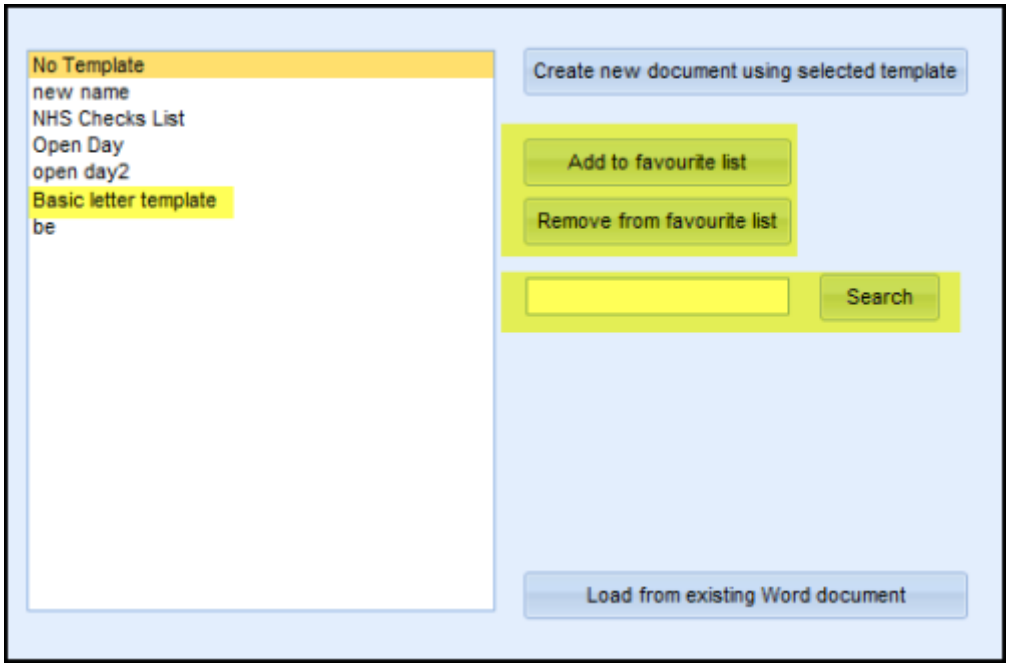
Document Templates Favourites/Search

Users can build own Document Templates “favourites” list and search this list.

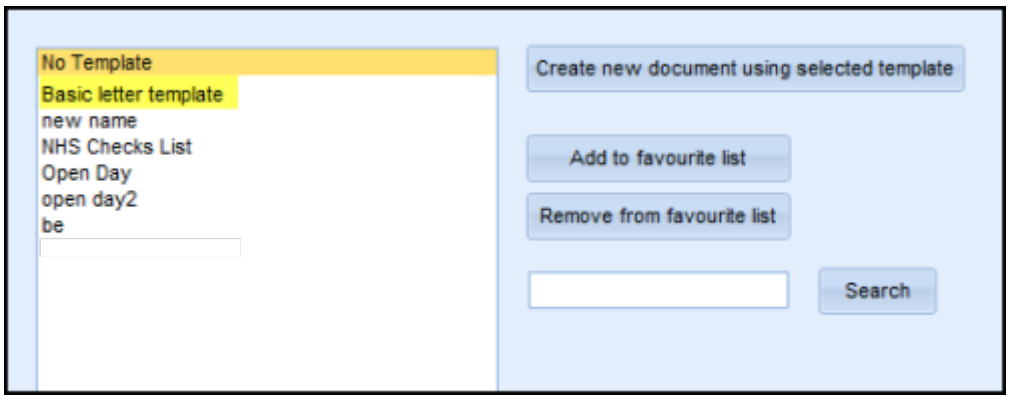
This feature is accessed from a Contact event window. For example - Person Record - Contact Event icon.

When using document templates;

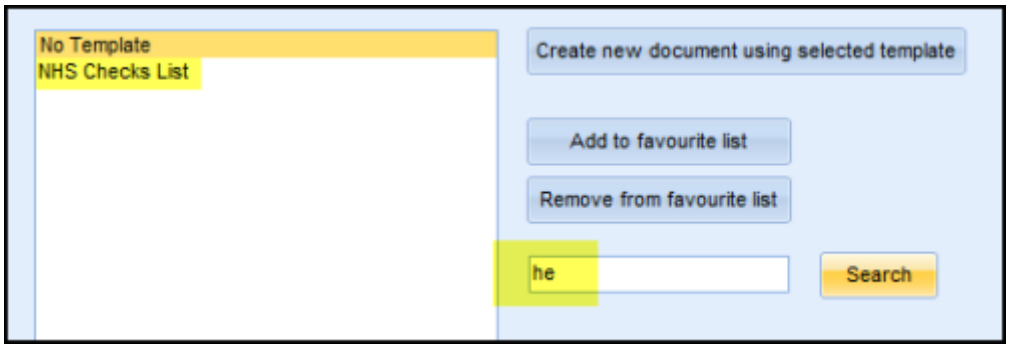


Clicking **Add to favourite list** will promote the template to nearer the top of the list the next time the list is accessed.

Remove from favourites list will return the template to its original order.



The search facility is a straightforward search of sequential characters inserted into the search window.



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