# Summary Sheet

Importing Templates

Follow these instructions when importing a template that has been sourced from another location e.g. web page or healthcare provider eg a referral template:

1. Right Click on the template from the web page and select **'Save link as'** or **'Save target as'.**
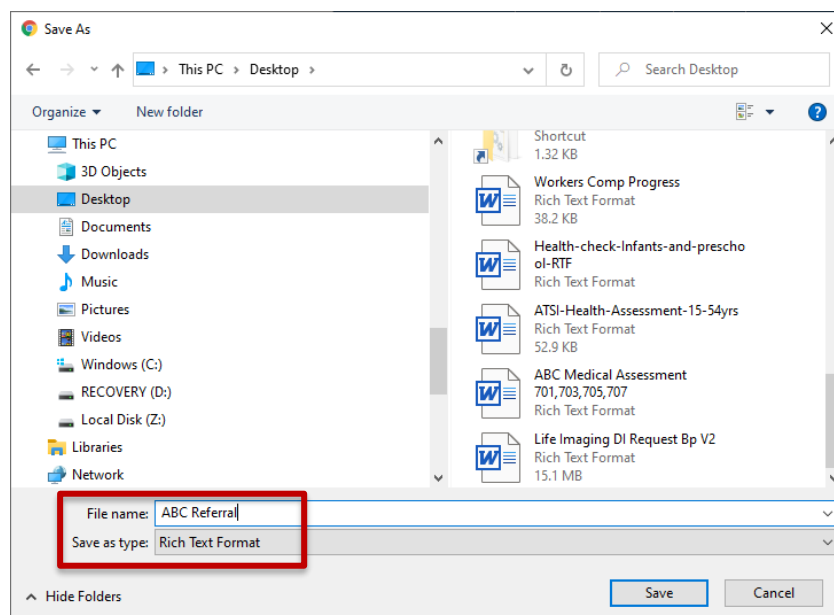
Note: The template must be in rich text format or word format – not pdf.

2. **Name the file** and **Save** this file to a drive / folder on your computer/desktop.
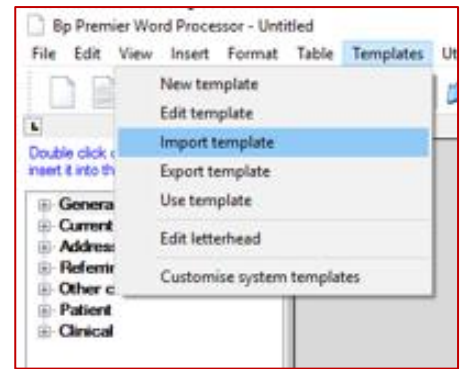**File Type** = Rich Text Format.
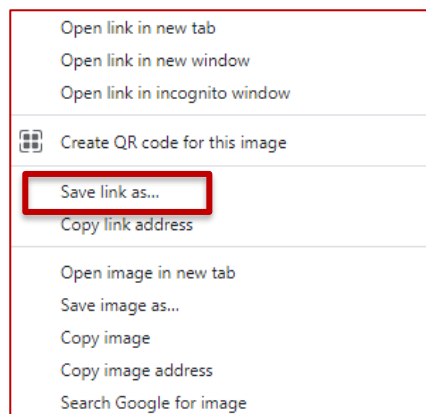
Important: Do not then double-click on this file from your computer as this will open it in Word and corrupt the fields.

3. **Open BP Premier** and open the Word Processor - **F4** or blank page icon.

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4. Select **Templates > Import Template** and navigate to where you saved the imported template eg. desktop.

5. **Modify the template (**if necessary).

6. Select **File > Save As** and name your template, ticking
'Available to all users' if you would like to share with others within the practice.

7. Save
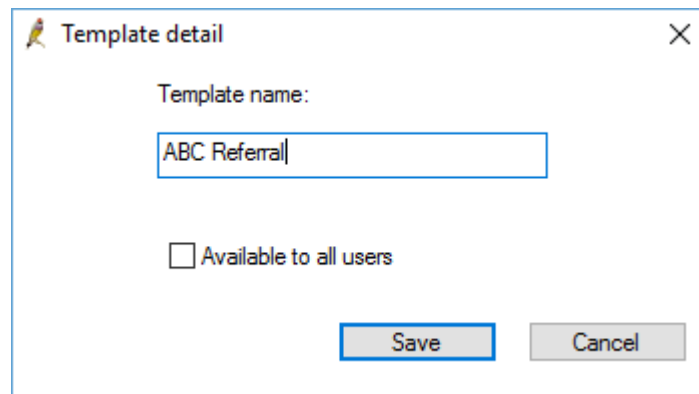
8. Your template will then be accessible in the **Template > Use Template** function (Custom) list.

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