

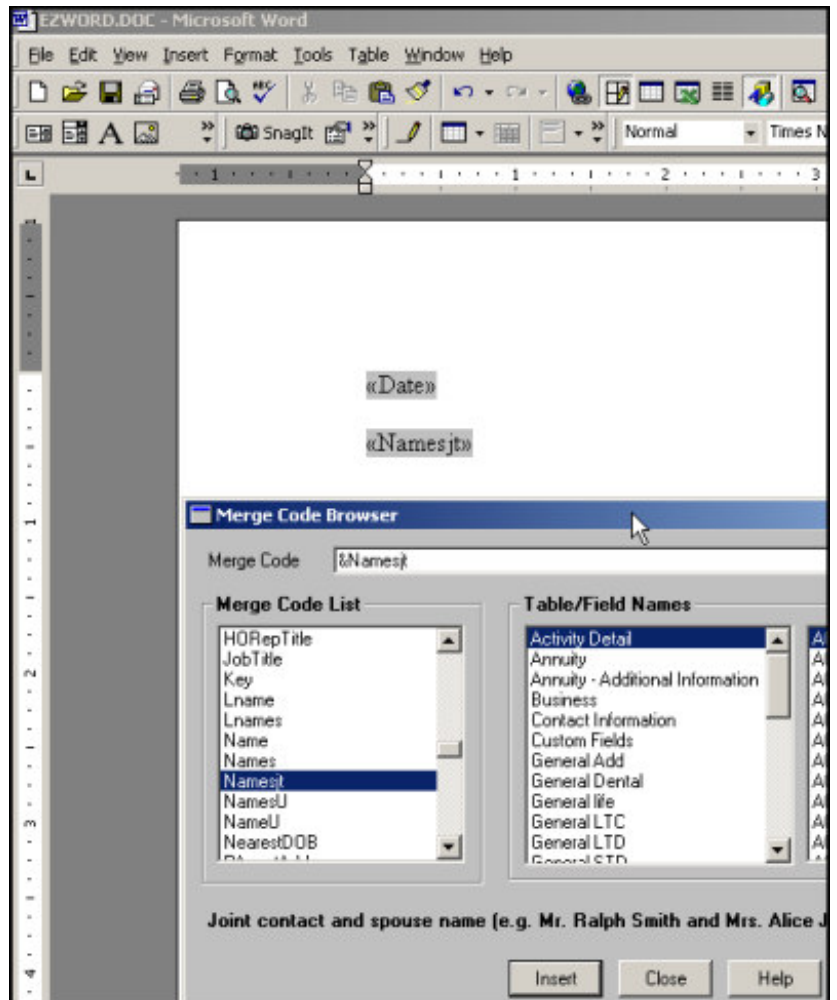


Creating Letter Templates in EZ-Word

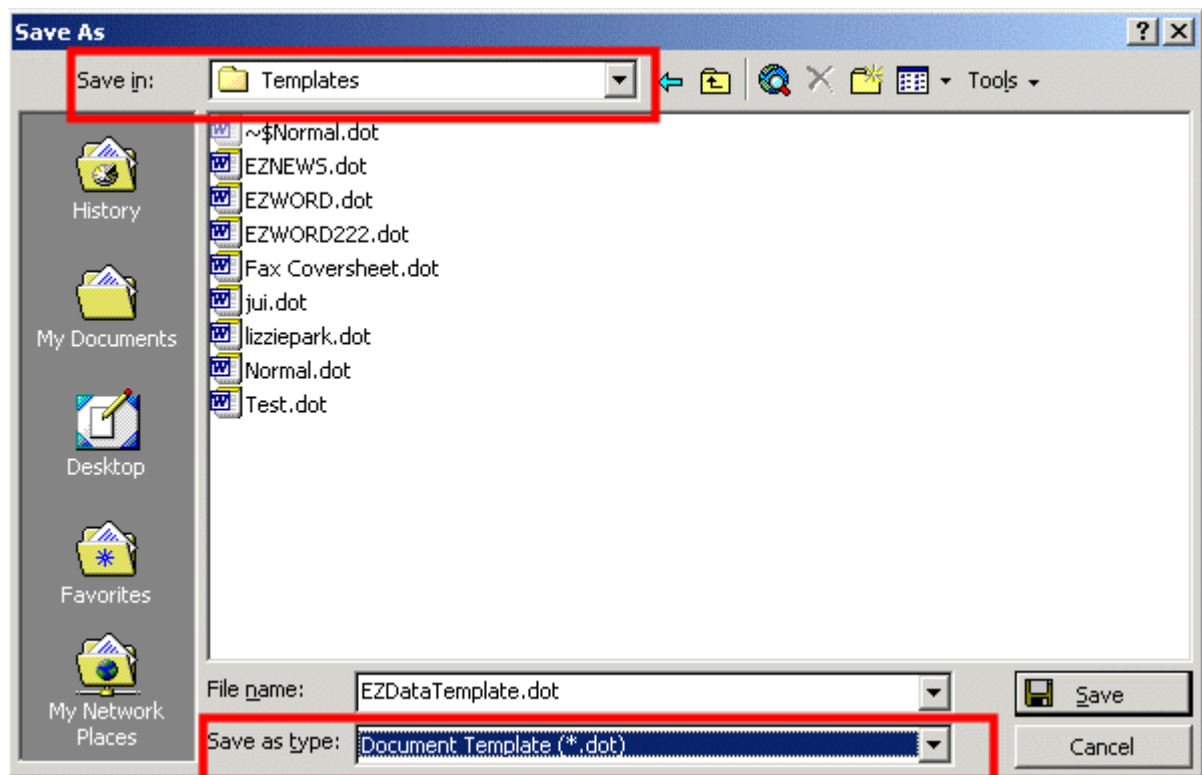
Document templates speed the letter writing process by allowing you to “program” certain information to appear automatically each time you write a letter (e.g., your company logo, the current date, the letter salutation and closing, etc.). All you have to do is type the body of the letter and you’re finished! In the last issue of EZ-News, we created letter templates using EZ-Editor. In this issue, we are going to create them using EZ-Word.

We’ll walk you through adding a customized EZ-Word template to your system.

1. Open up EZ-Word from within CDS.
2. Create the EZ-Word document you want to save as a template.
3. When you are done creating the template, select Save As from the File menu.



4. Enter a unique File name and click on the Save As Type drop-down arrow to select the Document Template (.dot) option. Click on the Save button and close MS-Word.



5. Now let's use the template. Go to a Contact record and click on the Letters icon.

Client Data System - DEMO:DEMO

File Edit Record View Tools Reports Toolbar Window Help

Contact - Mr Joe M. Ackerman, M.D. (50)

Summary Personal Add'l. Personal Key Relations Benefits Custom Fields

Personal Information

Last Name	Ackerman	M.D.
First Name/MI	Joe	M.
Greeting	Joe	Title Mr
Type/Sub	Client	A
Source/Sub	S. Thompson	Refer
Birth Date	02/27/1950	Age 52
Gender	Male	Tobacco No
Marital	Married	Child# 2
SS#	576-09-4321	Mail To Preferred
Drivers Lic.#		Lic.State
House Member	Head	

No Contact By Phone Mail E-Mail

Business Information

Business Name	Joseph M. Ackerman, M.D., Inc.
Occupation	Physician/Surgeon
Job Title	
E-mail...	Jackerman@ackerman.cds, lizpark@aol.
Web Site...	www.ez-data.com

Address

Description	Street	City	Zip
Residence	485 S. Oakland Avenue	Pasadena	91101
Business	144 Wilshire Blvd., Suite 250	Los Angeles	90007
Residence	11111 ABC Street	Pasadena Hills	63121

Phone Numbers

Description	Phone#	Preferred
Business	(310)-839-3839#3453	<input checked="" type="checkbox"/>
Fax	(310)-839-3840	<input type="checkbox"/>
Residence	(626)-799-2951	<input type="checkbox"/>
Fax	(555)-411-2222	<input type="checkbox"/>
Car	(532)-489-7878	<input type="checkbox"/>

Miscellaneous Information

ComissionsDuts	
FileIN	
FileAudited	

Enter the contact's last name: Joe M. Ackerman, M.D. 11/15/2002 10:57AM Timer

6. Click the Options button from the Letters window.

Letters

Letter Writing Options

Typewrite Letter

Letter Log

Letter Printing Options

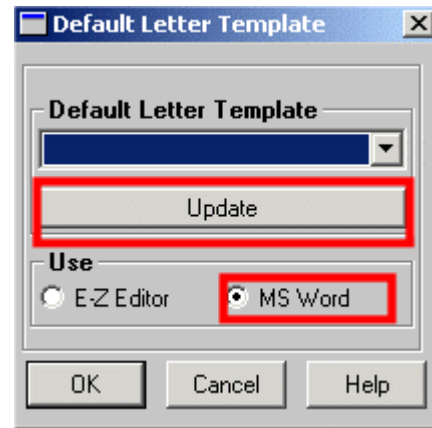
Form Letter

Envelope

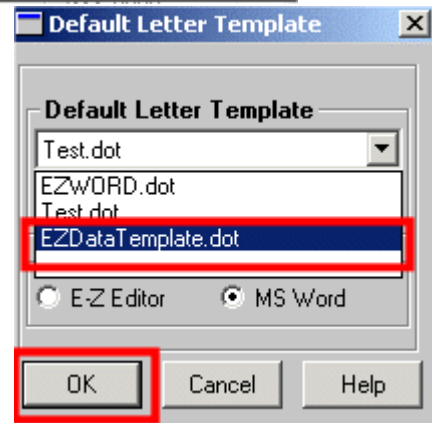
Form Letter and Envelope

Options Cancel Help

7. Make sure that MS-Word is selected and click Update. After you click on Update, another window will pop up, click Yes to proceed with the template update.



8. Select the new template from the Default Letter Template drop-down list and click OK to save the changes.



9. Now when you select the Typewrite option (or when you create a new form letter from the Desktop), your default template text will appear on the screen.



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