

# Formatting Tips

## Working with MS Word

A guide to working with documents  
based on APPS FOR OFFICE  
templates

## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
  1. Fix a Hidden Picture using a Style
  2. Fix a Hidden Picture by Modifying a Style
  3. Working with Snipped Pictures
- Managing Content
- Templates and Macros
- Useful Software
- Working with Documents

### TIP – Details Table of Contents

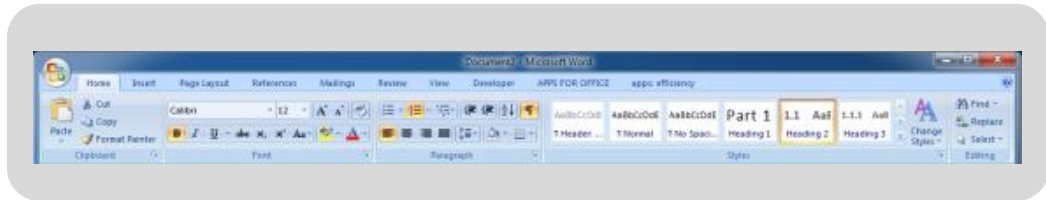
Refer the end of this document for a detailed table of contents will additional headings.

## USEFUL STYLES

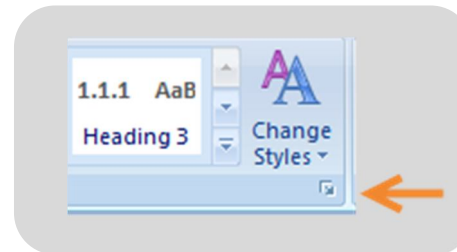
Styles used for different formatting requirements in documents created from APPS FOR OFFICE templates

### 1. Display the Style pane

- Click the **Home** tab



- Click the 'styles' arrow beneath the **Change Styles** button



## QUICK START LIST

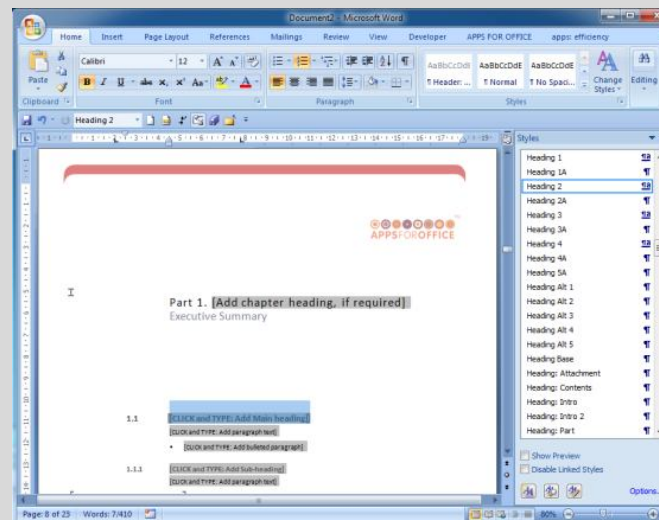
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### TIP – Create Macros to apply styles

You save time selecting styles from the Style pane by applying styles using apps FREE, or record your own macro.

refer [Templates and Macros, 2 Record a Macro to apply a Style](#)

The Styles Pane is displayed



## QUICK START LIST

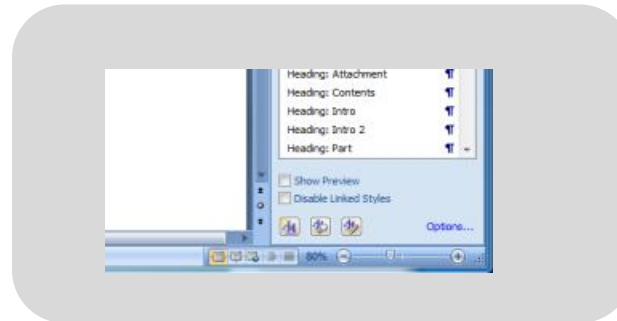
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### TIP – Create Macros to apply styles

You save time selecting styles from the Style pane by applying styles using apps FREE, or record your own macro.

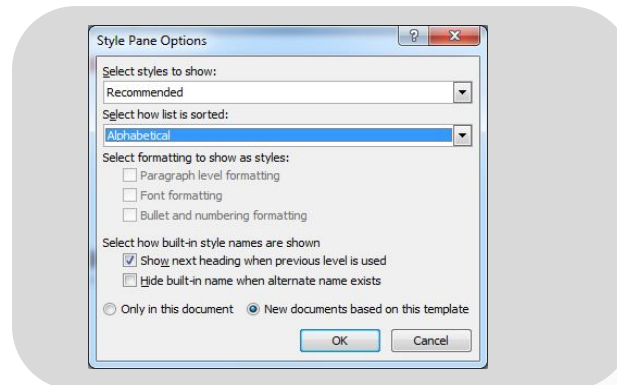
refer [Templates and Macros, 2 Record a Macro to apply a Style](#)

- To sort the styles, click the **Options ...** button



The **Style Pane Options** screen is displayed.

- Select **Alphabetical** from the second drop down list.



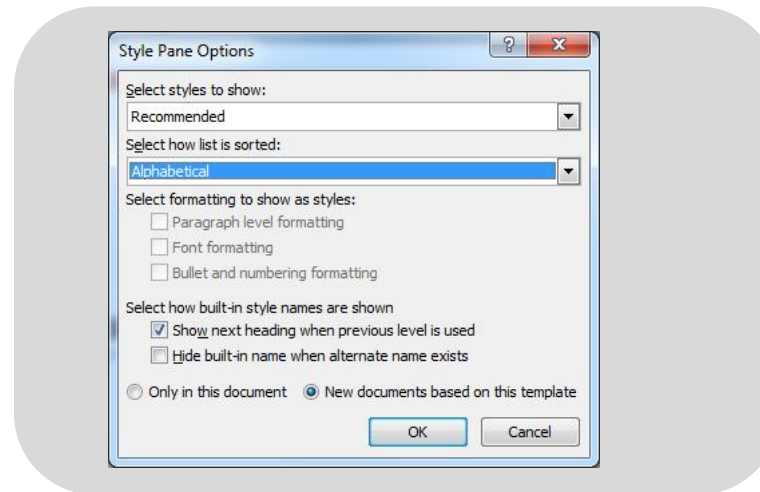
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### TIP – Can't find a style?

Word will sometimes hide styles, at the base of the **Style pane**, next to the **Options...** button, click the **Manage Styles** button. Select the **Recommend** tab, and locate the missing style, and select **Show**.

- Select **New documents based on this template**



- Click **OK**

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### TIP –Promote/Demote Heading Styles

Use the Outline Promote and Demote buttons to change the list or heading styles to the next level up or down the series.

## 2. Heading Styles

Key heading styles to use when formatting text.

Style Name	Description
<b>Heading #</b>	<ul style="list-style-type: none"> <li>• Heading 1 title or chapter heading</li> <li>• Heading 2 most frequently used heading</li> <li>• Heading 3 sub-heading, or numbered paragraph</li> </ul>
	In some templates and documents, heading styles are defined as numbered paragraphs to provide a multi-level numbered list structure that will renumber predictably and reliably.
<b>Heading #A</b>	Heading styles defined to look like the main headings that will not be displayed in the Table of Contents
<b>Heading #Alt</b>	If your Heading styles are numbered, the Alt Heading styles will not be numbered, and vice versa



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### **TIP –Promote/Demote Heading Styles**

Use the Outline Promote and Demote buttons to change the list or heading styles to the next level up or down the series.

### 3. Paragraph Styles

The base paragraph formatting style includes Body Text, List Bullet 1+, List Text 1+, List Hang 1+.

When using the list paragraph styles, always start with the first numbered style in the series (such as List Bullet 1) and then demote as required.

Ignore the non-numbered style in the list. For example, do not use, List Bullet), List Text, and List Hang as these styles will not work predictably with the promote and demote buttons.

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### TIP – apps FREE

apps FREE and apps Efficiency provide short cut buttons to the styles you need. Refer [Useful Software](#) for more details

## 4. Paragraph Styles (cont.)

Style Name	Description
<b>Body Text</b>	<p>Plain paragraph text.</p> <p>Body Text style usually has space above the paragraph and below defined as well as space between the line lines of text in the paragraph (line spacing).</p> <p>Use this style instead of Normal style.</p>
<b>List Bullet 1</b>	Bulleted list (ignore the un-numbered style List Bullet)
<b>List Text 1</b>	Indented text (ignore the un-numbered style List Text)
<b>List Hang 1</b>	<p>Text that wraps like a bullet paragraph without the bullet symbol – allowing you to add your own symbol or number. (Ignore the un-numbered style List Hang).</p> <p>Also useful for numbered paragraphs copied in using the PasteUnformatted button</p>
<b>Normal (Base)</b>	Use only when you require a plain paragraph at the end of a section, or after a table. If Normal (Base ) doesn't exist, use the Normal style.





## QUICK START LIST

- **Open a document or template**
- **Useful Styles**
  1. Display the Style pane
  2. Heading Styles
  3. Paragraph Styles
  4. Special Formatting Styles
  5. Colors that match your Logo
  6. How to fix formatting that looks wrong
  7. Display the Style label on the Quick Access Toolbar
- **Working with Pictures**
- **Managing Content**
- **Useful Software**
- **Working with Documents**

### 4. Special Formatting Styles

Each of these styles series have the same style series as the paragraph text style series: List Bullet 1+, List Text 1+, List Hang 1+.

List the paragraph styles, always start with the first numbered style in the series (such as List Bullet 1) and then demote as required.

Ignore the non-numbered style in the list (such as, List Bullet).

Style Name prefix	Description
Clause	Legislation text.
Legislation	Legislation heading styles
Question	Proposal question text.
Table	Text in tables.
Text Box	Text in text boxes.



# USEFUL STYLES

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## QUICK START LIST

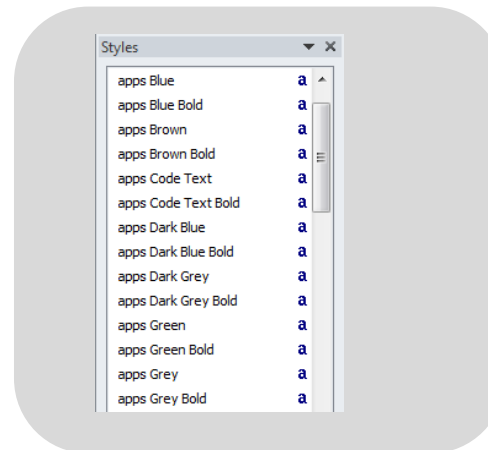
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### 5. Colors that match your Logo

Some styles are matched to your logo, or the main color theme of the template, like Headings, Cover, and bullet symbols.

In addition there are styles that start with either “apps “ or your company name, followed by a color, such as, apps Blue, or if your company name is ABC Pty Ltd, “ABC Blue”.

Use these styles when you need to **emphasise text** in a paragraph instead of using the Microsoft color palette.





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### TIP – What style for Paragraph Text?

Use the Body Text style. Try and avoid using the Normal style.

## 6. How to fix formatting that looks wrong

- First, assume that the paragraph has been changed using the formatting buttons on the **Home** tab.
- Select the paragraph, and press **Ctrl + Space** on the keyboard.
- If the paragraph changes have also been made to the line spacing, also click “Clear All” at the top of the style pane.
- Determine what kind of paragraph it is. For example, is it a heading, a general paragraph, a bulleted list, legislation text.
- Review the styles described earlier in this instruction sheet and choose the matching style.
- Another way, is to click in a paragraph that looks like how you want this faulty paragraph to look, and scroll down the style list to see which style is applied – it will have a blue box around it.



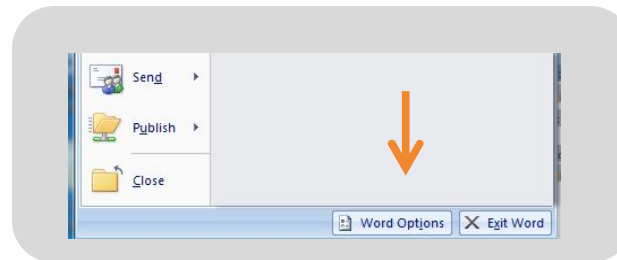
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### 7. Display the Style label on the Quick Access Toolbar

The style label field is a useful command that you can add to the Quick Access Toolbar. It tells you which style is applied to the currently selected paragraph.

- Select the **Word Start** button (next to the **Home** tab)
- Select **Word Options**



The **Word Option** screen is displayed.



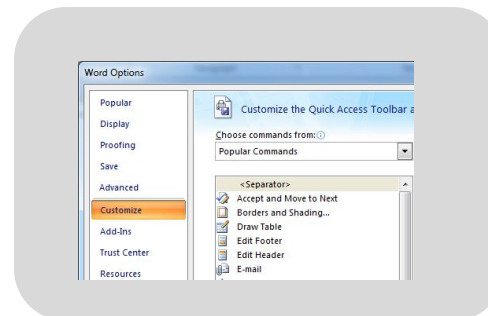
# USEFUL STYLES

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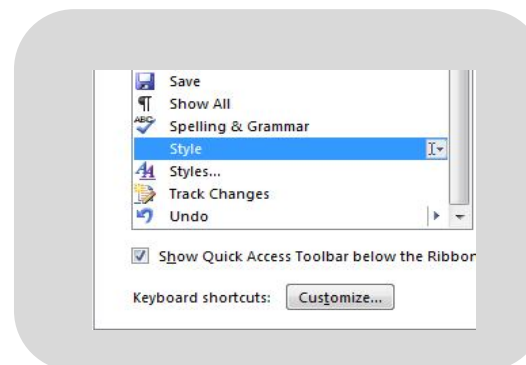
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- Select **Customize**



- Scroll down the command list, and select **Style**





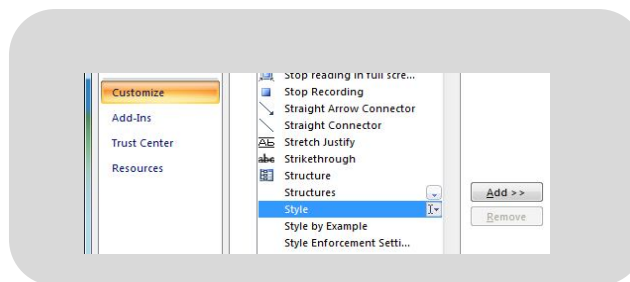
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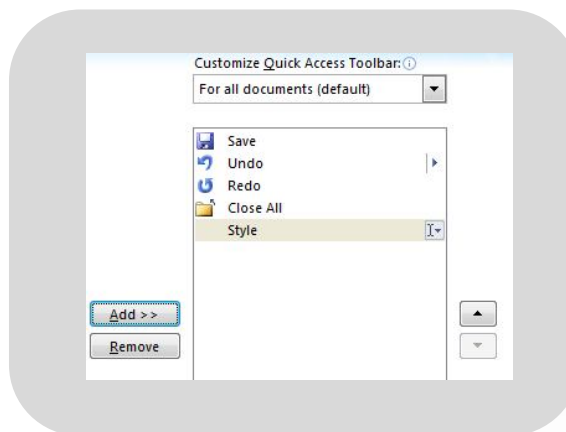
### TIP – Add New Document to QAT

Another useful command that you can add to the QAT is New Blank Document. Click it and it

- Click the **Add** button



- The Style label will be added to the right panel which lists the commands visible on the QAT, will now be listed on the right panel.



- Click **OK**



# USEFUL STYLES

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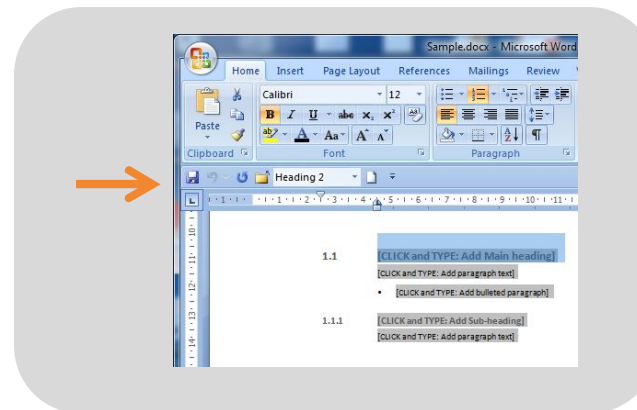
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- The Quick Access Toolbar is displayed with the new button.



Notice that the style label field is displaying the style name applied to the selected paragraph.

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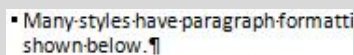
# WORKING WITH PICTURES

Styles used for different formatting requirements in documents created from APPS FOR OFFICE templates

## 1. Fix a Hidden Picture using a Style

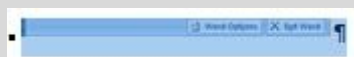
When pictures are added to a paragraph the paragraph formatting must be set to “At Least” line spacing.

Many styles have paragraph formatting line spacing set to “Exactly”, and if it is, the inline picture will be hidden, as shown below. You only see the bottom of the picture.



To display the entire picture:

- Select the picture and the paragraph





# WORKING WITH PICTURES

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## QUICK START LIST

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### TIP – The Body Text: Picture style doesn't exist

If the style doesn't exist, refer [Working with Pictures 2 Fix a Hidden Picture by Modifying a Style](#) for instructions on how to modify the style settings to enable the whole picture to be visible.

- Check your style list for a style called “**Body Text: Picture**”  
If the style exists, apply to the selected paragraph.



# WORKING WITH PICTURES page 18 / 67

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Another useful command that you can add to the QAT is New Blank Document. Click it and it

## 2. Fix a Hidden Picture by Modifying a Style

The style you need to use for an inline picture can vary depending on what you are needing to do. Try and use the same style for all your inline pictures so they have a consistent left hand margin.

You might want to use any of these styles:

- **Normal or Normal (base)**

Use this style if the picture requires the full page width.

- **Body Text**

The picture is in line with general paragraph text.

- **List Text 1+**

The picture is aligned with indented text, for example, under a bullet, or numbered list.

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## QUICK START LIST

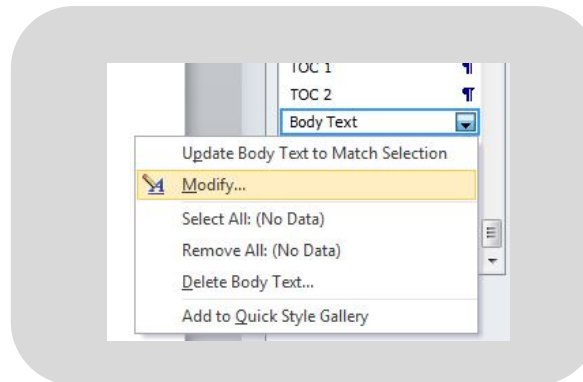
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### TIP – Add New Document to QAT

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## 2.1 Apply the style to the paragraph

- Select the paragraph with the picture – make sure the paragraph mark is selected.
- Locate the style you want to use in the style pane list.  
If you are unsure, use the **Body Text** style.



- Click the drop down arrow to the right of the style name, and select **Modify ...**  
The **Modify Style** screen is displayed for the selected style.

# WORKING WITH PICTURES

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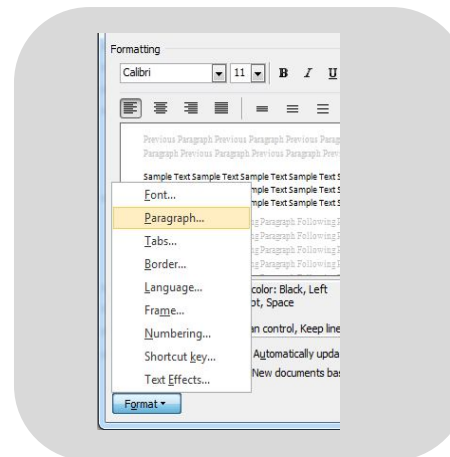
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- Select **Format > Paragraph ...**



# WORKING WITH PICTURES

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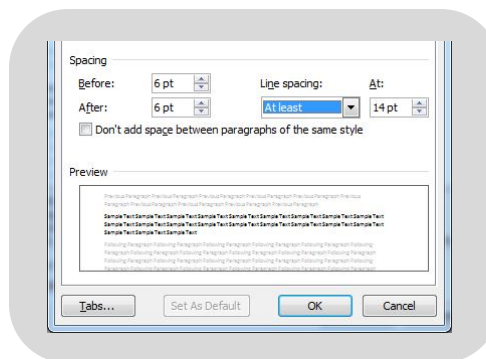
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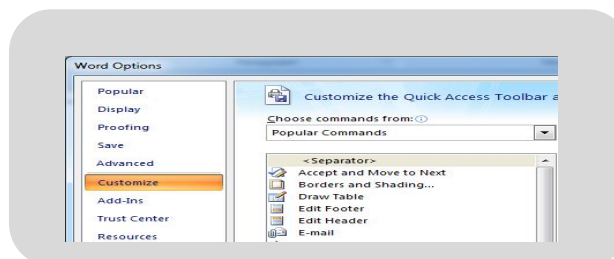
Another useful command that you can add to the QAT is New Blank Document. Click it and it

- Change the **Line spacing** field to “At Least”



- Click **OK**

Inline pictures in paragraphs with the Body Text style will now display in full.



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## 3. Working with Snipped Pictures

If you work with documents that require you to add snipped graphics, such as extracts of letters, these can make your document look unruly.

To minimise the inconsistencies these snipped graphics cause, follow these rules:

- Decide on a buffer to the left of the content of around 1 cm.  
When snipping content with text start your snip selection 1 cm to the left of the text.
- Include the buffer when selecting your snipped content.
- Click in an empty paragraph (no text), and apply the style you want, refer Working with Pictures, 2 Fix a Hidden Picture by Modifying a Style above.  
It is recommended that you use the same style for all snipped paragraphs.
- Paste your graphic, using a normal paste, such as **Ctrl + V**
- The 1cm white space buffer you selected with your snip, will cause the graphic to look indented 1cm. This visually distinguishes the snipped content from the authored content.

## QUICK START LIST

- Open a document or template
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- Managing Content
  1. Replace style applied throughout document (Global Replace)
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  3. Manage Page Breaks
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### TIP – Global Replace

We recommend that you save a copy of your document before performing a global replace.



# MANAGING CONTENT

Tips to use when amalgamating content from various source documents into one target document

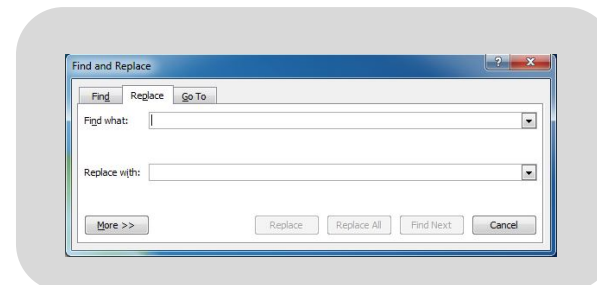
## 1. Replace style applied throughout document (Global Replace)

When paragraphs with the same style throughout a document do not appear to display the same formatting characteristics, inconsistencies can be corrected by reapplying the style to each paragraph.

A quick way to do this is to perform a global Style Replace, which finds all paragraphs with the style applied and reapplies it.

- Press **Ctrl+H** on the keyboard.

The **Find and Replace** screen is displayed.



- Click in the **Find what** field
- Click the **More >>** button

# MANAGING CONTENT

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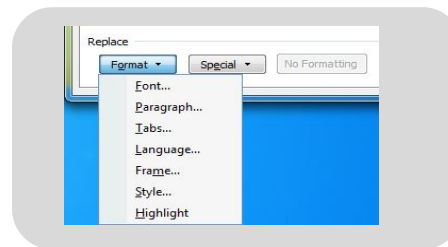
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### TIP – Add New Document to QAT

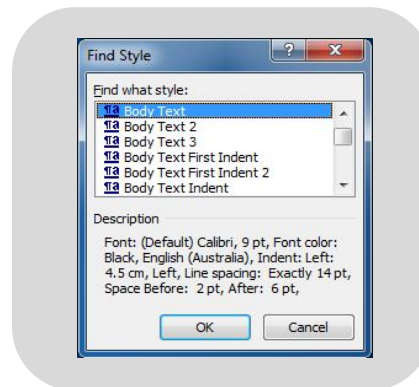
Another useful command that you can add to the QAT is New Blank Document. Click it and it

- Click the **Format** button
- Select **Style...** from the format menu



The **Find Style** screen is displayed.

- Select the style you want to reapply throughout your document. For example, Body Text.





# MANAGING CONTENT page 25 / 67

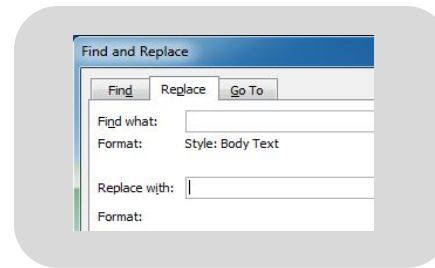
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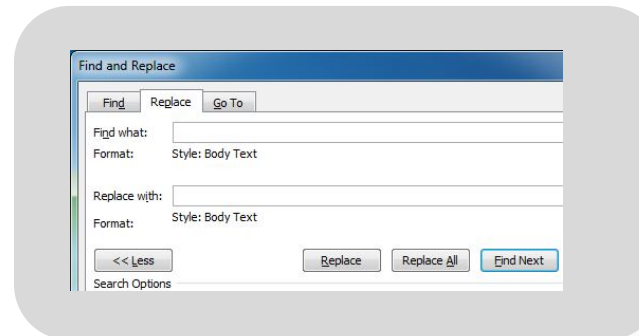
### TIP – Add New Document to QAT

Another useful command that you can add to the QAT is New Blank Document. Click it and it

- Click **OK**



- Click in the **Replace with** field
- Click **Format > Paragraph > Style**, and select the same style that you selected for the **Find what** field.





# MANAGING CONTENT

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## QUICK START LIST

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### TIP – Save your document first

When many updates are made throughout the document, Word may not be able to undo the update – so always Save your document before clicking Replace All.

There are two ways to proceed:

- One at a time  
Press **Find Next**, Word will select the next paragraph it finds with the selected style applied, then select **Replace**, and revise the result.  
If you do not have the expected result, you can correct it by pressing **Ctrl+Z** to undo the last update.
- All at once  
Press **Replace All**, Word will find every paragraph with the selected style and reapply the style to those paragraphs. Revise the result.  
If you do not have the expected result, you can correct it by pressing **Ctrl+Z** to undo all the updates.



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- **Managing Content**
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## 2. Copying and Pasting

### 2.1 Copying and pasting in one document

- Select the content, and include the paragraph mark
- Press **Ctrl+C**, to copy the content.
- Click where you want to add the copied content
- Press **Enter** a few times to create three empty paragraph marks
- Select the empty paragraphs and press **Ctrl+Space** to remove any manual formatting, and apply the **Body Text** style.
- Click in the middle empty paragraph.
- Press **Ctrl+V** to paste the content; unless the document has been compromised, the original formatting will be retained.
- Remove the empty paragraph marks above and below the newly pasted content

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**TIP – Use the Paste Unformatted button**  
apps FREE has a shortcut button for Paste Unformatted, and Keep With Next.

## 2.2 Copying content from one another document to another:

- Select the content in the first (source) document, and include the paragraph mark
- Press **Ctrl+C**, to copy the content.
- Find the location in the second (destination) document that you want to paste the copied content into.
- Click where you want to add the copied content
- Press **Enter** a few times to create three empty paragraph marks
- Select the empty paragraphs and press **Ctrl+Space** to remove any manual formatting, and apply the **Body Text** style, or the style that needs to be applied to most of the paragraphs that you have copied.
- Click in the middle empty paragraph.
- Select **Home (tab) > Paste (button) > Paste Special >** and select **Unformatted text**
- The copied content will be added to the selection point.
- Select individual paragraphs and apply the required styles as required.

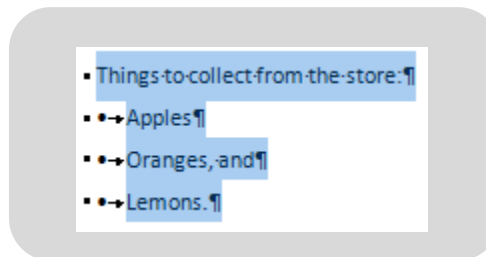
## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
  1. Replace style applied throughout document (Global Replace)
  2. Copying and Pasting
  3. Manage Page Breaks
- Templates and Macros
- Useful Software
- Working with Documents

**TIP – Use the Paste Unformatted button**  
apps FREE has a shortcut button for Paste Unformatted, and Keep With Next.

### 2.3 Clean up lists, when using Paste Unformatted

- Pasting a list using paste unformatted will leave excess tab marks that you need to clean up manually.
- To help you work more efficiently follow the steps described below.
- Select the paragraphs you want to copy.



Press **Ctrl + C** to copy the selection.

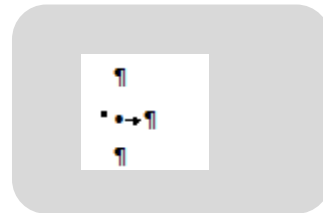
- Click in the target document where you want to paste the copied content.  
Make sure your selected paragraph does not have text in it.

## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
  1. Replace style applied throughout document (Global Replace)
  2. Copying and Pasting
  3. Manage Page Breaks
- Templates and Macros
- Useful Software
- Working with Documents

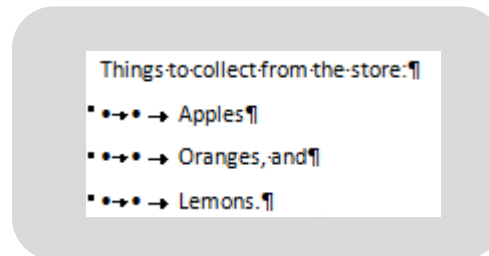
**TIP – Use the Paste Unformatted button**  
apps FREE ([www.appsforoffice.com](http://www.appsforoffice.com)) has a shortcut button for Paste Unformatted, and Keep With Next.

- Select the style you want applied to most of the paragraphs, such as **List Bullet 1**



- Click **Home > Paste > Paste Special > Unformatted text**
- Click **OK**

The pasted list is now a mixture of automatic bullets applied by the List bullet 1 style and hard coded text bullets and tabs converted from the copied bulleted list.





# MANAGING CONTENT

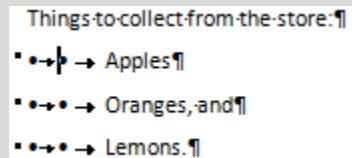
page 31 / 67

## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
  1. Replace style applied throughout document (Global Replace)
  2. Copying and Pasting
  3. Manage Page Breaks
- Templates and Macros
- Useful Software
- Working with Documents

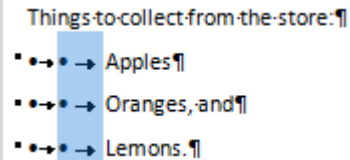
**TIP** – Use the **Paste Unformatted** button apps FREE has a shortcut button for Paste Unformatted, and Keep With Next.

- Clean up the hard coded bullet symbols and tabs by doing a 'vertical selection':
  - Click at the start of the first bullet



Things-to-collect-from-the-store:¶  
▪→ Apples¶  
▪→ Oranges,and¶  
▪→ Lemons.¶

- Hold down the **Alt** key, on your keyboard and **left click and drag** down the list but only to include the symbols and tabs.



Things-to-collect-from-the-store:¶  
▪→ Apples¶  
▪→ Oranges,and¶  
▪→ Lemons.¶

- Press the **Delete** key.

# MANAGING CONTENT

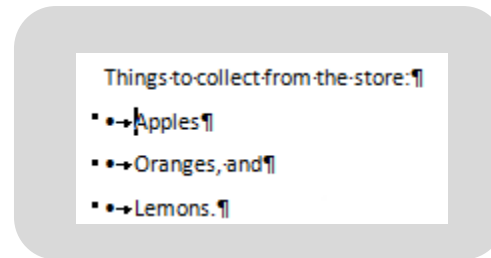
page 32 / 67

## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
  1. Replace style applied throughout document (Global Replace)
  2. Copying and Pasting
  3. Manage Page Breaks
- Templates and Macros
- Useful Software
- Working with Documents

**TIP – Use the Paste Unformatted button**  
apps FREE has a shortcut button for Paste Unformatted, and Keep With Next.

The selected symbols and tabs are deleted.







# MANAGING CONTENT page 33 / 67

## QUICK START LIST

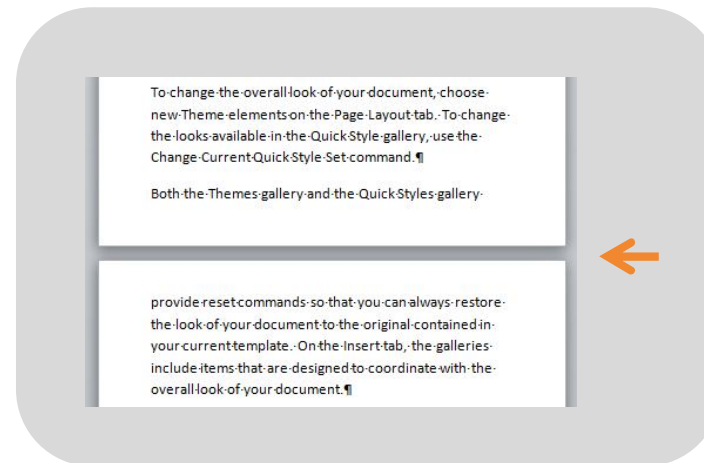
- Open a document or template
- Useful Styles
- Working with Pictures
- **Managing Content**
  1. Replace style applied throughout document (Global Replace)
  2. Copying and Pasting
  3. Manage Page Breaks
- Templates and Macros
- Useful Software
- Working with Documents

### TIP – How do I see the Page Breaks?

Click Home > Show/Hide button to see paragraph marks and Page Breaks.

## 3. Manage Page Breaks

MS Word will add automatic page breaks to your text in the location where each page finishes.



The placement of these automatic page breaks can be in the middle of a paragraph, after a heading, and even in the middle of a table.

Many people try and control these page breaks by adding extra paragraphs to their text to push the text onto the next page, but this method is not recommended as you have to clean up the excessive space when you add new content to your pages during revisions.

## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
  1. Replace style applied throughout document (Global Replace)
  2. Copying and Pasting
  3. Manage Page Breaks
- Templates and Macros
- Useful Software
- Working with Documents

### TIP – How do I see the Page Breaks?

Click Home > Show/Hide button to see paragraph marks and Page Breaks.

### TIP – Adding Other breaks

Click Page Layout tab > Breaks to see a list of other breaks. Choose Next Page to add a section break.

The recommended ways of managing page breaks is by using:

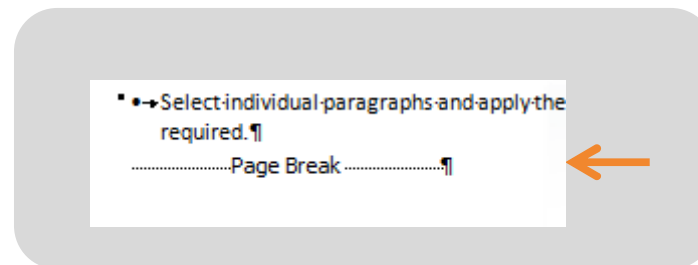
- 'Hard' page breaks, and section breaks at the end of chapters.
- Keep With Next and other paragraph settings.

Using a mixture of Keep With Next and section breaks is the best combination for longer documents.

### 3.1 Add Formal (Hard) page breaks

Create a formal (or Hard) page break :

- Click in an empty paragraph mark (a paragraph without text) where you want the page break to occur and press **Ctrl+Enter**.



In large documents formal page breaks need to be manually changed when you add and remove text. Like empty paragraphs marks, this can be very time consuming.



# MANAGING CONTENT

page 35 / 67

## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
  1. Replace style applied throughout document (Global Replace)
  2. Copying and Pasting
  3. Manage Page Breaks
- Templates and Macros
- Useful Software
- Working with Documents

### TIP – How do I see the Page Breaks?

Click Home > Show/Hide button to see paragraph marks and Page Breaks.

## 3.2 Manage page breaks with Keep With Next

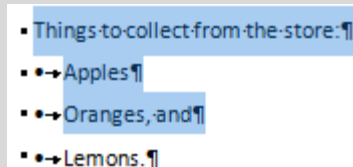
The best method of controlling how page breaks occur is to use **Keep With Next**, and other paragraph settings.

When Keep with Next is applied to a paragraph, such as a Heading, Word will always keep the paragraph with Keep With next applied on the same page as the next paragraph.

### To use Keep With Next:

- Identify two paragraphs that you want to keep on the same as page as a third paragraph.

For example, you might select a paragraph that introduces a bulleted list, and the first bulleted paragraph. Editing rules recommend that it is not advisable to have a single bullet on it's own on a page.



▪ Things to collect from the store:¶  
▪ → Apples¶  
▪ → Oranges, and¶  
▪ → Lemons.¶

# MANAGING CONTENT page 36 / 67

## QUICK START LIST

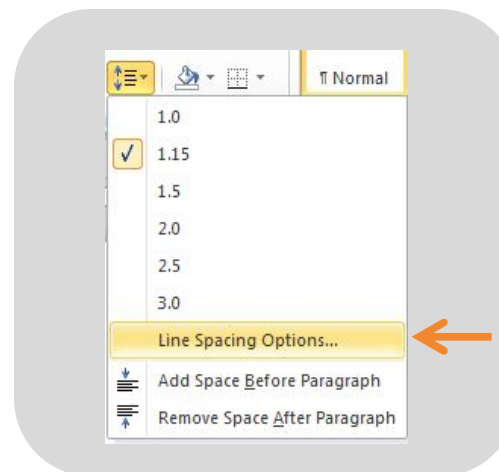
- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
  1. Replace style applied throughout document (Global Replace)
  2. Copying and Pasting
  3. Manage Page Breaks
- Templates and Macros
- Useful Software
- Working with Documents

**TIP – How do I see the Page Breaks?**  
Click Home > Show/Hide button to see paragraph marks and Page Breaks.

As a general guide, select a minimum of two small paragraphs, or a maximum of three single line paragraphs (such as bulleted list paragraphs) that you want to keep on the same page as an additional paragraph.

The last paragraph is not selected.

- Select **Home (tab) > Line and Paragraph Spacing button > Line and Spacing options ...**



The **Paragraph** screen is displayed.

# MANAGING CONTENT

page 37 / 67

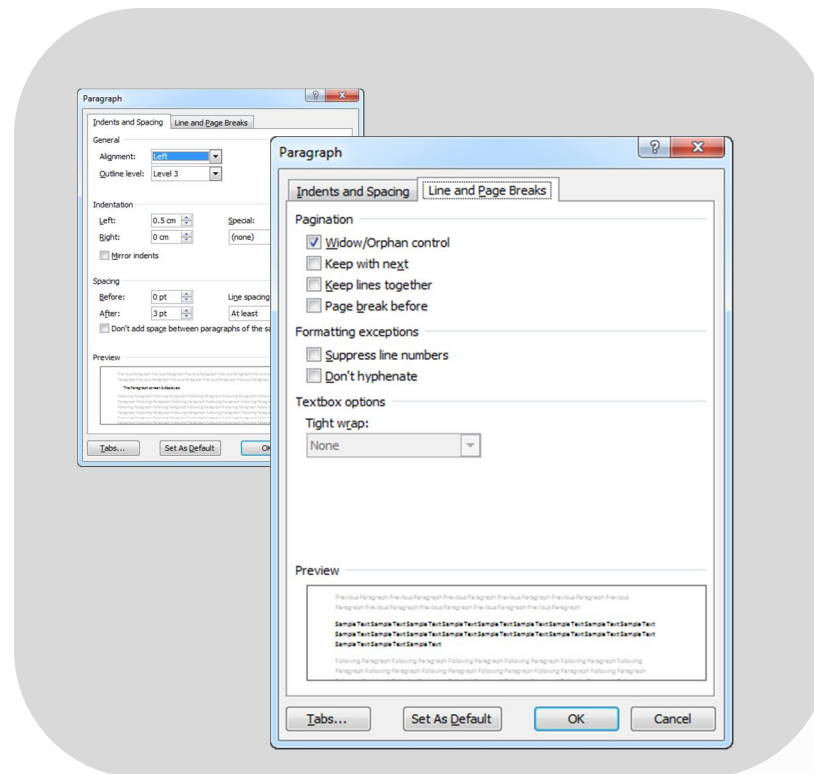
## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
  1. Replace style applied throughout document (Global Replace)
  2. Copying and Pasting
  3. Manage Page Breaks
- Templates and Macros
- Useful Software
- Working with Documents

### TIP – How do I see the Page Breaks?

Click Home > Show/Hide button to see paragraph marks and Page Breaks.

- Click the **Line and Page Breaks** tab





# MANAGING CONTENT

page 38 / 67

## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
  1. Replace style applied throughout document (Global Replace)
  2. Copying and Pasting
  3. Manage Page Breaks
- Templates and Macros
- Useful Software
- Working with Documents

### TIP – Remove Keep With Next

Select the paragraph with Keep with Next, display the Paragraph screen, and untick the Keep With Next option.

- Click the square next to **Keep With Next** until it shows a tick, and click **OK**.

The selected paragraphs will stay on the same page as the next un-selected paragraph.
- Keep With Next, works well with Keep Lines Together and Widow/Orphan Control.

# MANAGING CONTENT

page 39 / 67

## QUICK START LIST

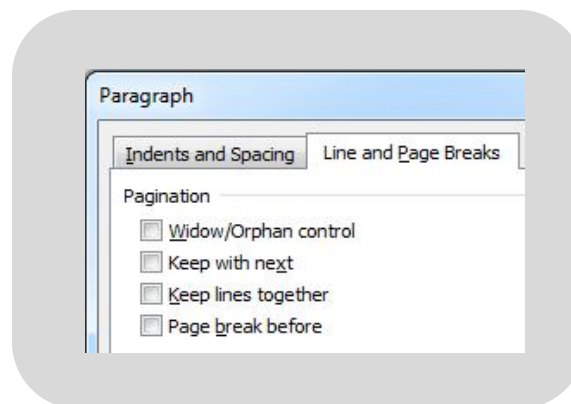
- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
  1. Replace style applied throughout document (Global Replace)
  2. Copying and Pasting
  3. Manage Page Breaks
- Templates and Macros
- Useful Software
- Working with Documents

### TIP – Add Paragraph Settings to Heading Styles

You can prevent headings from being at the bottom of a page, and the next paragraph landing on the next page, by modifying the paragraph settings of your heading styles, and ticking Keep With Next, Keep Lines Together and Widow/Orphan Control.

## 3.3 Other paragraph options

Like Keep With Next, select the paragraph, and select one or more of the other options.



- **Widow/Orphan control**

Stops the first or last line of each of the selected paragraphs from being on one page and the rest of the paragraph on the next page.

- **Keep Lines Together**

Stops an automatic page break from occurring in the middle of a paragraph.

- **Page Break Before**

Adds a page break before the selected paragraph.



## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
- **Templates and Macros**
  1. Create a plain template from an automated template
  2. Record a Macro to apply a Style
  3. Useful Tips
- Useful Software
- Working with Documents

### TIP – Show Symbols

Click the **Home tab > Show/Hide** button so that you can see paragraph marks, page breaks and section breaks when altering templates.

Click **View tab > Gridlines** to see table borders as blue dotted lines.

# TEMPLATES AND MACROS

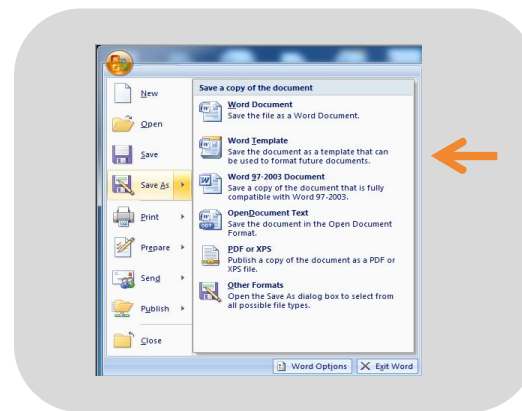
Creating purpose-specific templates and short-cut macros

## 1. Create a plain template from an automated template

### 1.1 Save the template

This process will create a static (not-automated) version of an automated template, that you can adjust to suit your needs.

- Choose a template that is most like the template you want to adapt.
- Run the automated template as you would normally and click **Cancel**.  
This creates a new document based on the template, it will be called **Document #** (where # is a number)
- Select **Word Start > Save As > Word Template**





# TEMPLATES AND MACROS

## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
- Templates and Macros
  1. Create a plain template from an automated template
  2. Record a Macro to apply a Style
  3. Useful Tips
- Useful Software
- Working with Documents

### TIP – How do I see the Page Breaks?

Click Home > Show/Hide button to see paragraph marks and Page Breaks.

- Navigate to the following folder  
**c:\Users\[username]\AppData\Roaming\Microsoft\Templates\**  
 Replace [username] with your logged username. Once you navigate to the Users folder, you will then see your personal username folder in the list.  
 Refer [Templates and Macros](#), [3 Useful Tips](#), [3.1 Show Hidden Folders](#) if you can't see the **AppData** folder.
- Create a new folder in the Templates folder for your personal templates, or a type of template, such as **Sales**, or **Letters**.
- Note – if using the template in conjunction with apps Efficiency, you will need a company folder, and then the category folder, such as **...\Templates\[your company name]\Sales**
- **Select** the new folder
- **Type** the new template name in the **File name** field.  
 For example, **Plain Proposal template**
- Select **Word template (\*.dotx)** from the **Save as type** list  
 “.dotx” (called the file extension) is added to the file name:  
**Plain Proposal template.dotx**

# TEMPLATES AND MACROS

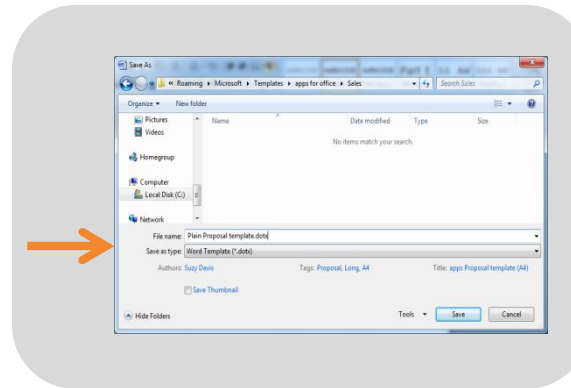
page 42 / 67

## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
- Templates and Macros
  1. Create a plain template from an automated template
  2. Record a Macro to apply a Style
  3. Useful Tips
- Useful Software
- Working with Documents

### TIP – How do I see the Page Breaks?

Click Home > Show/Hide button to see paragraph marks and Page Breaks.



Note, you can't type the file extension, ".dotx", at the end of the file name. Word must add it via your **Save as type** selection. Word will not recognise the template as a template file unless you select the template file type ".dotx" or ".dotm". ".dot" is the pre 2007 template type, and is not used for later versions.

- Click **Save**

# TEMPLATES AND MACROS

## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
- Templates and Macros
  1. Create a plain template from an automated template
  2. Record a Macro to apply a Style
  3. Useful Tips
- Useful Software
- Working with Documents

### TIP – How do I see the Page Breaks?

Click Home > Show/Hide button to see paragraph marks and Page Breaks.

## 1.2 Adjust the pre-defined content

The template you have just created has everything the original template had except for the code. It has styles and building blocks that may have been saved with the template.

Your original template likely had content included which will not be needed for your plain template version.

- The Cover details, if a report template, or addressee section, if a letter, will have fields placed for new content to be added. Leave these.

These fields are called MACROBUTTON fields, and they act as placeholders for information. The author clicks on the field and the field is deleted when the author starts typing.

Refer [Templates and Macros](#), [3 Useful Tips](#), [3.3 Add a MACROBUTTON field](#)

# TEMPLATES AND MACROS

## QUICK START LIST

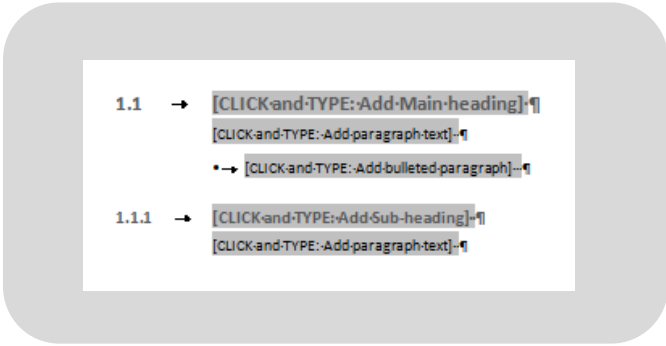
- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
- Templates and Macros
  1. Create a plain template from an automated template
  2. Record a Macro to apply a Style
  3. Useful Tips
- Useful Software
- Working with Documents

### TIP – How do I see the Page Breaks?

Click Home > Show/Hide button to see paragraph marks and Page Breaks.

- Remove any content that was in the original template that is not required for the new template, but leave at least one paragraph mark with the required style applied.

For example, templates will usually require a place where the author adds their content, and this paragraph will have the Body Text style applied, and a MACROBUTTON field to show the author where to type.



1.1 → [CLICK-and-TYPE: Add Main heading]-¶  
 [CLICK-and-TYPE: Add paragraph text]-¶  
 •→ [CLICK-and-TYPE: Add bulleted paragraph]-¶  
 1.1.1 → [CLICK-and-TYPE: Add Sub-heading]-¶  
 [CLICK-and-TYPE: Add paragraph text]-¶

- Save your changes.

# TEMPLATES AND MACROS

## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
- Templates and Macros
  1. Create a plain template from an automated template
  2. Record a Macro to apply a Style
  3. Useful Tips
- Useful Software
- Working with Documents

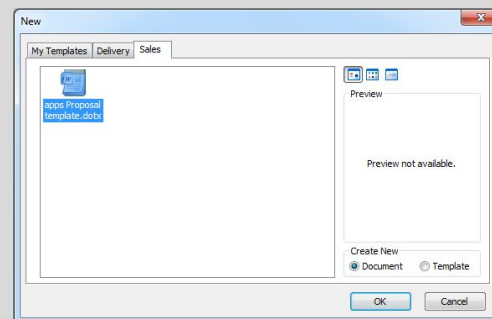
### TIP – How do I see the Page Breaks?

Click Home > Show/Hide button to see paragraph marks and Page Breaks.

## 1.3 Use your template

There are two ways to start a template:

- In **Windows Explorer**
  - Navigate to the folder where the template is stored
  - Double-click on the template file
  - A new document will be created based on the template.
- In **MS Word**
  - Select **Word Start button > New**
  - Select **My Templates**
  - Select the Template folder name, such as Sales



# TEMPLATES AND MACROS

## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
- Templates and Macros
  1. Create a plain template from an automated template
  2. Record a Macro to apply a Style
  3. Useful Tips
- Useful Software
- Working with Documents

### TIP – Create a new template

In the New Templates screen, if you select “Template” instead of “Document” you will create a new template based on the selected template rather than a document.

- Click **OK**  
A new document is created, based on the template.  
Your document is separate from the template, called Document #, and any changes you make in it, will not affect the template.
- Select **File > Save**
- **Navigate** to the folder location you would like to save your document
- **Type** your file name – it will have a .docx extension by default.
- Click **Save**

# TEMPLATES AND MACROS

## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
- Templates and Macros
  1. Create a plain template from an automated template
  2. Record a Macro to apply a Style
  3. Useful Tips
- Useful Software
- Working with Documents

### TIP – How do I see the Page Breaks?

Click Home > Show/Hide button to see paragraph marks and Page Breaks.

## 2. Record a Macro to apply a Style

Macros are a useful way to record selections and actions so that you don't have to repeat all the steps each time. You can just run the macro.

The apps FREE toolbar gives you quick access buttons to Headings, Paragraph Text and the bullet styles (Heading 2, Body Text, and List bullet 1), as well as buttons for Paste Unformatted and Keep With Next.

You likely have some other special styles for the your document that you need on a regular basis, like Question style, for proposals, or Clause styles for legal documents.

These instructions can be used to record other types of macros besides applying a style.

# TEMPLATES AND MACROS page 48 / 67

## QUICK START LIST

- Open a document or template
  - Useful Styles
  - Working with Pictures
  - Managing Content
  - Templates and Macros
    1. Create a plain template from an automated template
    2. Record a Macro to apply a Style
    3. Useful Tips
- 
- Useful Software
  - Working with Documents

### TIP – Display the Style Pane

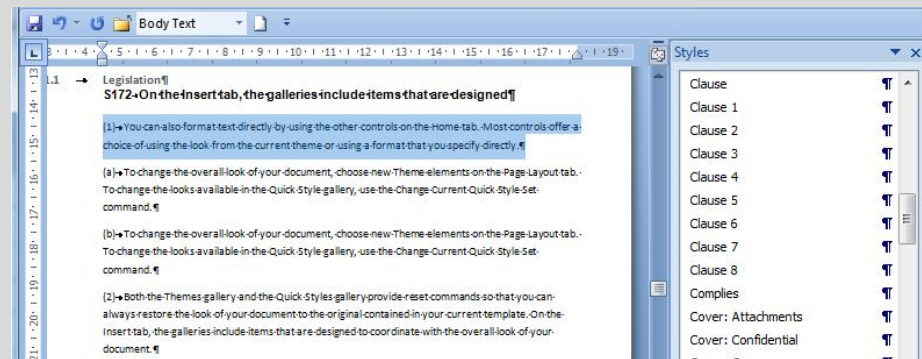
Refer [Useful Styles](#) , 1 Display the Style pane

## 2.1 Prepare for the Macro Recording

The Macro recorder will record everything you do between when you click Start Recording and Stop Recording.

Before you start recording, make sure you have a paragraph ready to select, and the style pane displayed.

In this example, I will document the steps to record how to apply the Clause 2 style to your selected paragraph.





# TEMPLATES AND MACROS

page 49 / 67

## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
- Templates and Macros
  1. Create a plain template from an automated template
  2. Record a Macro to apply a Style
  3. Useful Tips
- Useful Software
- Working with Documents

### TIP – Display the Style Pane

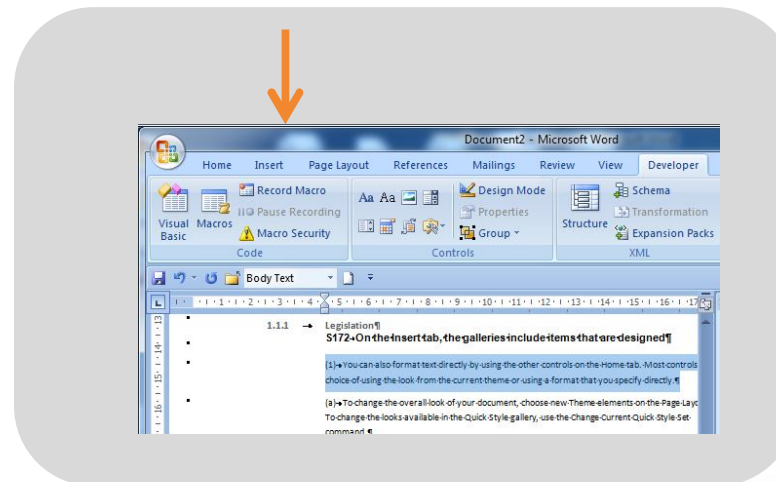
Refer [Useful Styles](#) , 1 Display the Style pane

## 2.2 Record the Macro

- Click on the **Developer** tab

If you cannot see the **Developer** tab, select **Word Start > Word Options > Popular > Show Developer tab in the Ribbon**, click **OK**

- Click the **Record Macro** button



The **Record Macro** screen is displayed

# TEMPLATES AND MACROS

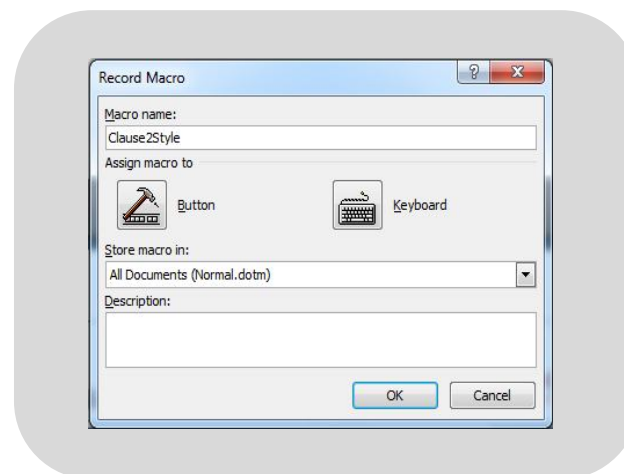
## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
- Templates and Macros
  1. Create a plain template from an automated template
  2. Record a Macro to apply a Style
  3. Useful Tips
- Useful Software
- Working with Documents

### TIP – Store Macros in a addin

A better place than Normal to save your macros is anaddin. An addin is another kind of template that just stored macros.

- Add a name for your macro, without spaces. The name needs to be obvious.



- Click **OK**
- The **Record Macro** button will change to a **Stop Recording** button – indicating that everything mouse click and other movement you make in the document is being recorded in the macro.

# TEMPLATES AND MACROS page 51 / 67

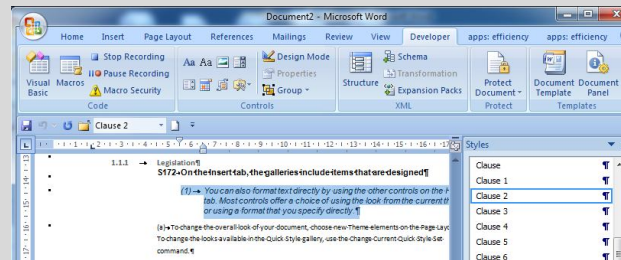
## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
- Templates and Macros
  1. Create a plain template from an automated template
  2. Record a Macro to apply a Style
  3. Useful Tips
- Useful Software
- Working with Documents

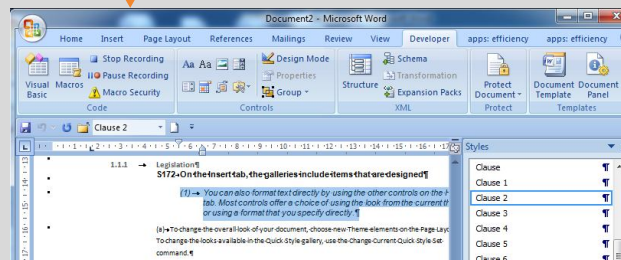
### TIP – Store Macros in a addin

A better place than Normal to save your macros is an addin. An addin is another kind of template that just stored macros.

- Click the **Clause 2** style



- Click the **Stop Recording** button.



# TEMPLATES AND MACROS page 52 / 67

## QUICK START LIST

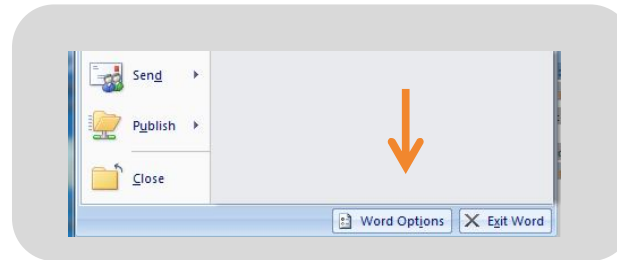
- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
- Templates and Macros
  1. Create a plain template from an automated template
  2. Record a Macro to apply a Style
  3. Useful Tips
- Useful Software
- Working with Documents

### TIP – Store Macros in a addin

A better place than Normal to save your macros is anaddin. An addin is another kind of template that just stored macros.

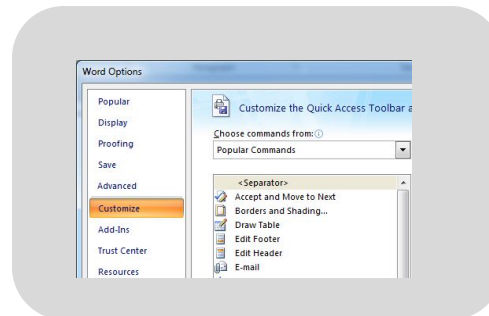
## 2.3 Add Macro to QAT

- Select **Word Options**



The **Word Option** screen is displayed.

- Select **Customize**



# TEMPLATES AND MACROS page 53 / 67

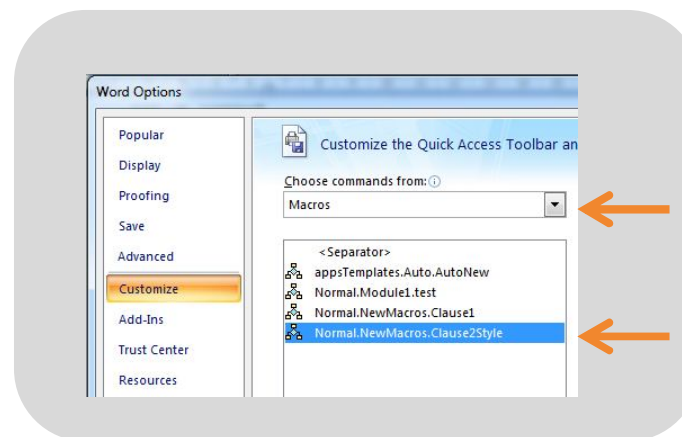
## QUICK START LIST

- Open a document or template
- Useful Styles
- Working with Pictures
- Managing Content
- Templates and Macros
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### TIP – Add a Keyboard shortcut

Click the **Customize** button labelled Keyboard shortcuts to assign a keystroke combination to your macro.

- Select **Macros** from the **Choose commands from** field
- Locate the group of macros that start with “**Normal.NewMacros**”
- Select your macro.



- Click the **Add>>** button  
The selected macro is added to the right panel.

# TEMPLATES AND MACROS

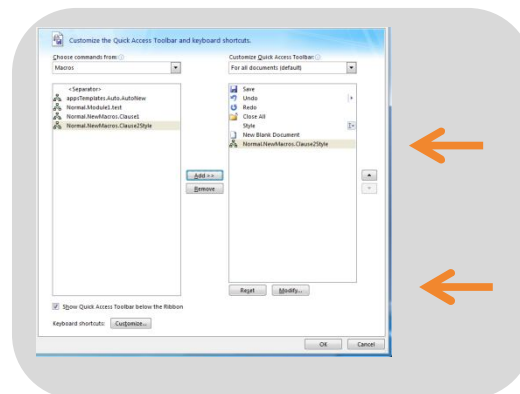
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## QUICK START LIST

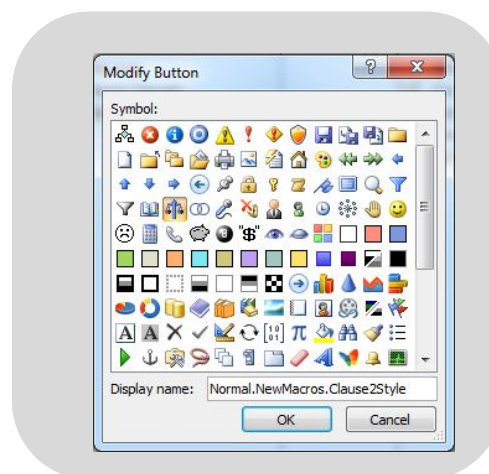
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### TIP – Add a Keyboard shortcut

Click the **Customize** button labelled Keyboard shortcuts to assign a keystroke combination to your macro.



- Click the **Modify...** button at the base of the right hand panel



# TEMPLATES AND MACROS

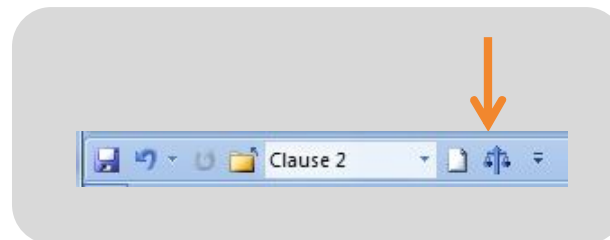
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### TIP – Use Promote/Demote buttons

To apply the Clause 3 style, select the paragraph, click your new button to apply the Clause 2 style, and click the Demote or Promote buttons to change to Clause 1 or 3.

- Choose a picture icon that will help you remember the purpose of the macro.
- Click **OK**, to close the **Modify button** screen.
- Click **OK**, to close the **Customize** screen.



The macro is now visible on the QAT with the icon you chose.

- Select another paragraph that you want to apply the style to, and click the button on the QAT.  
if it doesn't apply the style as if you had selected the style from your style pane, record the macro again, or contact us for assistance.



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## QUICK START LIST

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### TIP – How do I see the Page Breaks?

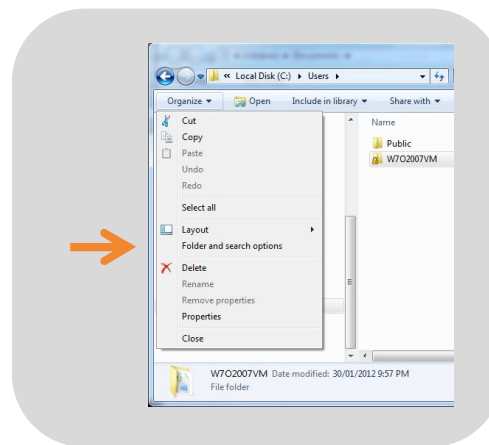
Click Home > Show/Hide button to see paragraph marks and Page Breaks.

## 3. Useful Tips

### 3.1 Show Hidden Folders

If you can't see system folders, like the AppData folder, when you try to save a template to the Templates folder, change your settings in Windows Explorer to make the system folders visible.

- Open **Windows Explorer**
- Select **Organize >Folder and search options**



The **Folder Options** screen is displayed.

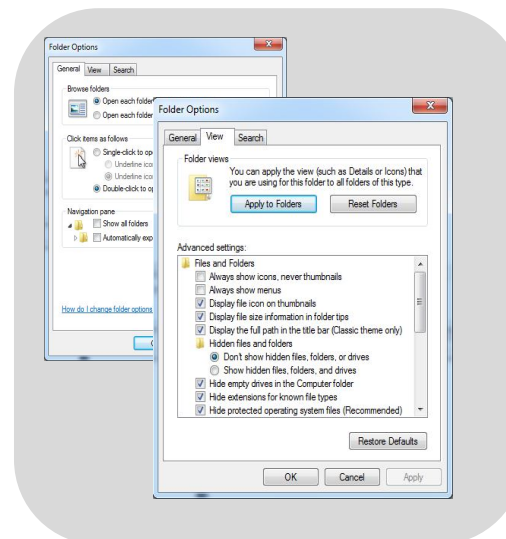


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**TIP – How do I see the Page Breaks?**  
Click Home > Show/Hide button to see paragraph marks and Page Breaks.



- Change only the following options:
  - Click **Show hidden files, folders or drives**
  - Click and deselect:
    - **Hide empty drives in the Computer folder**
    - **Hide extensions for known file types**
    - **Hide protected operating system files (Recommended)**
- Click **Apply**, and then **OK**

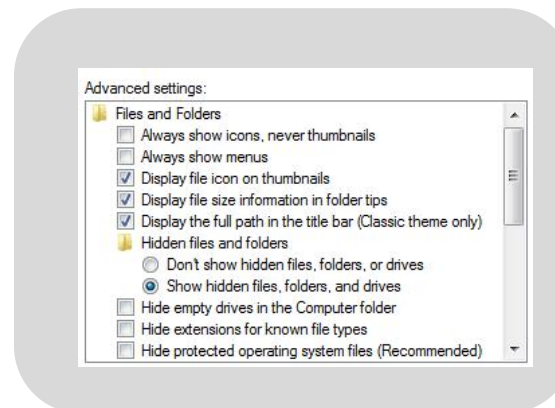
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## QUICK START LIST

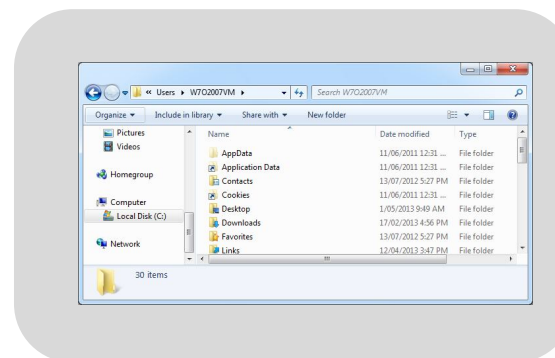
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### TIP – How do I see the Page Breaks?

Click Home > Show/Hide button to see paragraph marks and Page Breaks.



Hidden files and folders are now visible.



To see the **AppData** folder, navigate to **C:\Users\[username]\**

# TEMPLATES AND MACROS

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### TIP – How do I see the Page Breaks?

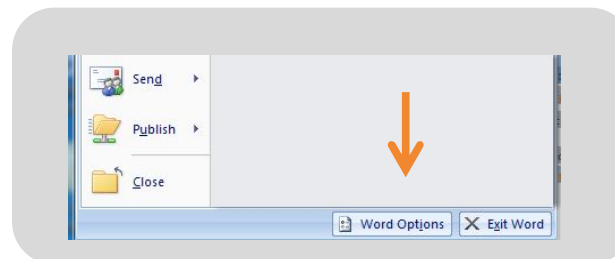
Click Home > Show/Hide button to see paragraph marks and Page Breaks.

## 3.2 Show field shading

To make it easy to see what types of information to add in different places of your template, such as the addressee and address, document title, contact details and so on, you can add fields.

To see the fields, adjust your Word options/settings:

- Select the **Word Start** button (next to the **Home** tab)
- Select **Word Options**



The **Word Option** screen is displayed.

# TEMPLATES AND MACROS

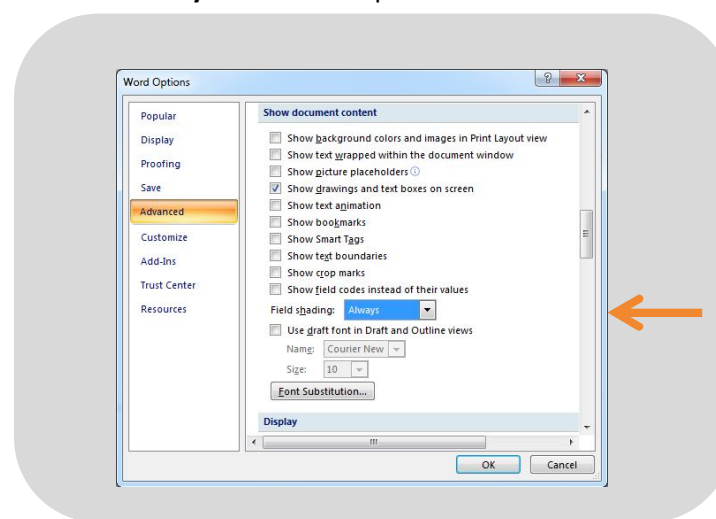
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### TIP – How do I see the Page Breaks?

Click Home > Show/Hide button to see paragraph marks and Page Breaks.

- Select **Advanced**
- Scroll down to the **Show document content** section
- Select **Always** from the drop down list next to **Field shading**



- Click **OK**

# TEMPLATES AND MACROS

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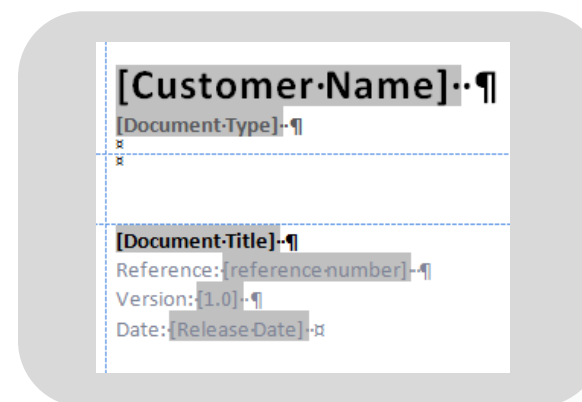
### TIP – How do I see the Page Breaks?

Click Home > Show/Hide button to see paragraph marks and Page Breaks.

### 3.3 Add a MACROBUTTON field

MACROBUTTON fields are used as placeholders in templates to show the document authors where they need to add information into the document, and what type of information they need to add.

MACROBUTTON fields are typically added to the Cover page of report templates and the addressee section of letter templates, as well the signature area, contact details and so on.



Add the MACROBUTTON fields to the areas of your template with the most complex “one-off” formatting requirements.

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### TIP – How do I see the Page Breaks?

Click Home > Show/Hide button to see paragraph marks and Page Breaks.

### Create a **MACROBUTTON** field:

- Click where you would like to add the field.
- Type **Ctrl + F9** to add the field curly brackets { }
- Note, these curly brackets are not the same as typing the curly brackets.
- Click in between the two brackets and type.  
**{ MACROBUTTON NoMacro [LabelName] }**  
LabelName is the short label that is displayed  
For example, [Add Customer Name]
- Select the field, and **right-click**
- Select **Toggle Field Codes**, to convert the field to the field result  
You can right click and select Toggle Field Codes to convert the field back to the field code when you need to check it.
- Right click on the field again and select **Update Field**  
If the document contains paragraphs with one of the three specified headings styles applied, those headings will be listed in the Table of Contents.

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### TIP – How do I see the Page Breaks?

Click Home > Show/Hide button to see paragraph marks and Page Breaks.

### Edit a MACROBUTTON field:

- Select the field, and **right-click**
- Select **Toggle Field Codes**, to convert the field to the field result  
You can right click and select Toggle Field Codes to convert the field back to the field code when you need to check it.
- Click in between the two square brackets and adjust the labelname text.  
{ MACROBUTTON NoMacro [LabelName] }  
For example, { MACROBUTTON NoMacro [Add Customer Name] }
- Right click on the field again and select **Toggle Field Codes**
- Right click on the field again and select **Update Field**, the changed label will be displayed.

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### TIP – How do I see the Page Breaks?

Click Home > Show/Hide button to see paragraph marks and Page Breaks.

## 3.4 Add a Table of Contents

Table of Contents can be created using a TOC field in MS Word.

The TOC field creates a list from paragraphs with nominated styles applied, such as Heading styles, and applies TOC styles.

### Create a TOC field:

- Type **Ctrl + F9** to add the field curly brackets { }
- Note, these curly brackets are not the same as typing the curly brackets.
- Click in between the two brackets and type.  
**{ TOC \t " Heading 1,1, Heading 2,2, Heading 3,3" \h }**
- Select the field, and **right-click**
- Select **Toggle Field Codes**, to convert the field to the field result  
You can right click and select Toggle Field Codes to convert the field back to the field code when you need to check it.
- Right click on the field again and select **Update Field**  
If the document contains paragraphs with one of the three specified headings styles applied, those headings will be listed in the Table of Contents.





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