Fast•Class File

SmartOffice

Volume 10: Using Headers and Footers

To add a header or footer to typewritten correspondence in SmartOffice -

• With a contact record open, select the Letter Writing button in the toolbar.

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- In the Letter Printing options screen, select the Create new Letter (Typewrite), Create Letter using Template, and Create Letter using MS Word options.
- Select the Show template and header/footer settings option.

🚰 SmartOffice Web Page Dialog	×
Letter Printing Options	
Create new Letter (Typewrite)	
C Print Form Letter	
C Print Envelope	
O Print Label	
Letter Creation Options	
Create Letter using Template	
C Create Letter using existing Form Letter	
Create Letter using MS Word	
C Create Letter using HTML Editor	
Show template and header/footer settings.	
	-
Opportunity Options	
Opportunity Name	-
· · · · · · · · · · · · · · · · · · ·	3
OK Cancel	
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- 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 hypertext link. Remove a header, footer, or template by clicking on the **Delete** button (trashcan) to the right of the entry.

Default Envelope, Header/Footer, Template Options		
Header	Û	
Footer	Û	
Template	Û	

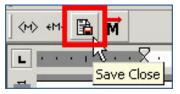
- After selecting a hypertext link to add a header, footer, or template, SmartOffice will display a list of all document types that match the selected option.
- Select the header, footer, or template to be added to the typewritten correspondence by clicking on the appropriate hypertext link.

Select Letter			+ 🥆 🗶 📇 🗮 🗙
Letter Title	Open	Keyword	Format
Standard Footer	1	Footer	MSWord
Standard Header	1	Header	MSWord

• The entry selected will be added to the **Default Envelope**, **Header**/Footer, **Template Options** section of the **Letter Printing Options** screen.

Default Envelope, Header/Footer, Template Options		
Header	Û	
Footer Standard Footer	Û	
Template	Û	

- When you have finished adding a header, footer, and/or a template to your correspondence, click **OK**.
- WordBinder 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 typewritten correspondence in SmartOffice –

- Select **Marketing** in the main menu then select **Form Letter Maintenance** in the Marketing 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 MS Word options.

elect the Type of Doc	ument to be Created
Form Letter	C Letter Template
Envelope	C Label
Headers/Footers	C Import Letter
Create Letter using MS Create Letter using HT	

- Click **OK**.
- WordBinder will launch a Word document with the **Header and Footer** tool active.

	▼ Header and Footer		
_ Header	In <u>s</u> ert AutoText +	🗌 🗃 🚰 😰 🔗 📭 🖶 🚟 류 🗛 Close	
!			

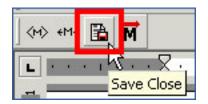
• Add text or graphics as desired to create the new header or footer.

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.

eader and Footer	
Insert AutoText 🕶	/ 🖽 🚱 😰 🔗 📭 🗄 👯 🧮 🗗 🖏 Gose
	N. Contraction of the second s
	Switch Between Header



• 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 **WordBinder** save window.

W WordBin	der 🔀
Title	Logo
Keyword	Header
Category	•
Purpose	•
🥅 Private	
	Save Cancel
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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 typewritten correspondence.

