

SESSION 5: DOCUMENT TEMPLATE

Relevant Knowledge

Templates or document templates refer to a sample fill-in-the-blank document that can help in saving time. Usually templates are customized documents that may have sample content, themes, etc. For example, if you want to create a resume you can use a resume template and modify only the sections that require changes.

In this exercise, you will learn to work with document templates.

To view sample templates available with your word processor,

1. Go to **File > New**. You will be displayed with different types of templates (Figure below). For example, if you would like to create a letter, you can select the **Letters** option under **Office.com Templates** section.

Suppose you need to create certificates for a recently held competition, you can select the **Certificates** option. You will be displayed with a list of Certificate templates.



Figure 10

Now select any of the templates by double-clicking on it.

A sample certificate window similar to the one below appears. Now you can use this template and customize the contents by replacing the school name, student name, etc.

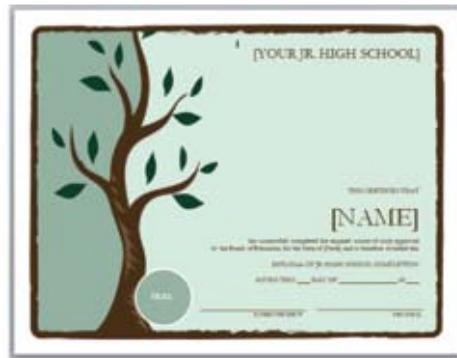


Figure 11

You can also download other types of templates from websites. Some of the websites that offer free templates are:

- office.microsoft.com/templates
- www.thepapermillstore.com
- openoffice.blogs.com/openoffice/templates/
- www.docstoc.com

You can visit the above mentioned websites to search, download and use a template that suits your needs.

Creating a new document based on a template can save you time and effort because all the work it takes to design the document has already been done. You may use the templates that come with word processing software, or downloading templates created by other people, or you can also create and save your own templates for future use. First of all, you need to create a document that will serve as the template.

Note: You create the template as a normal document, but the magic step is where you save it. Click on **File > Save As**, and give the template a name. Select **Word Template** from the **Save as type:** drop down list.

Notice that there is a *Templates* folder within *Microsoft Word*. If you save your template there, then we'll be able to see the template in the My templates category. So select that and click **Save**.

Now to use the template, click on the **File > New**. Go to *My templates*, and as you scroll down, you will find the file {your name}_Invoice , the template you just created. Select that and click **OK**.

Notice that this is a new document and it's not the template. So, we've just created a new document based on one of your own templates. Now when you save this document, it gets saved as a normal .docx file.

EXERCISE

Perform the following activities till you are confident:

S.No.	Activities
1.	Download and use templates from the Internet
2.	You will now create a template of an invoice. An invoice is just the kind of document that needs to have a set format and one that will be created over and over again. Save the file with the name – {your name}_Invoice.

Hint on how to create an invoice: You can divide the invoice into 3 main parts: The Header, Body and Footer.

The **invoice header** may contain **Your letterhead** : (Your business name, address, telephone & email and web address if available); the word “Invoice” or “Bill” clearly written towards the top of the page; an **invoice number** (this a running serial number that you maintain and should be unique for every invoice); an **invoice date**; **Your payment terms** or how soon you expect to be paid e.g. “COD”, “Cash”, “30 days” etc.; your customer or **client name and address**; **“Our Ref#”** or “Our Reference” (here you can enter your quotation number if you issued a quotation prior to the invoice) ; **“Your Ref#”** or “Customer Ref” (if you were given a Purchase order or Work Order by your customer, here you should enter the PO or WO number so the customer can match your invoice with their own paper work).

The invoice body could have a **description of the goods** you are supplying, quantity, unit of measure, price per unit and total amount for individual items. In the case of services, **your brief scope of work** and amount for individual items. You may specify information in a tabular form. You are creating a template, so you need to just create the skeleton, the details will be filled in when you use the template and make multiple invoices. The **invoice footer** could have a **Total Amount** of all individual items; **Payment instructions** (only if necessary! This tells recipients how to make their cheque payment, whom to address it to etc. If you expect payments by bank transfer, you should provide your bank account number and details here.); **Other comments** (delivery instructions, goods return policy, overdue payment policy etc).

ASSESSMENT

Fill in the blanks:

1. Templates or document templates refer to a _____ document.
2. Creating a new document based on a _____ can save you _____ because _____.