

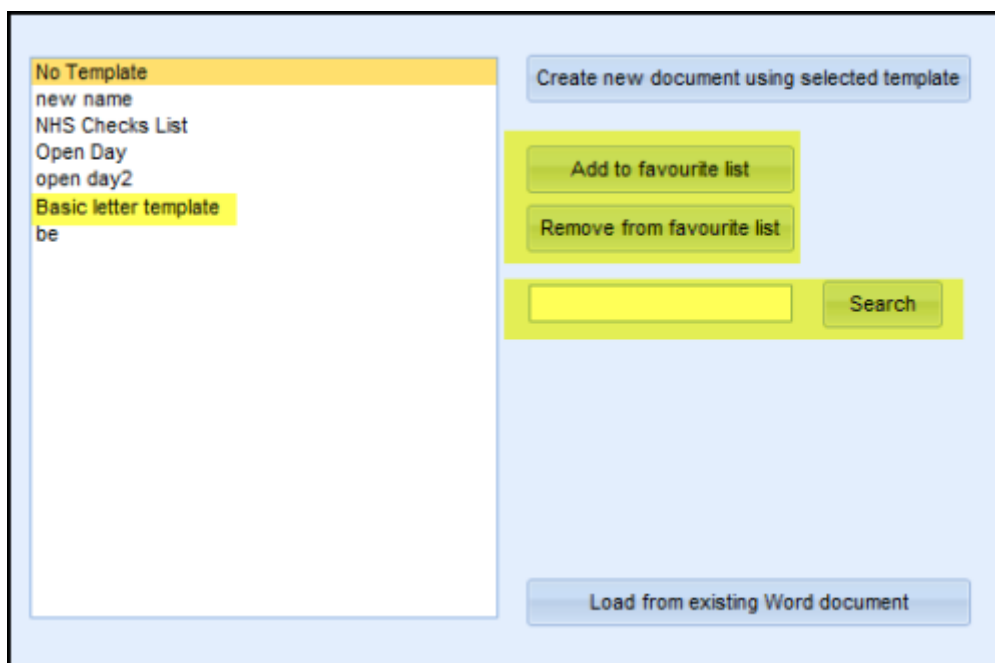


# Document Templates Favourites/Search

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

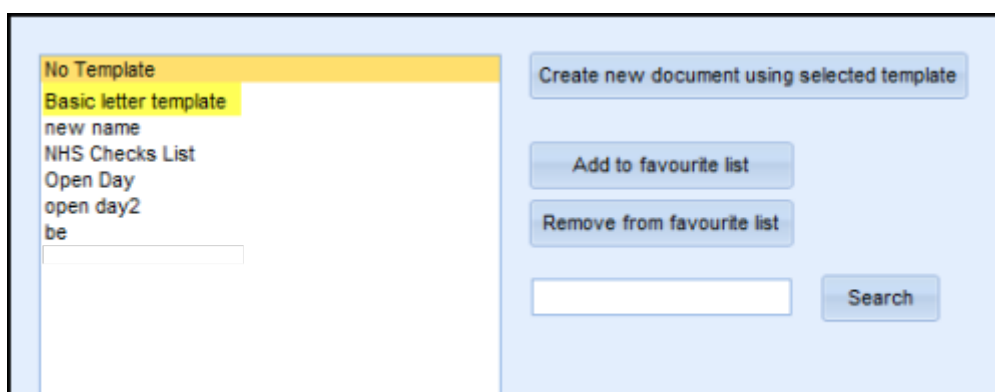
This feature is accessed from a Contact event window. For example - Person Record - Contact Event icon.

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.

A screenshot of a web application interface. On the left, there is a list of templates: 'No Template' and 'NHS Checks List'. The 'NHS Checks List' is highlighted in yellow. To the right of this list, there are several buttons: 'Create new document using selected template', 'Add to favourite list', and 'Remove from favourite list'. Below these buttons is a search bar with the text 'he' entered, and a yellow 'Search' button to its right.

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