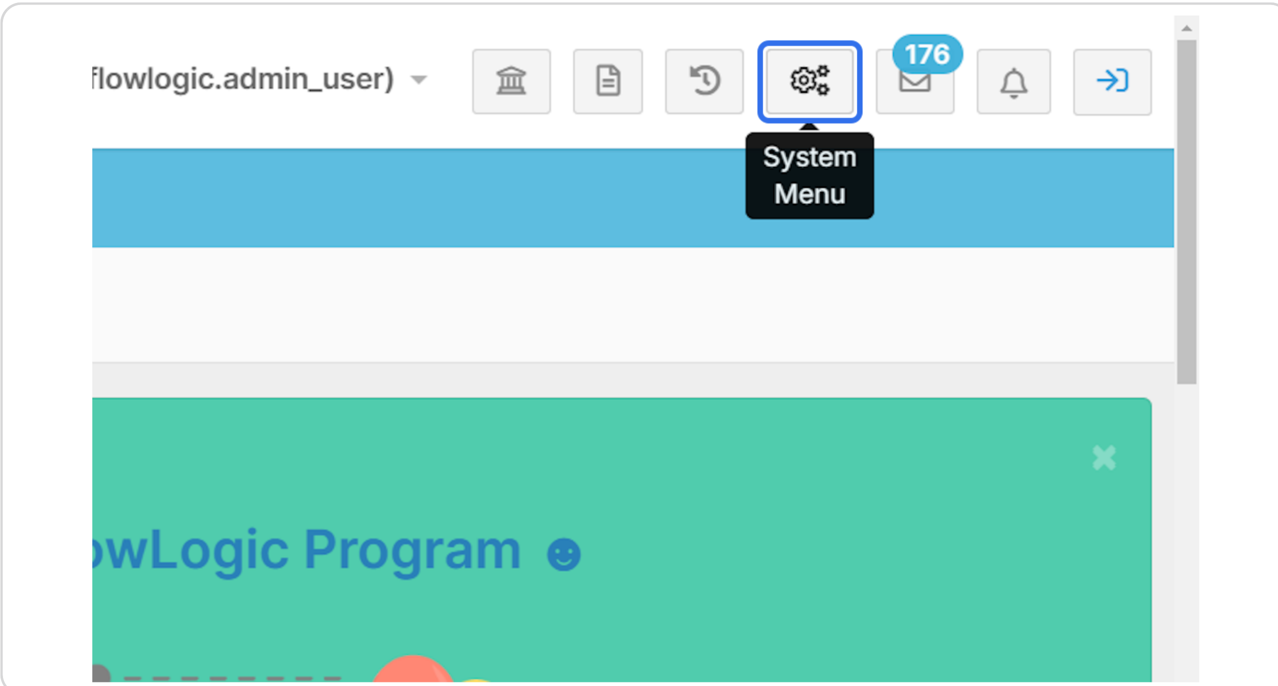
Editing a Word Template

6 Steps

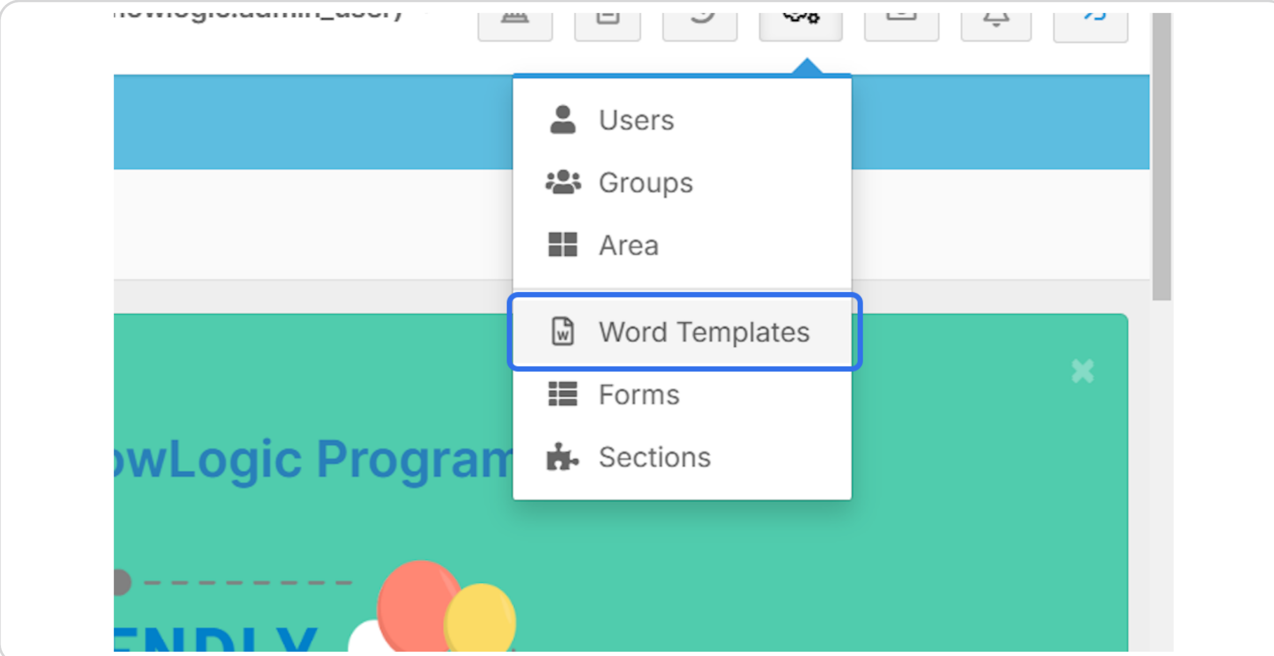
STEP 1

Click on System Menu



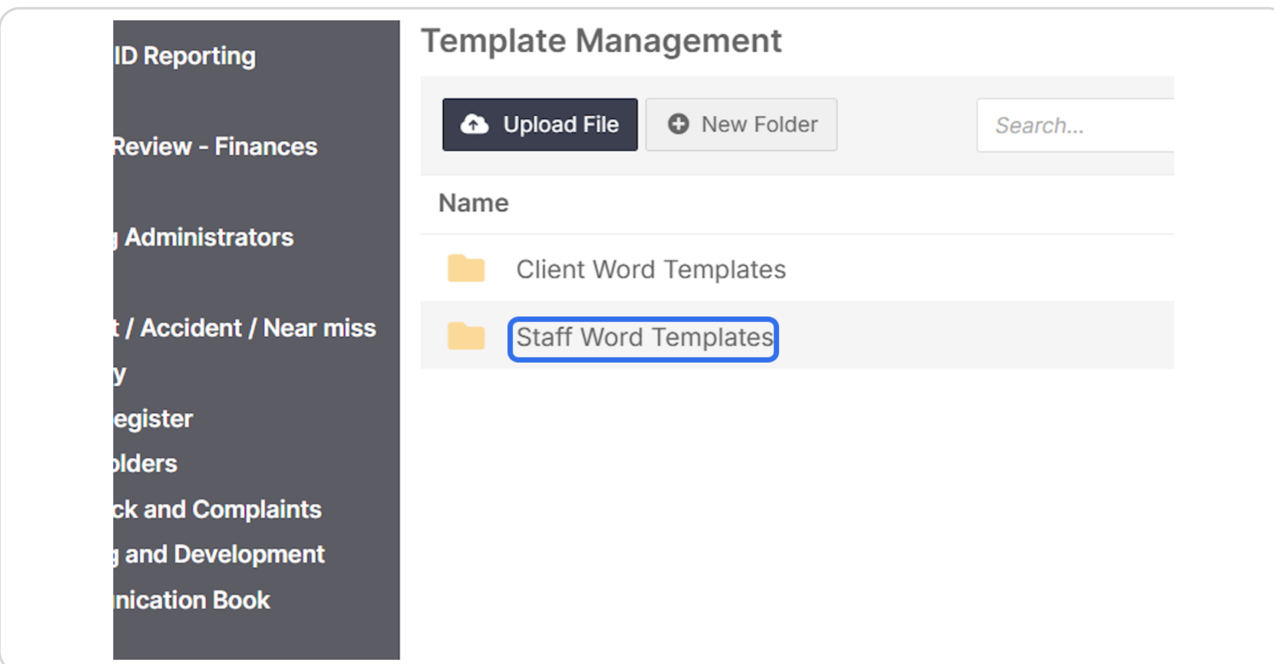
STEP 2

Click on Word Templates



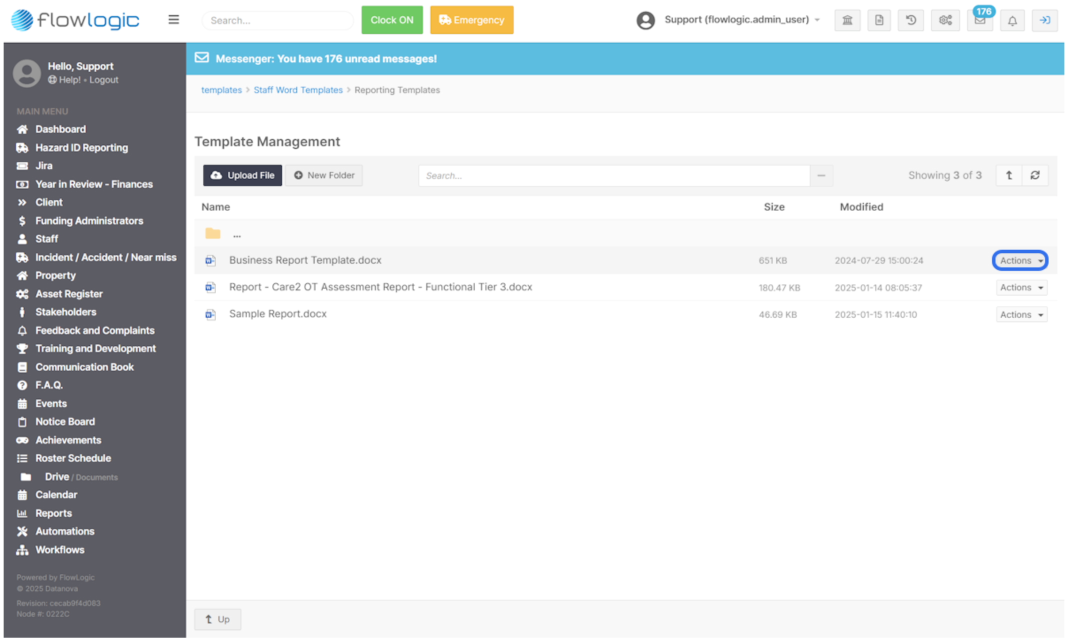
STEP 3

Click on your nominate folder, here mine is "Staff Word Templates"



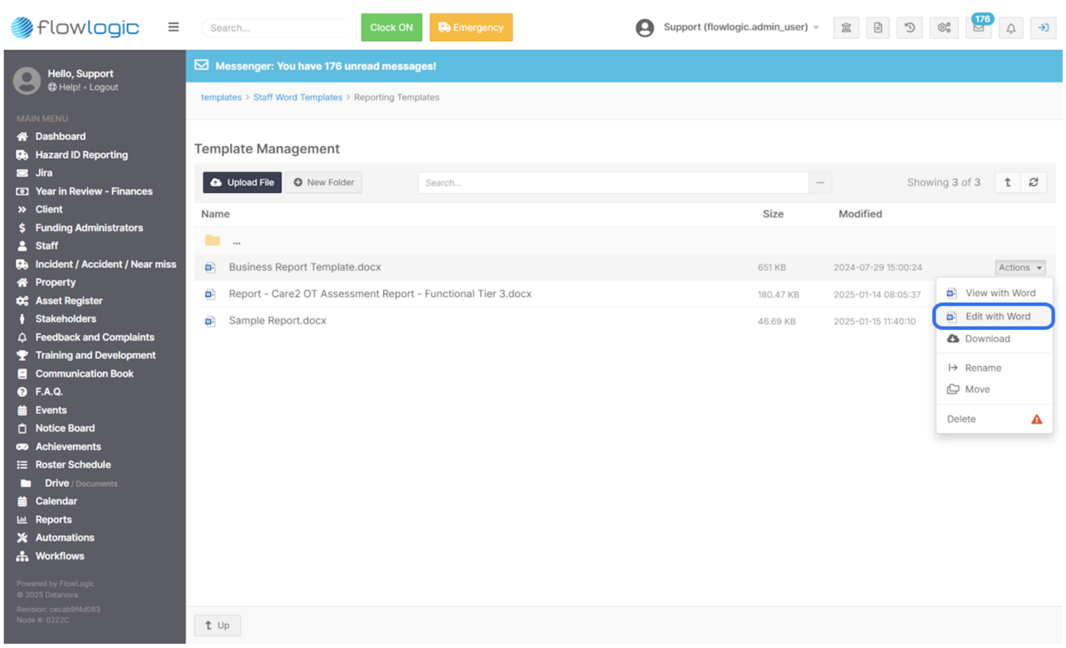
STEP 4

<u>Once inside the folder select Actions to present a further dropdown.</u>



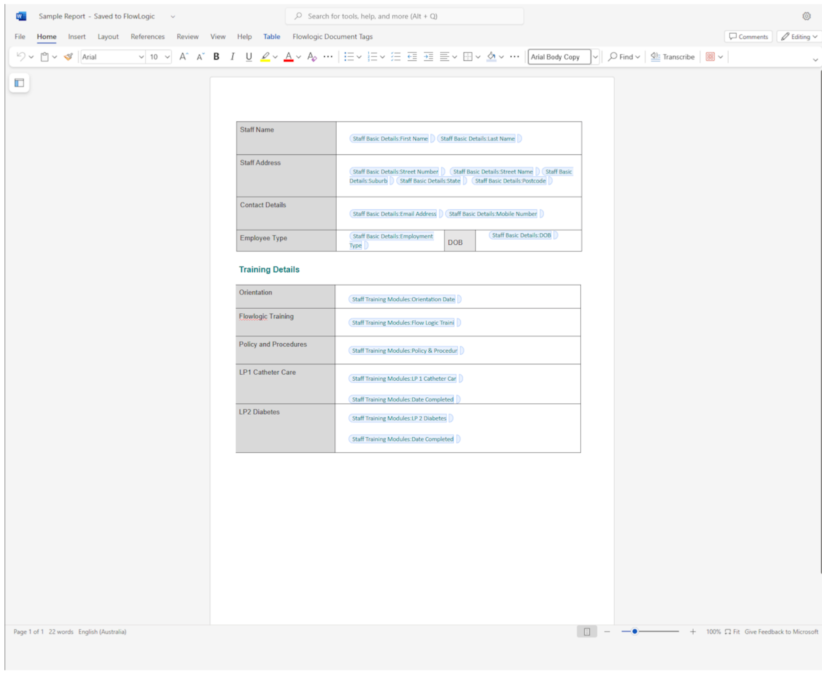
STEP 5

Click on Edit with Word



STEP 6

Once selected you will be taken to another Tab that will look similar to Word, This is where you will be able to make changes to your Templates.

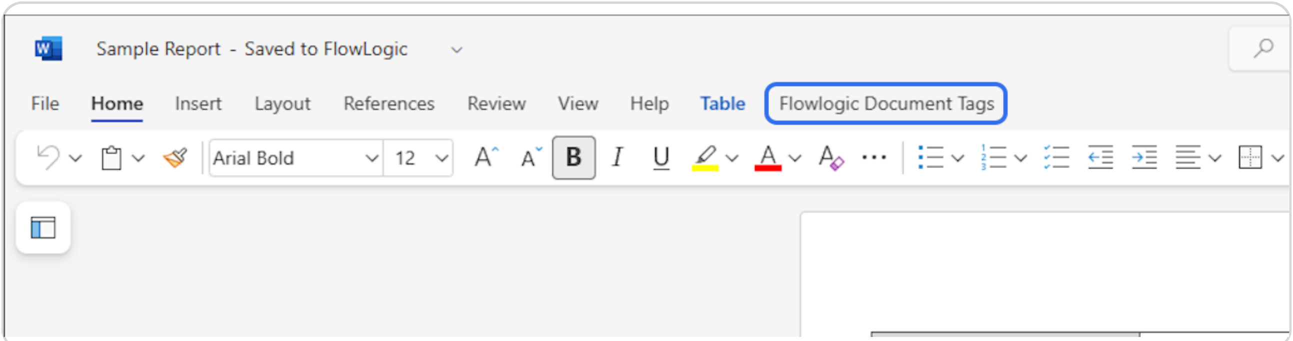


📝 How to Add and Remove tags from the template

5 Steps

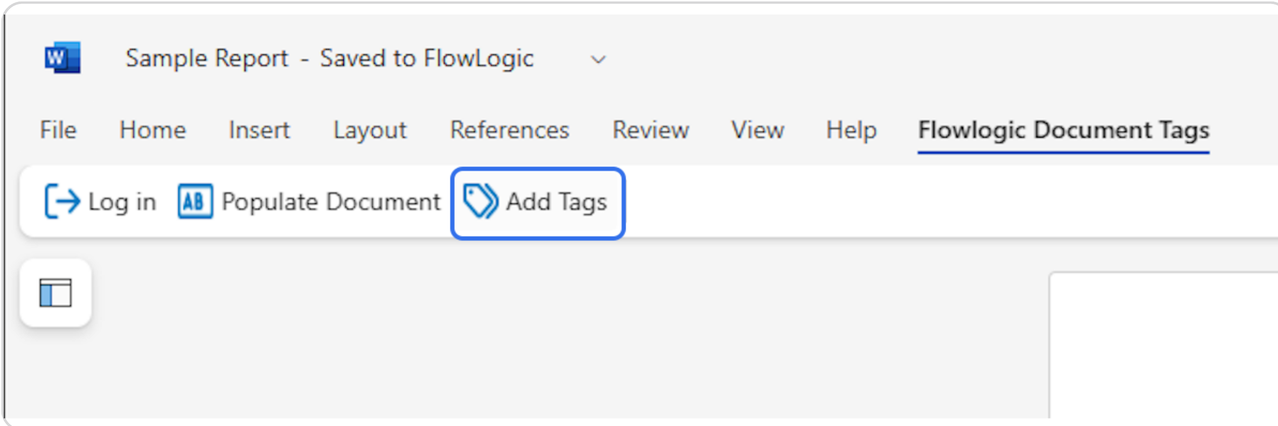
STEP 7

Click FlowLogic Document Tags



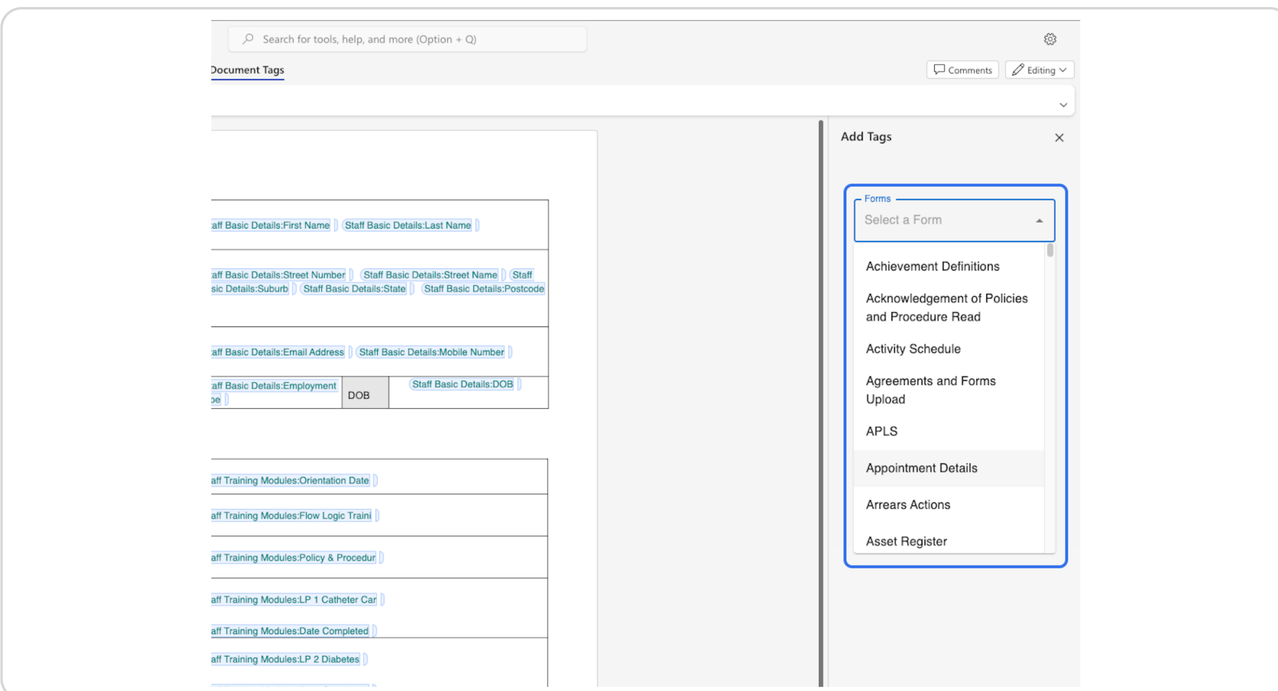
STEP 8

Click Add Tags



STEP 9

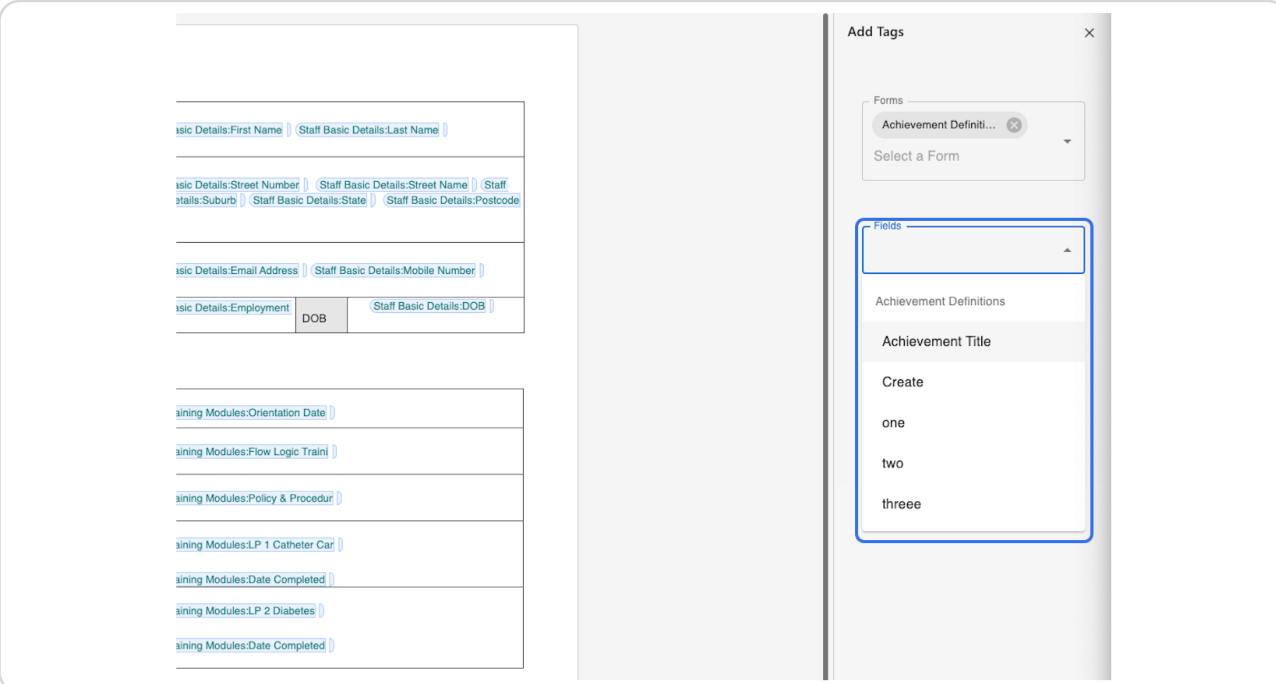
Select the Desired Form containing the information that will automatically populate within the form.



STEP 10

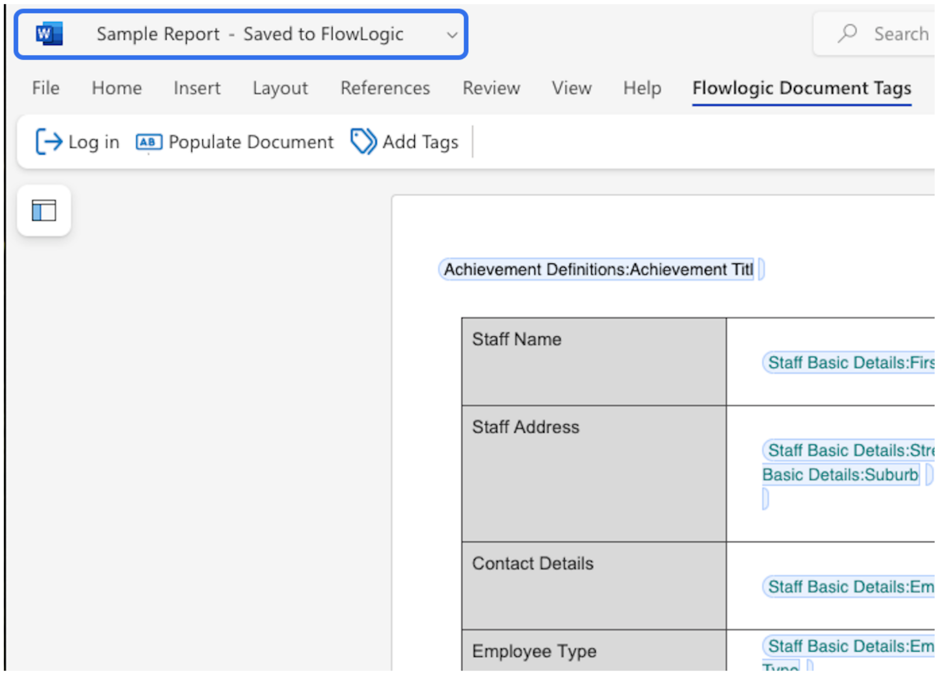
Select the desired Field from the Fields dropdown list.

Note: When selecting the field the system will automatically place the field at your Cursor location.



STEP 11

Repeat Steps 9 and 10 to place fields throughout the template and once complete, Verify that the upper left says "Saved to FlowLogic". Once confirmed simply close the tab.

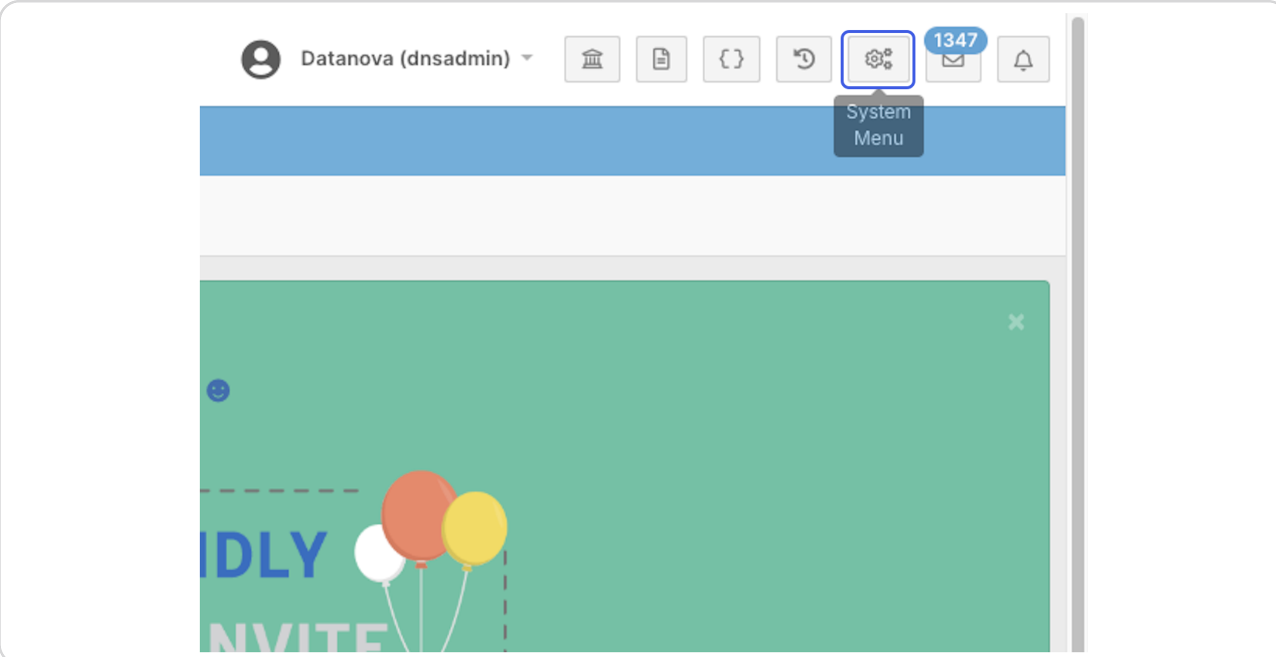


🔐 How to Manage Permissions.

7 Steps

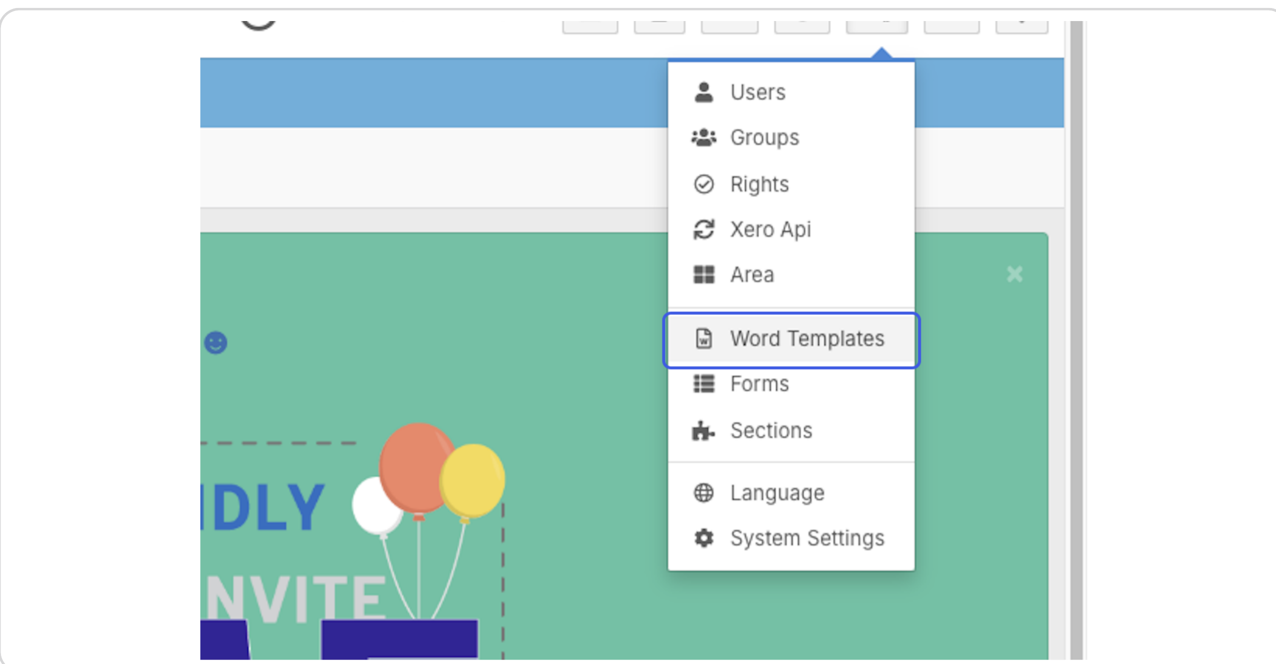
STEP 12

Click on System Menu



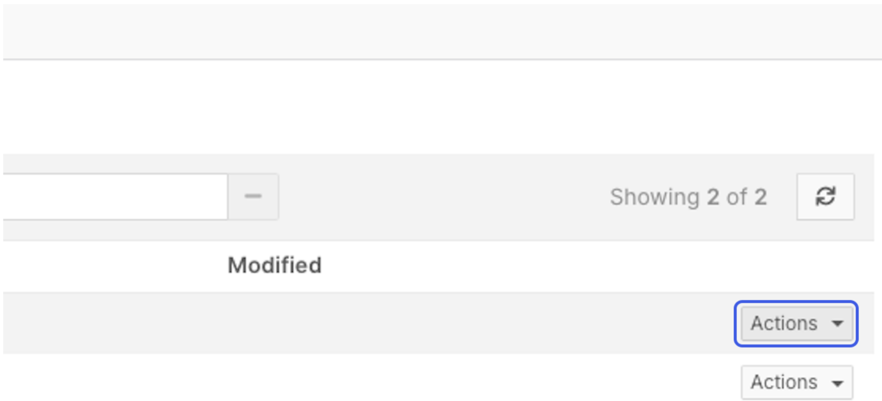
STEP 13

Click on Word Templates



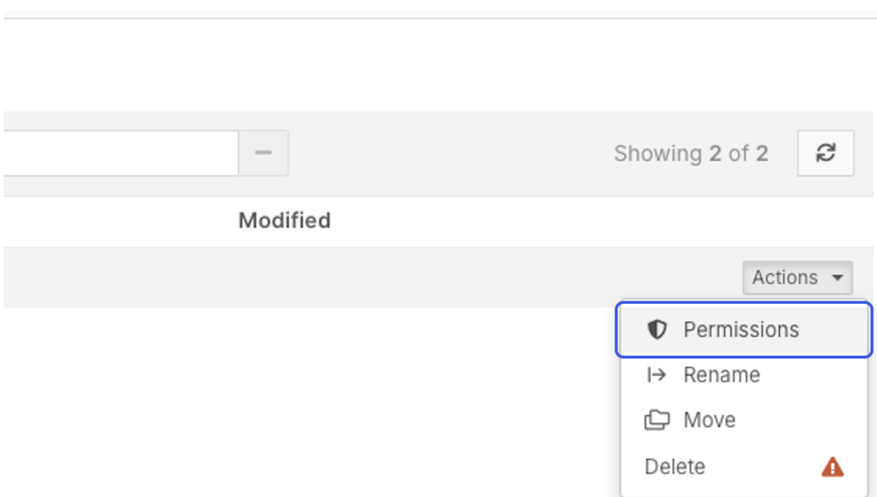
STEP 14

Click on Actions



STEP 15

Click on Permissions

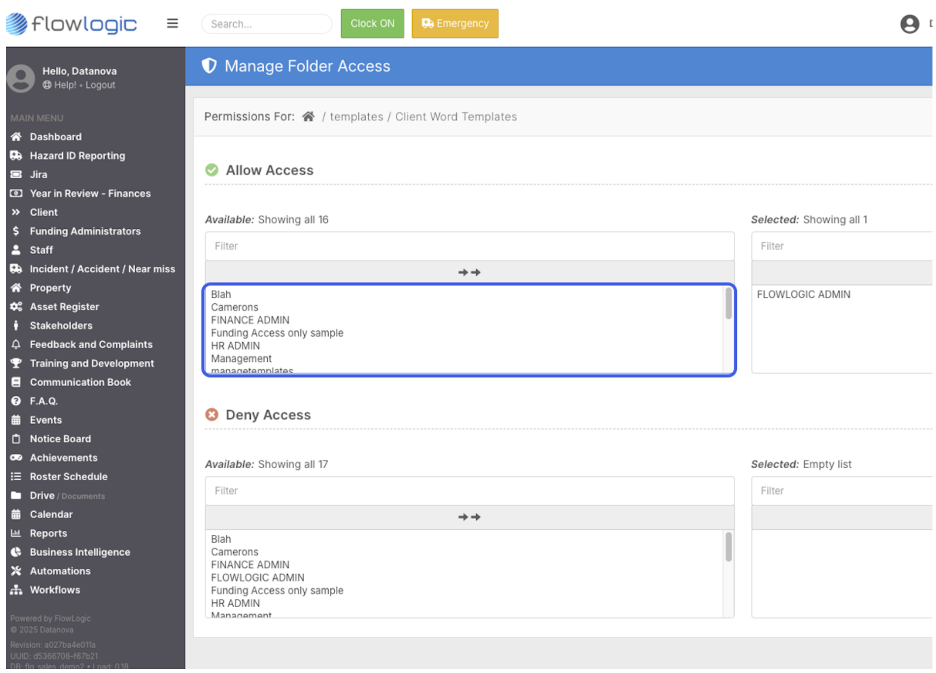


STEP 16

Under Allow Access select the groups to have access to this folder.

After selecting a group you should see the label move across to the Selected column on the right hand side.

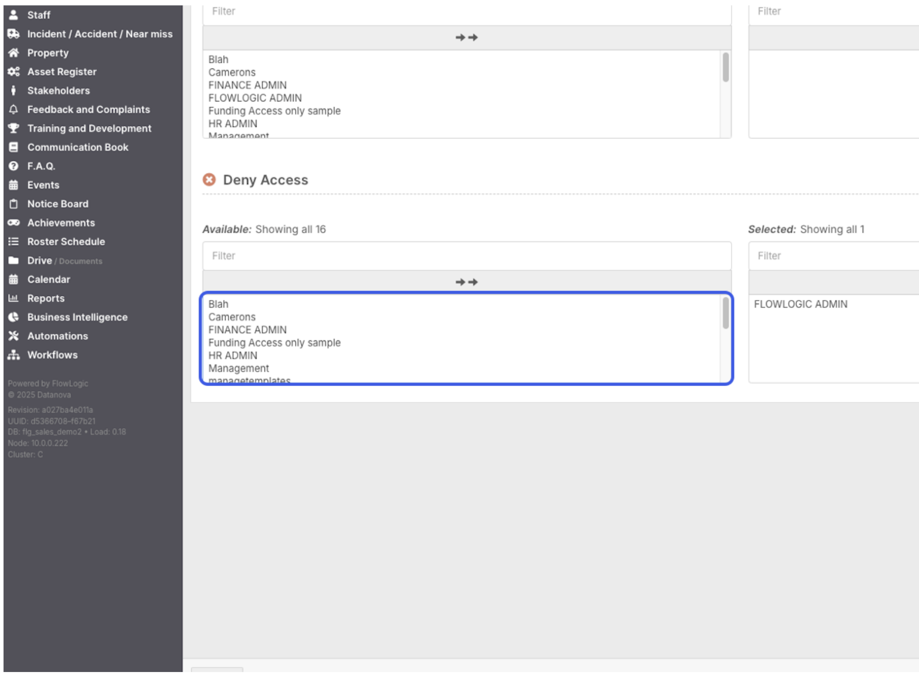
By simply Allowing access to one group the system will automatically prevent any user who is not apart of this group from seeing further information in the folder.



STEP 17

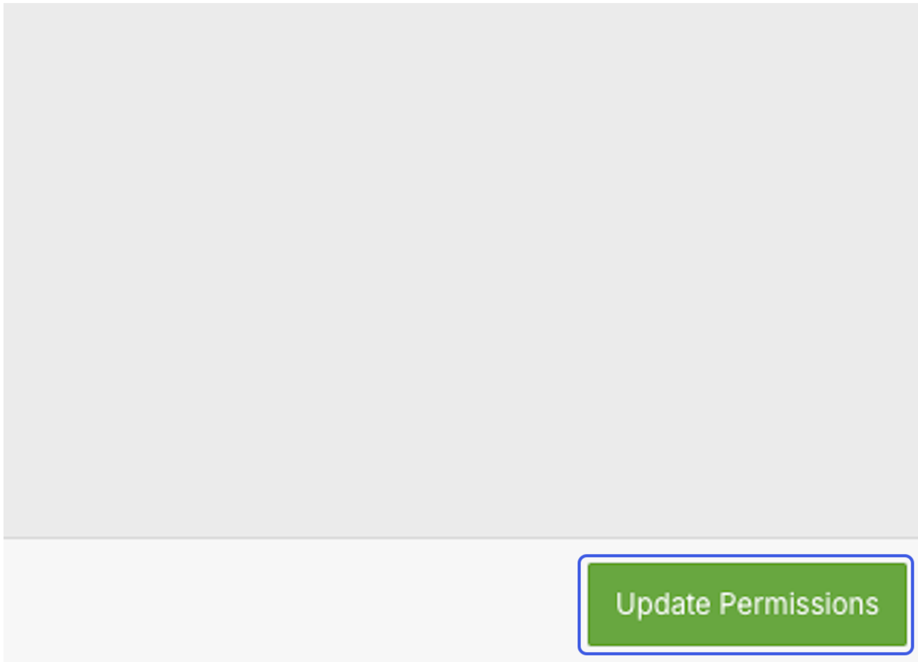
Optional Under Deny Access select any users to have no access to this folder in the future.

Deny rules should only be used if you have staff across multiple groups. For example if there is a user in FlowLogic Admin that also has access to Staff you can deny the staff group and they will be unable to see the folder.



STEP 18

Click on Update Permissions

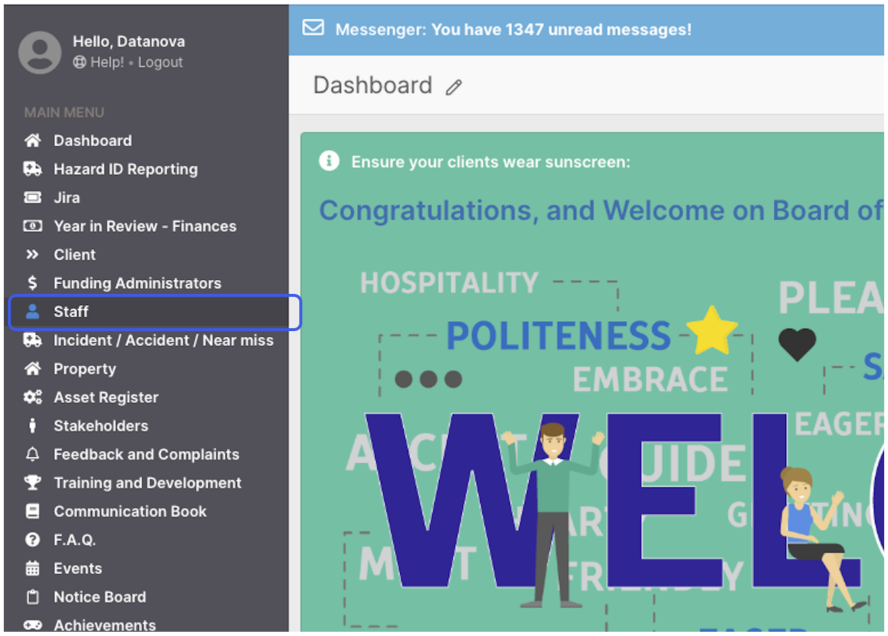


📝 How to Populate a document.

13 Steps

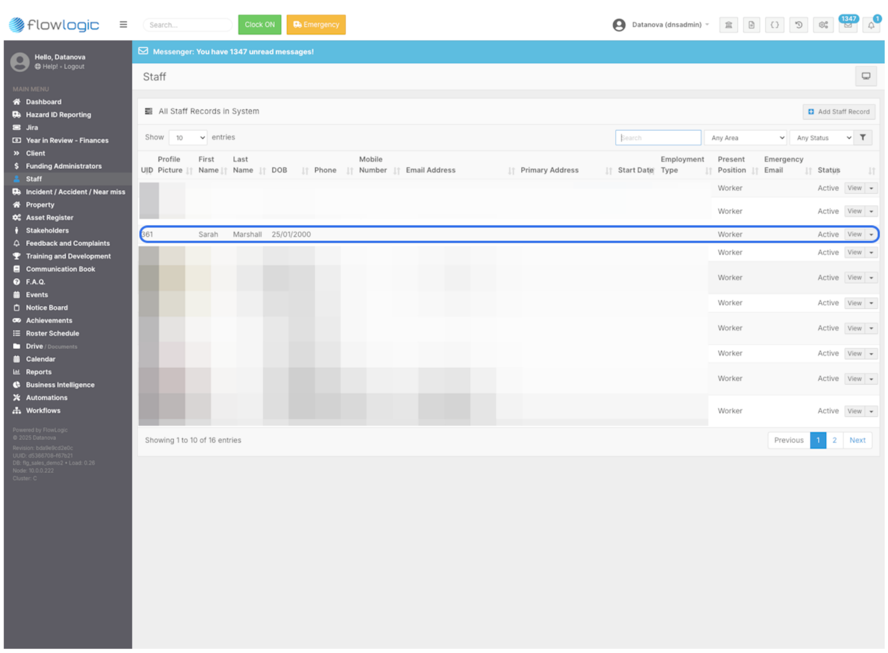
STEP 19

Click on Staff



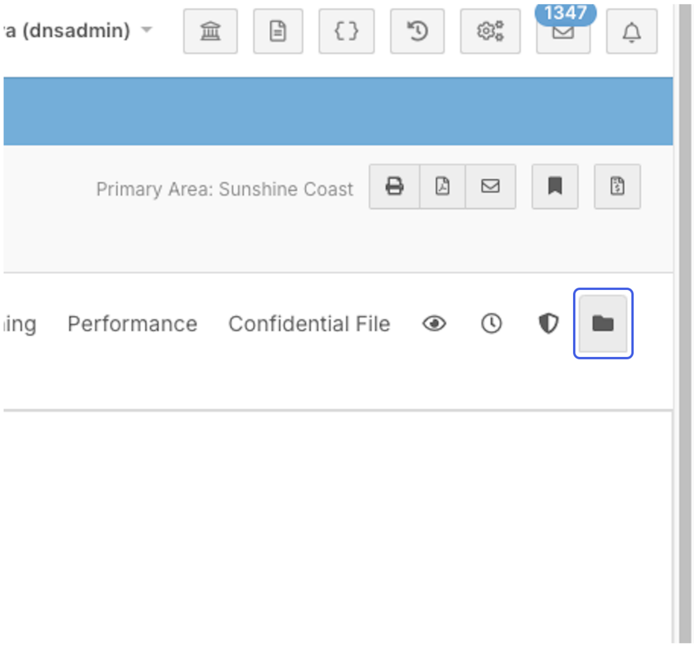
STEP 20

Click on the record that will be used in the template.



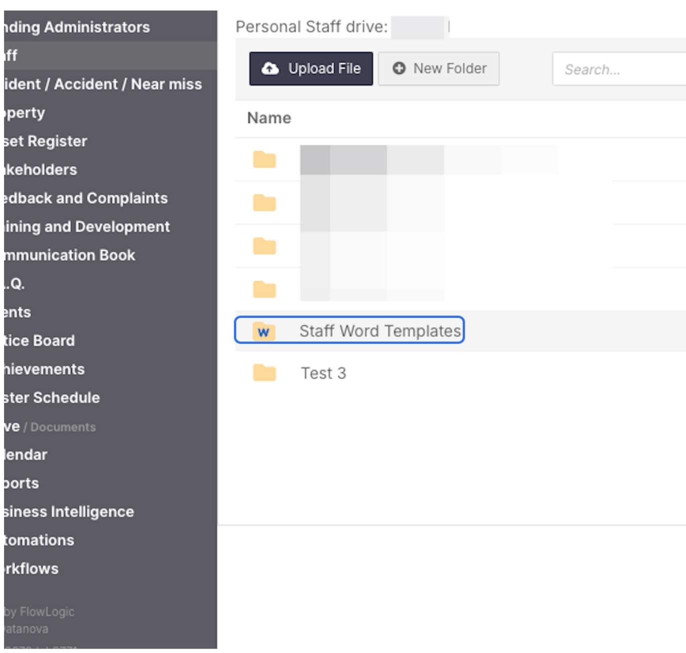
STEP 21

Click on highlight



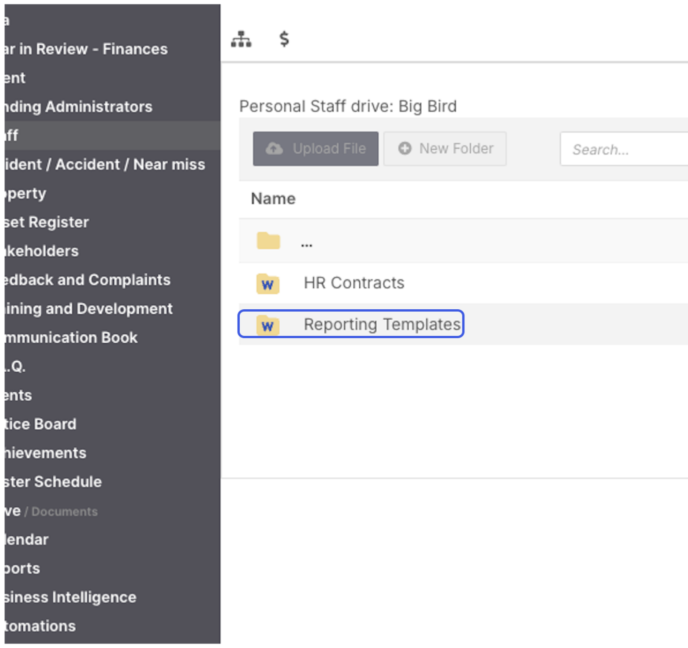
STEP 22

Click on Staff Word Templates



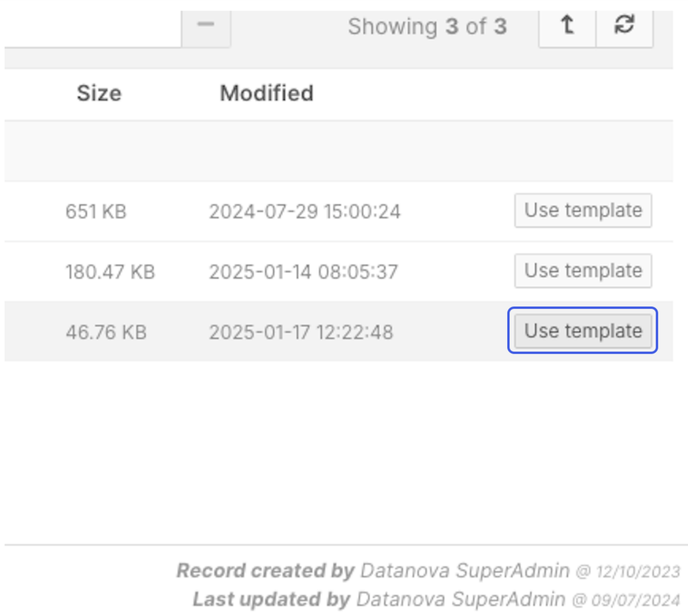
STEP 23

Click on Reporting Templates



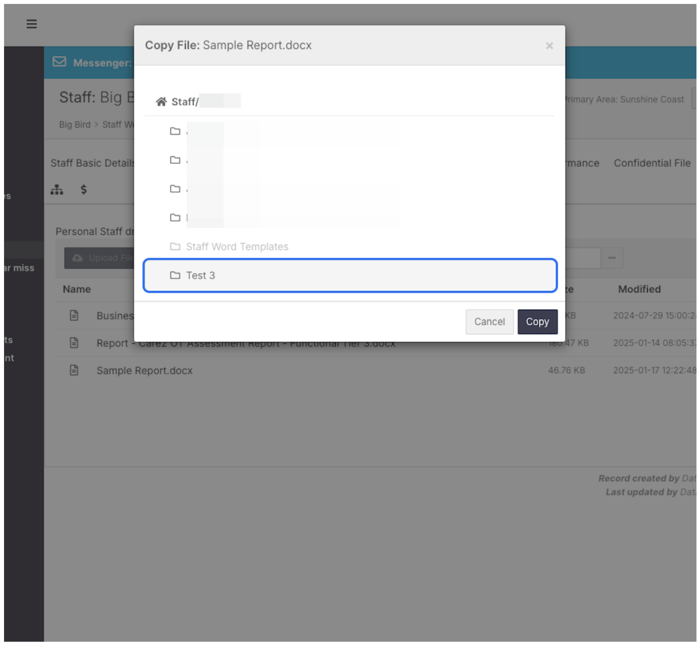
STEP 24

Click on Use template



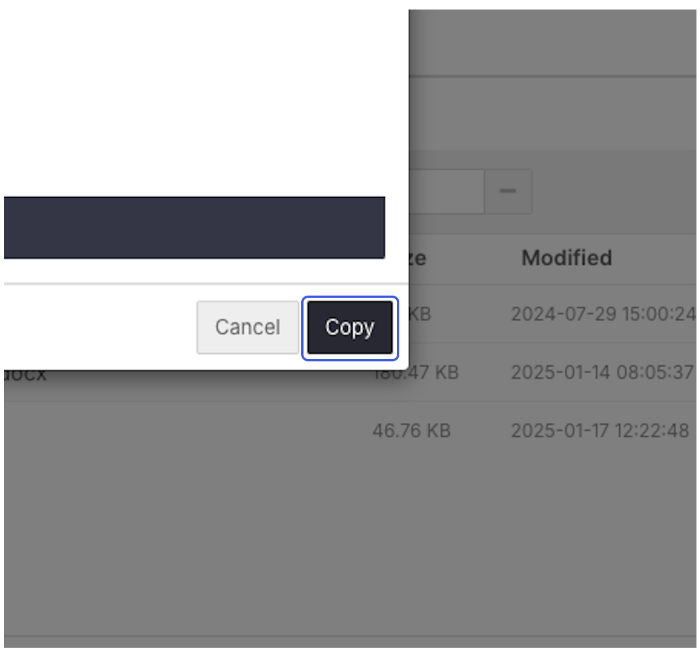
STEP 25

Nominate which folder will store the template on creation



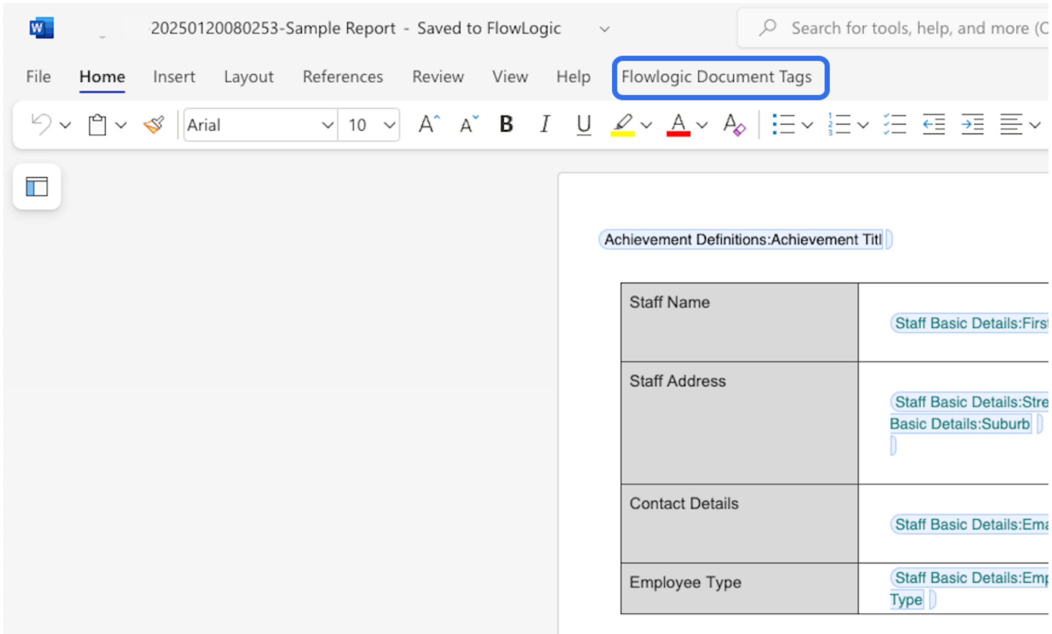
STEP 26

Click on Copy



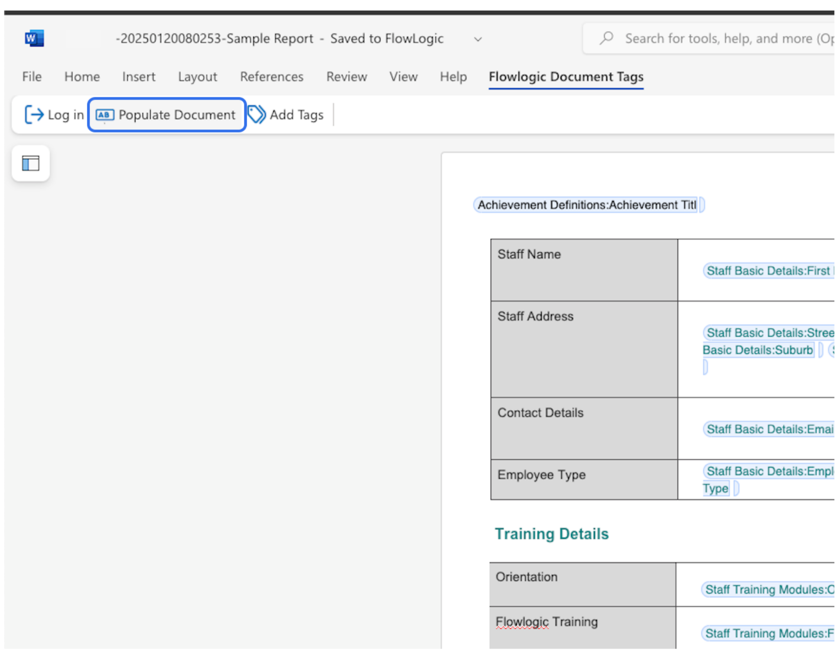
STEP 27

Click on FlowLogic Document Tags



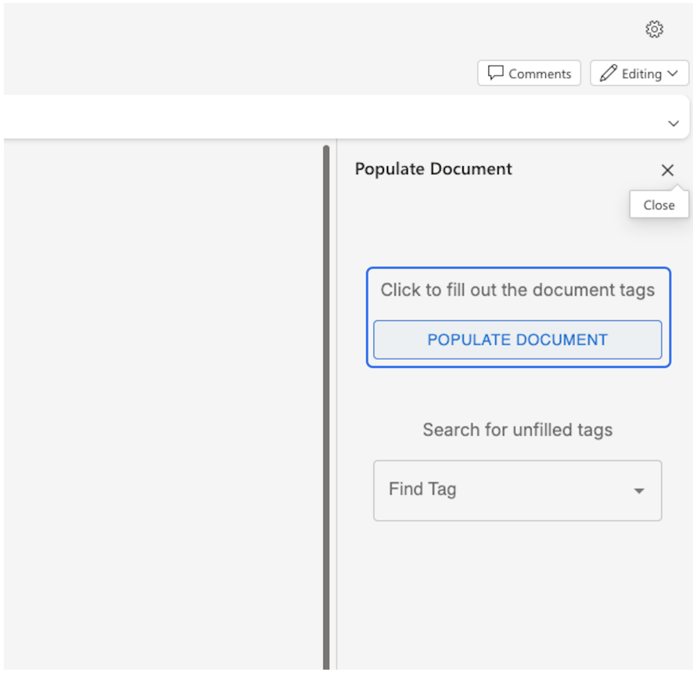
STEP 28

Click on Populate Document



STEP 29

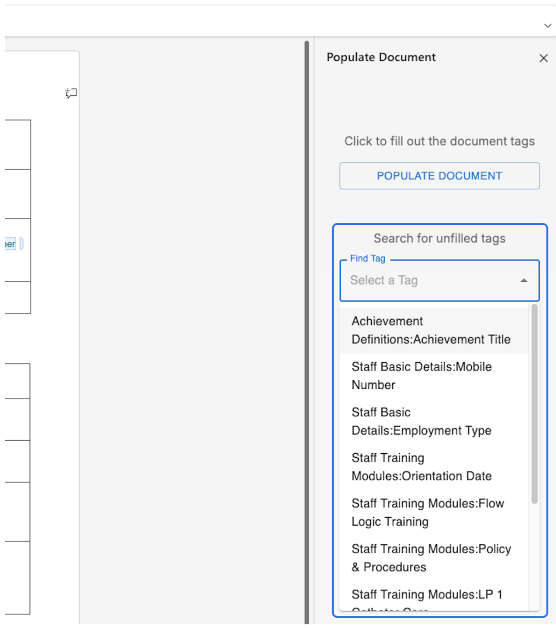
Click on Populate Document



STEP 30

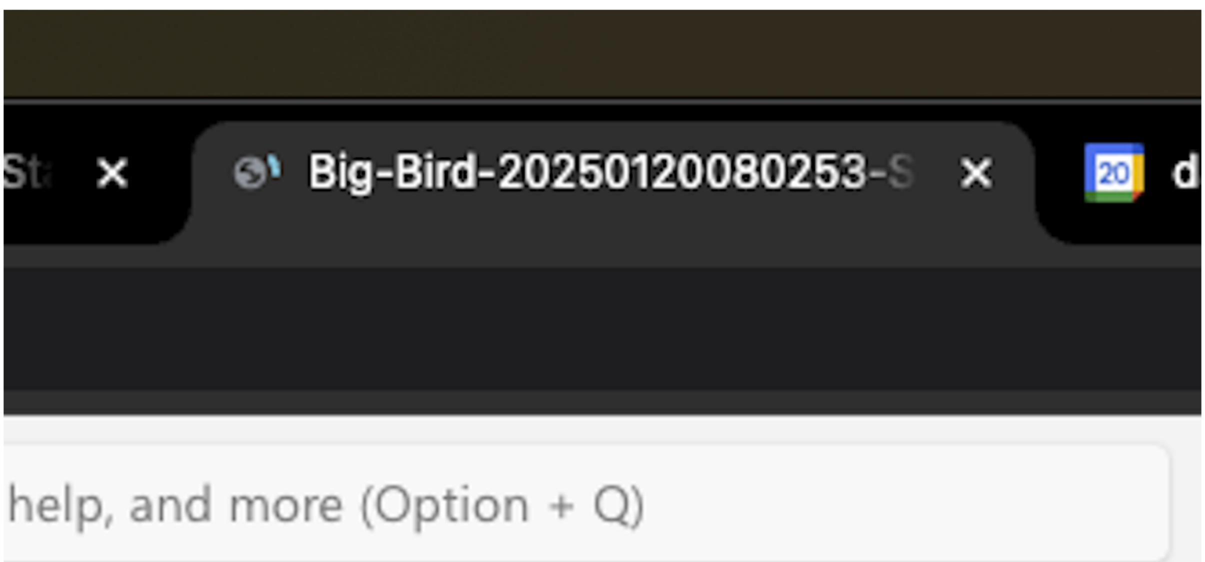
Optional Search for unfilled tags

If the record doesn't contain specific information the system will display any missing data in the below shown dropdown list.



STEP 31

Close the Tab and you're done



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