Creating an RTF Template

Last Modified on 02/04/2025 4:25 pm EDT

Open Microsoft Word and design your template as desired OR copy an existing template (see load document below for where to find existing templates)

For any area where you would like information from the booking to print, use the corresponding insert field from the RenalPoint Add-ins Tab, colour insert fields and regular insert fields

Save your document as an RTF type

Load your document for use in the software
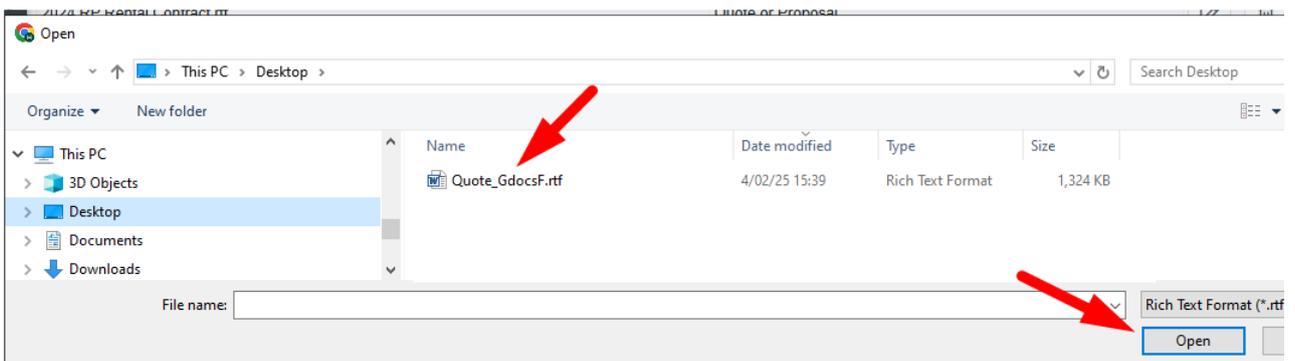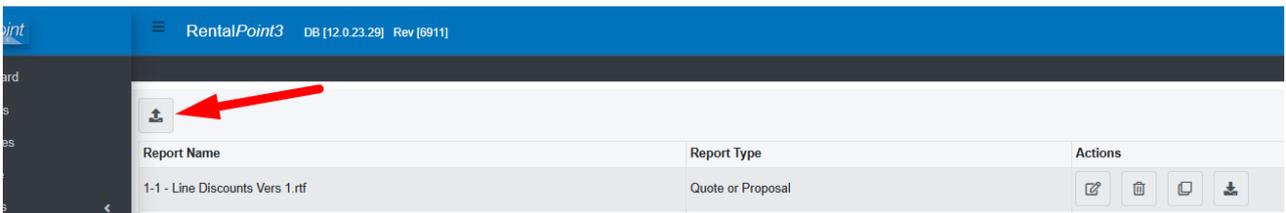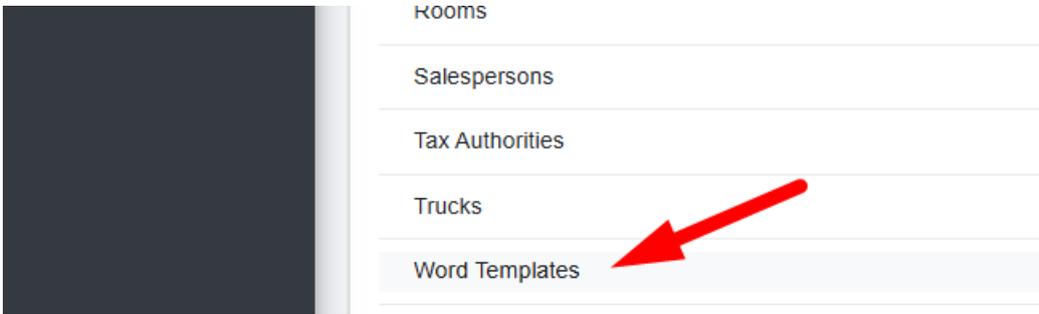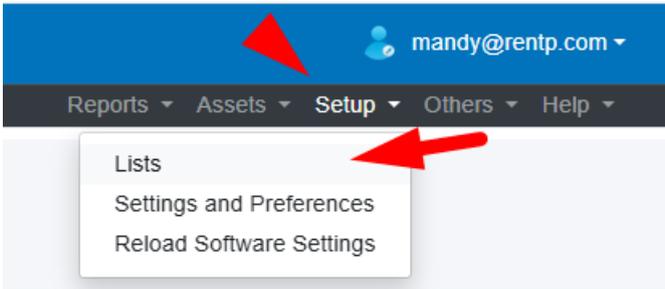
Edit the settings to set whether the template should be available from the Print->Quote or Print->Invoice option

Report Type

○ **Quotation / Proposal**
○ **Invoice**

✓

Report Type

● **Quotation / Proposal**
○ **Invoice**