Document Templates

Begin with a template document that contains Word merge fields specific to the subject related to objects in ReadiNow.

Creating a new template document

To create a new template document:

1. Select Application Menu. The menu appears with available applications.
2. Select **Documents**. The application displays.
3. In the Left Navigation Area, select **Document Library**. The Document Library expands to display list.
4. Select **Documents**. The Documents report displays.
5. Select **+NEW**. The Document form displays.
6. In the **File** field, select the **Browse** button and navigate to the template document you want to upload.
7. Select **Save** to save the form.
8. In the Left Navigation Area, select **Report Templates**. The Report Templates report displays.
9. Select **+NEW**. The Report Template form displays
10. Type a Name for the template. Note: Ideally an action button friendly name as this is where they are used.
11. Select a Document from the document picker.
12. Select the target **Object** which is the start context for the document.
13. Select **Save** to save.

Modifying an existing template document

To modify an existing template document:

1. Select Application Menu. The menu appears with available applications.
2. Select **Documents**. The application displays.
3. In the Left Navigation Area, select **Document Library**. The Document Library expands to display list.
4. Select **Documents**. The Documents report displays.
5. Select the existing template document and select **ACTION**. The menu appears.
6. Select **Edit**. The form displays.

7. In the **File** field, select the **Browse** button and navigate to the updated template document you want to upload.
8. Select **Save** to save the form.