

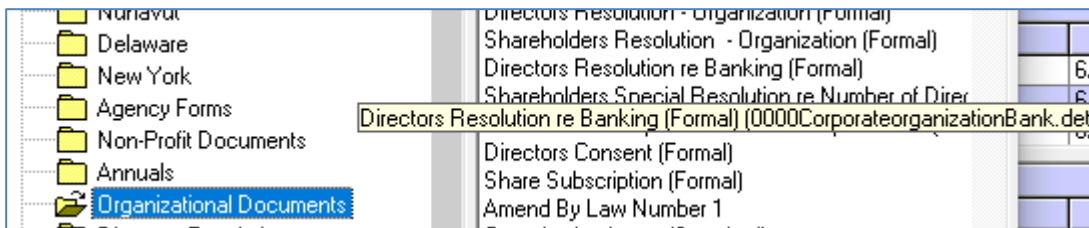
## Editing Existing Templates

**Note:** *It is important to create a backup of both the original and the final edited document. If the document is "broken" during editing, the original backup will still be available. After editing, any future updates from Emergent will overwrite the changes made during this process, unlike the Customize process.*

Follow this process when text, font, format or style changes are needed in existing documents.

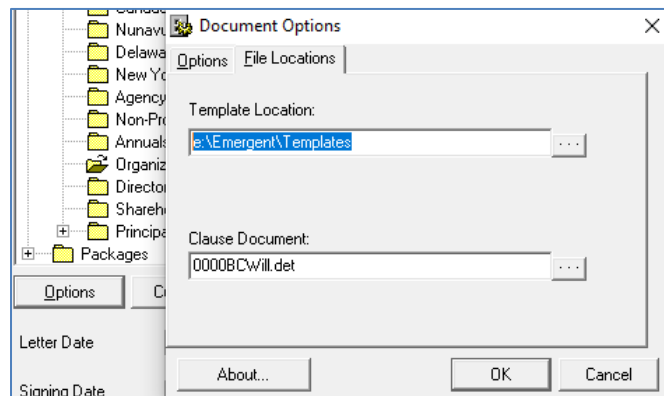
### Determine the name of the existing template

Click on the **Create Document** button from any record to open the Documents window. To determine the name of the existing template, hover over the document you want to edit, the yellow note will have the template name at the end of the line.



### Open the Templates Folder

All templates are located in one folder. Open the templates folder to access the documents by clicking on the **Options** button and **File Location** Tab. Highlight and copy the Folder address. Next go to **Start > Run** or open File Explorer and paste the Folder Address and click **OK**. This will open the Template Folder.



### Make a backup of the template you are about to change

When making a number of changes to a template, it is a good idea to make a backup copy before beginning. This will allow you to restore the original template if unexpected errors arise. One way of making a backup of a file is to right click on it and choose **Copy** and then right click anywhere in the **same** folder other than on a document and choose **Paste**. This will create "name - copy" of the file.

Make the required changes to the template and **Save**. You can change any part of the template, however, **do not make changes to the merge fields**. They are the values found between the markings <<●>>. These are the fields that will

populate the information from the database. You can remove them or move them within the document. **Do not add, remove or change any section breaks,** as section breaks contain critical information for the actions of the Template.

**Test your Template**

It is important to always test the Template after changes were made. Merge it and check for the expected changes. If the Template breaks, simply restore the backed up copy by deleting the broken template document and renaming the copy with the original file name.