

Setting Up Word Templates

Before you can 'Print Using Word' it is necessary to have templates set up within Word so that your details can be produced in your desired style and layout. Resource Techniques have supplied a number of templates in the more popular layouts already. However, it is unlikely that these will suit your headed paper, therefore you will either need to create your own templates or edit the existing ones to suit your particular style.

Instructions on how do this follow below. Bear in mind that Particulars templates and Letters templates work in the same way. If you can create/edit one, then you can do the other. It is advised that you have a copy of your existing details\letter layout to hand or a drawing of the new layout you are trying to create for reference purposes.

Note: Resource Techniques do **NOT** offer help or support with Microsoft Word. These notes are for guidance purposes only. If you are not familiar with Microsoft Word feel free to try these procedures or check out 'Help' in Word for more information.

Editing Existing Templates

Word Templates can be accessed from the top line menu:

Click on **Configuration**

Select **Templates**

Click on **MS Word Particulars** or **MS Word Letters** (in these examples we will use Particulars)

The Word Template dialog box opens

By default, the left hand section of this window shows that your templates are kept in the STDPAR folder within TSYS on the hard drive of your computer\server. It is strongly advised that you use this folder for all edited\new templates that you create. The right hand side lists your existing templates.

Click on and highlight the template you wish to edit

Click on the **Edit** button

Your chosen template opens in Microsoft Word

To avoid accidents, click on **File** and **Save As** and give it a different name

Exit the template

Go back in to your newly **Saved As** template

It now doesn't matter if you drop the most enormous of brick because you are working on a copy and not the original template!

Header and Footer, Left and Right Margins

You can change the above like this:

From your open template:

From the top line menu click on **View**

From the drop down menu click on **Header and Footer**

The Header and Footer boxes are displayed and the Header and Footer toolbar appears.

Click on **Page Setup** (6th icon in from the left)

Click on the top left tab headed **Margins**

Change the Top, Bottom, Left and Right margins as desired

If your Header page and second or subsequent pages are the same, click on **OK** to save your changes

If your second or subsequent pages are different click on the **Layout** tab and tick **Different First Page** then click on **OK**

Now Save your changes by clicking on **File** and **Save**

Note: It is important to **Save** your changes regularly. If you do not **Save** changes, when exiting Word Templates you may lose your changes.

Having set the margins, we can now look at the page layout:

Page Layout

There are no limitations to the layouts you can choose. If it can be done in Microsoft Word, you can have it!

It is not essential to use tables for anything other than the front page photographs, however it does make constructing the layout easier and we therefore recommend them for the front page text as well. The following commands can be used on the second or subsequent pages but are more likely to be applicable to the front page.

Tables are accessed the following way:

Place the cursor where you want the table to appear

From the top line menu click on **Insert**

From the drop down menu click on **Table**

Your table now appears in the template. You can resize the table by dragging the icon in the bottom right corner and it can be moved by dragging the icon in the top left corner.

For the table options, right click anywhere inside the table.

You can now insert and resize as few or as many tables as you want to form your page layout.

Note: Any photograph/s you put on the front page **MUST** go in a table as this controls the size of the image/s.

Do not forget to Save your changes

Codes

If you are looking at an existing template you will see that there are a number of code words scattered around it. All of these call in text from Millenium 3 software and most are self explanatory. For instance, Pstreetname will call in the street name, Ptown the town, Pcounty the county and so on.

These codes are accessed from the top line menu:

Place the cursor at the point in the template (within a table, perhaps) where you want your text/photo to go

Click on **Template Fields**

Chose the required option from the drop down menu (eg. If editing particulars choose **Property**, if editing letters choose **Vendor** or **Applicant** etc.)

All of the available codes are displayed

Make your selection by putting a **Tick** in the box to the left of required text (you can make multiple selections)

When you have made your choice/s click on **Accept**

Your selection/s will be entered into your template/table in the required place
Note: If making multiple code choices then they are entered into the template/table in the same place in alphabetical order. This is not always the way you will want them. Sometimes it is easier to make a number of single choices and ensure that the cursor is in the required location within the Template/table each time.

Font Size and Font Type

Variable font sizes and styles are available from the top tool bar. These can of course be used as you see fit. By changing the fontsize and/or fontstyle of a code you automatically make the same change/s to the text that code calls in.

Using the cursor highlight the code you want to make the change/s to
Click on the drop down arrow to the right of the font size/font style you want to change

Click on you chosen font size/style

That's it. Job done.

Do not forget to Save your changes

Colour

As with the font sizes above, any colour available to Microsoft Word is now available for your details:

Using the cursor highlight the code you want to change the colour of

Click on the drop down arrow to the right of the colour icon

Click on you chosen colour

That's all there is to it.

When you are satisfied with the layout of your front page you will need to enter a Page Break to tell the template that you are now ready to go to page 2.

With the cursor at the end of your text/code click on **Insert** from the top line menu

Click on **Break**

Highlight **Page Break** (the top option) if not already highlighted

Click **OK** to confirm

The page break is inserted.

Do not forget to Save your changes

Entering the Property Address at the Top of Page Two and Onwards

To enter the address at the top of second and subsequent pages it is necessary to put the address codes in a Header at the top of page two.

With your template open:

Click on **View**

Click on **Header and Footer**

Scroll down the page to find the second page Header box

Click in this box to get a cursor

Click on **Template Fields**

Either individually or as multiples choose the information you would like to display at the top of the second and subsequent pages and click on **Accept**

Edit the codes as you see fit (bold, italics, fontsize, style, colour etc)

From the Header and Footer toolbar click on the **Page Setup** icon (6th icon in from the left)

Click on the **Layout** tab

Make sure that Under the heading **Headers and Footers** there is a **Tick** besides 'Different first page'

Make sure that under **Preview** and **Apply To:** it reads 'From this point forward'
Click on **OK**

Do not forget to Save your changes

Advanced Options

A number of estate agents now prefer not to use headed paper for particulars and letters but have their computer systems produce these for them as part of the printing process. They literally produce their own headed paper whilst printing letters or details.

This can now be done through the Millennium 3 software using 'Print Using Word'. Before you decide to implement this, bear in mind the quality of your printer. How good a set of details is it capable of printing? How much will you be spending on Ink/Toner etc..

Headers, Footers and Margins

All of the above, in fact just about any graphic you can imagine can be built into a template. Headers, footers and margins are likely to be the most commonly used and this is what we shall deal with here. For further help in this subject see Microsoft Word help notes.

All of the following instructions presuppose that you already have good quality images of your header, footer etc stored on your computer. Experience shows that scanned in images are not likely to be of suitable quality. They really need to be professionally produced.

To insert a Header, Footer or Margin:

Open your template

Click on **View** from the top line menu

Click on **Header and Footer**. The header and Footer boxes appear

If you are working on a header or margin click in the **Header** box to get a cursor

If you are working on a footer click in the **Footer** box to get a cursor

Click on **Insert** from the top line menu

Click on **Picture**

Click on **From File** and go to wherever you have stored your images of your headers, footers etc.

Chose your image and click on **OK**

From the top line menu click on **Format**

Click on **Picture**

Click on **Layout** Tab

Click on the **Behind Text** option

Click on **OK** to accept this option

You can now drag the image to wherever you want it (eg. If a margin, drag it to the relevant side of the page) and resize as required (eg. If a margin, stretch to fit top and bottom and adjust width accordingly)

Note: headers, footers etc. can overlay each other.