



To add a header or footer to correspondence in SmartOffice:

- With a contact record open, select the **Letter Writing** button in the toolbar.
- In the **Letter Printing** options screen, select the **Create new Letter**, **Create Letter using Template**, and **Create Letter using RTF format** options.
- Select the **Display template and header/footer settings** option.
- The **Default Envelope, Header/Footer, Template Options** section will open in the **Letter Printing Options** screen.
- Add or make changes to a header, footer, or template by clicking on the appropriate link. Remove a header, footer, or template by clicking on the **Delete** button (trashcan) to the right of the entry.
- After selecting a link to add a header, footer, or template, SmartOffice will display a list of all document types that match the selected option.
- Select the header, footer, or template to be added to the typewritten correspondence by clicking on the appropriate link.
- The entry selected will be added to the **Default Envelope, Header/Footer, Template Options** section of the **Letter Printing Options** screen.

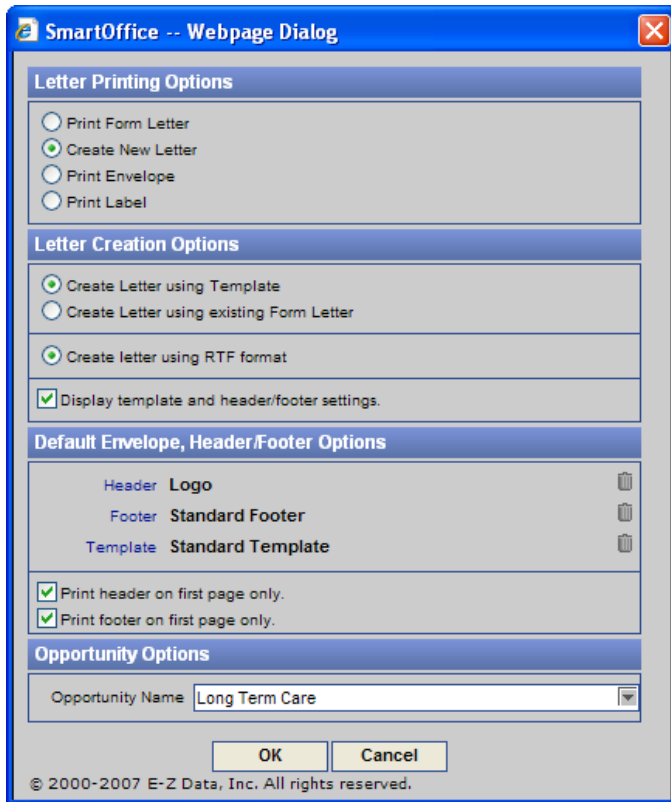


Figure 1: The Letter Printing Options window

- When you have finished adding a header, footer, and/or a template to your correspondence, click **OK**.
- SmartBinder will launch a Word document with your header, footer, and template choice(s) loaded.
- When the letter is complete, click the **Save Close** button to give the document a name, print the document, and save a copy of the document to the contact's Letter Log and SmartPad.

To create a custom header or footer for use with correspondence in SmartOffice:

- Select **Office Setup** in the side menu then select **Form Letters** in the Office Setup menu.
- Click the **Add** button in the **Search Form Letters** screen.
- In the **Select the Type of Document to be Created** screen, select the **Headers/Footers** and the **Create Letter using RTF format** options.
- Click **OK**.
- SmartBinder will launch a Word document with the **Header and Footer** tool active.
- Add text or graphics as desired to create the new header or footer.

*Note: By default, Wordbinder will open a Word document with a blank header. To create a footer as opposed to a header, click on the **Switch Between Header and Footer** button in the **Header and Footer** toolbar.*

- When you have finished creating the new header or footer, click the **Save Close** button on the Word toolbar.
- Give the new header or footer a title and keyword in the **SmartBinder** save window.

Note: It may be helpful to give a new header the key word of Header and a new footer the keyword of Footer for easy reference when adding headers and footers to typewritten correspondence.

- Click the **Save** button.
- The new header or footer will be saved in SmartOffice for future use with correspondence.

