

## SETTING UP YOUR OWN WORD TEMPLATES

GEM uses Microsoft Word (or whatever other application your system uses for editing .rtf files), for all its word processing. This means you do NOT need to get used to a completely new Word Processor to use all of GEM's advanced features.

GEM also uses Templates to send fully formatted E-mails, Faxes and Letters. Unfortunately it is impractical for us to supply Templates for every Word Processor, so we only supply them for Microsoft WORD.

When sending individual E-mails, Faxes or Letters, GEM actually takes over a copy of MS WORD and addresses and signs your chosen template. For all other Word Processors you have to use Mail-Merge to send even single E-mails, Faxes or Letters. So you only get the full benefit of GEM if you use MS Word.

### Prerequisites

If you propose to update someone's Categories whenever you send a copy of a particular E-mail, Fax or Letter, so that you can track which items or correspondence they have received, as part of a 'Sales Pipeline', or other process or procedure, then you should read 'GEM – Creating your own Categories' first.

### Initial Set-Up Requirements

When GEM is installed it comes with default WORD Templates - **E-mail.dot**, **Fax.dot**, **Letter.dot** and **Labels.dot**. However the ones in the current version of GEM are NOT the ones used in this Module, which has been written for the next release. Nor are they in the correct location. So we have some preliminary set-up to do – just to make sure the rest of the exercises in this module work correctly.

When you received this module you should also have received the above WORD Templates as attachments. Save them into: **C:\Users\Public\GEM\Templates** which is where they will be installed in future. (Vista and Windows 7 mean that Templates now cannot be stored in C:\Program Files.)

Now we need to tell GEM where they are. So go into GEM and use **Setup, WORD Templates** on the Menu Bar. This will display the **SETUP – WORD Templates** Form.

Select:

**E-mail**

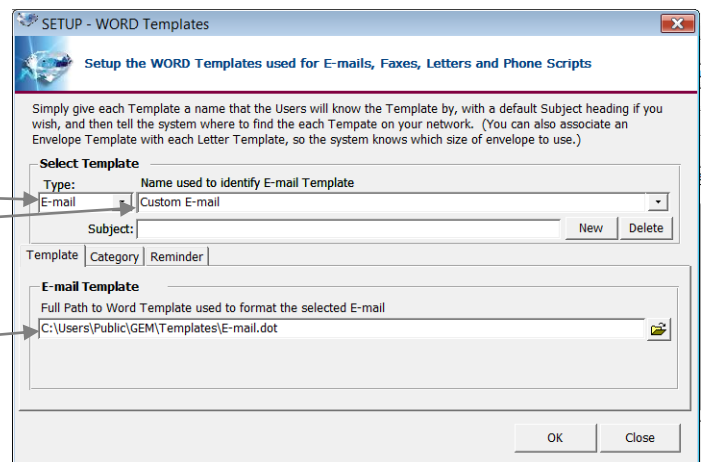
**Custom E-mail**

and defined E-mail Template as:

**C:\Users\Public\GEM\Templates\E-mail.dot**

Repeat the same for:

**Custom Fax and Custom Letter**



## Customising the Standard Templates

Modifying **E-mail.dot**, **Fax.dot**, **Letter.dot** and **Labels.dot** is the easiest way to create your own Templates. So let's look at them in turn - starting with **C:\Users\Public\GEM\Templates\E-mail.dot**

Remember don't double-click the Template to open it, or it will copy the Template and open the copy as **Document 1**, or something similar. You should always right-click a Template and **Open** it, if you want to edit the Template itself. This will give you a copy of our own E-mail Template that you can customise to produce your own:

At the top there are three fields that start with "Add your own...". You should add your own **Logo**, **Address** and **Phone & Fax Nos** where indicated. You can of course change the complete layouts, fonts and colours as you like.

There is one mail-merge field indicated by chevrons at each end <<Addressee>>. Leave this alone! It will be substituted for you with the name of the person the E-mail is addressed to by GEM for single E-mails, and by MS WORD during mail-merges.

There are also a bunch of fields in square brackets, beginning with "[Click here to add...". These too should be left alone they will always be substituted for you by GEM. (These are actually WORD 'Macrobuttons'.)

In the middle there is some **Explanatory Text**. To make it easier to read it is reproduced below:

The screenshot shows a Word template with several fields for customization:

- Add your own Logo here** (with a black box placeholder)
- [Click here to add - Subject]**
- [Add your own Address here]** and **[Add your own Phone & Fax Nos here]**
- [Click here to add - Salutation] «Addressee»**
- [Click here to add - Body of E-mail]**
- Explanatory Text** (a text box containing instructions and a bulleted list of actions to take)
- [Click here to add - Yours]**
- [Click here to add - Signature]**
- [Click here to add - Author's Name]**
- [Click here to add - Job Title]**
- [Click here to add - Catch Phrase]**
- Dispatched by 'GEM Networking' from [www.GEMnetworking.com](http://www.GEMnetworking.com)**

### Explanatory Text

Because GEM uses fully formatted Emails, Faxes and Letters, it uses Templates to specify their formatting and layout. GEM comes with standard Microsoft Word Templates specified in **C:\Users\Public\GEM\Templates**. They should be edited to suit your requirements before using the system to send emails, faxes or letters.

You should edit them and then save them in a location where all your users have access to it. Full instructions can be found in the GEM User Manual in **APPENDIX C - Creating Your Own Word Templates**, should you need them. The GEM User Manual is accessible through the Windows Start Menu. However, in outline, all you need to do is:

- Add your own **Logo, Address, Phone & Fax Nos** above.
- For Custom E-mail, Fax or Letter Templates leave the **[Click here to add -Body of E-mail]** in the Template above - so that it can be replaced every time you send a non-standard E-mail, Fax or Letter. For standard E-mail, Fax or Letter Templates replace it with whatever standard 'boiler plate' text you require.
- **Delete this Explanatory Text.**
- **Save your document as a Template** in a Folder on your Network where all users will have access to them.
- Let GEM know where the Templates are using **SETUP, WORD Templates** - again for details see the GEM User Manual, if necessary.

This is designed to tell new Users how to set up their own templates as briefly as possible – even if they can't be bothered to read either this module, the User Manual or on-line HELP.

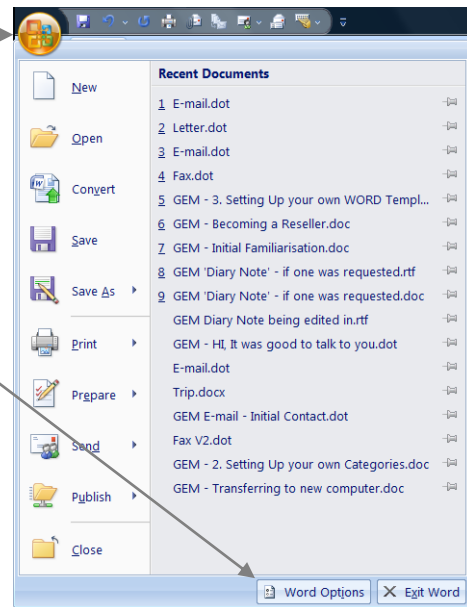
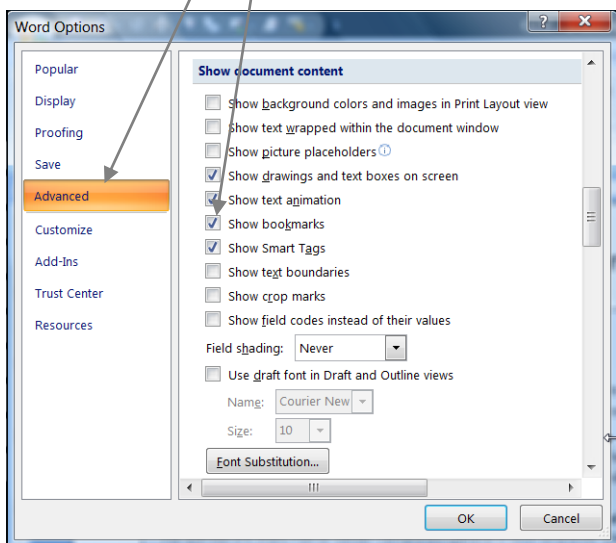
At the bottom of the WORD Template there is a brief reference as to how the E-mail was dispatched. We would of course love you leave it there as it contains a hyperlink to our Website. (If you join our

‘Resellers Scheme’ we will tell you how you can modify this hyperlink so that you would get paid commission on any sales that result from people following this link to our website.)

So all you need to do is follow the instructions in the Explanatory Text and you’re good to go.

You may have noticed there are also a couple of grey ‘I-beams’ showing. These are WORD Bookmarks that define the area of text that will be returned to the GEM database when you’ve finished editing it in word. If they are not visible in your copy of WORD 2007, we suggest you:

- Click the **Office 2007 Button**
- Click the **Word Options Button**.
- Select **Advanced**.
- Ensure **Show Bookmarks** is ticked.



For other versions of WORD look up ‘Show Bookmarks’ in WORD Help.

Now edit **C:\Users\Public\GEM\Templates\Fax.dot** This looks somewhat different:

You’ll notice that it deliberately does NOT include graphics. This is because even WORD 2007 is not very good at sending faxes as it completely stuffs up any graphics. So we have used only those formatting tricks that you CAN get away with.

Once again just follow the instructions in the **Explanatory Text** and you’re good to go.

# YOUR name

# Fax

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[Add your own Address here]
[Add your own Phone and Fax Nos here]

**To:** «Addressee\_Formal»  
**of:** «Company»  
 «Fax\_Number»  
**Date:** Friday, 14 July 2006  
**Subject:** [Click here to add - Subject]  
**From:** [Click here to add - Author's Name]  
 [Add your own Fax No here]

**No of Pages:** 1 (Including this one)

If this Fax is not intended for you, would you please send a copy of the Fax back to us, suitably annotated (so that we know it went astray), and immediately destroy your copy. You are legally obligated not to use or disseminate any information it contains.

[Click here to add - Body of Fax]

**Explanatory Text**

Because GEM uses fully formatted Emails, Faxes and Letters, it uses Templates to specify their formatting and layout. GEM comes with standard Microsoft Word Templates specified in C:\Users\Public\GEM\Templates. They should be edited to suit your requirements before using the system to send emails, faxes or letters.

You should edit them and then save them in a location where all your users have access to it. Full instructions can be found in the GEM User Manual in APPENDIX C - Creating Your Own Word Templates, should you need them. The GEM User Manual is accessible through the Windows Start Menu. However, in outline, all you need to do is:

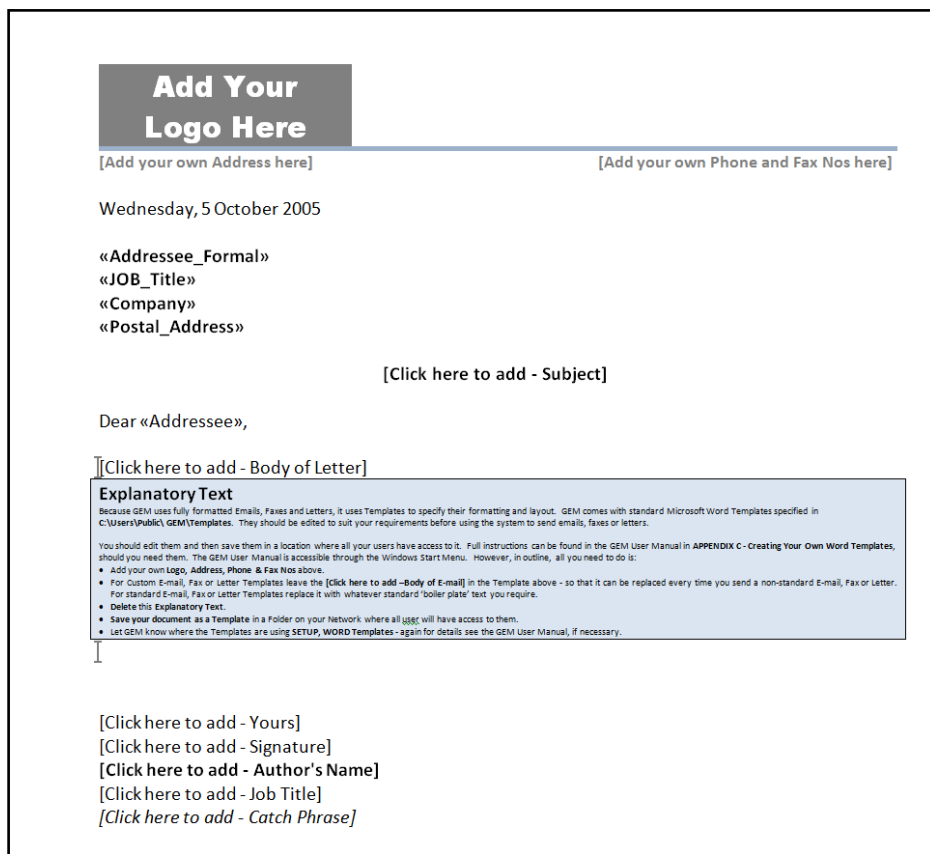
- Add your own tags, Address, Phone & Fax Nos above.
- For Custom E-mail, Fax or Letter Templates leave the [Click here to add -Body of Fax] in the Template above - so that it can be replaced every time you send a non-standard E-mail, Fax or letter. For standard E-mail, Fax or Letter Templates replace it with whatever standard 'boiler plate' text you require.
- Delete this Explanatory Text.
- Save your document as a Template in a folder on your Network where all users will have access to them.
- Let GEM know where the Templates are using SETUP\_WORD Templates - again for details see the GEM User Manual, if necessary.

[Click here to add - Yours]  
 [Click here to add - Signature]  
**[Click here to add - Author's Name]**  
 [Click here to add - Job Title]  
 [Click here to add - Catch Phrase]

Dispatched by 'GEM Networking' from GEMnetworking.com

Now edit **C:\Users\Public\GEM\Templates\Letter.dot**

Again just follow the instructions in the **Explanatory Text** and you're done.



## Creating Standard Templates

The easiest way of creating a Standard Template with 'Boiler Plate' Text doing this is to take a copy of one of your Custom Templates and replace the`

**[Click here to add – Body of E-mail]**

• **[Click here to add – Body of Fax]** or

• **[Click here to add – Body of Letter]**.

with whatever you like in MS WORD. Then Save As a new WORD Template with whatever name you like. You don't have to confine yourself to plain text you can use 'Conditional Text', 'Mail-Merge Fields', 'Auto Text' or any of WORD's other advanced features.

### Exercise – Creating a Standard Template

Open **c:\Users\Public\GEM\Templates\E-mail.dot** (Remember to right-click it then chose **Open**.)

Immediately save it as Template in the same folder with the name

**'Thank you for your enquiry E-mail.dot'**.

(This is just a safety precaution. It saves you from accidentally overwriting the original template.)

Then click on **[Click here to add – Body of E-mail]** and change it to read:

"Thank you for your Enquiry..." You can add whatever you like – but stay on subject.

Close and re-save the Template - that's it.

# SETUP - WORD Templates

Once you have created a WORD Template you still need to tell GEM where it is. This is done using the **Setup, WORD Templates** Option on the GEM Menu Bar. It displays the **SETUP – WORD Templates** Form.

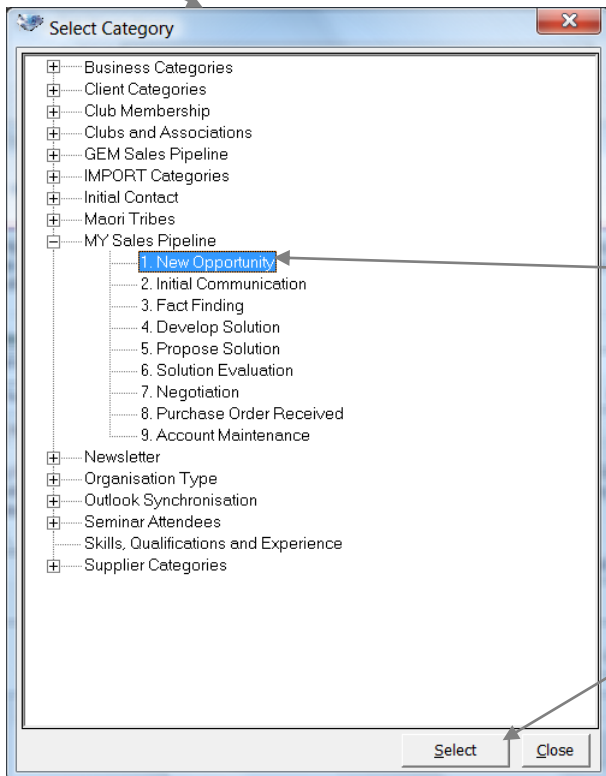
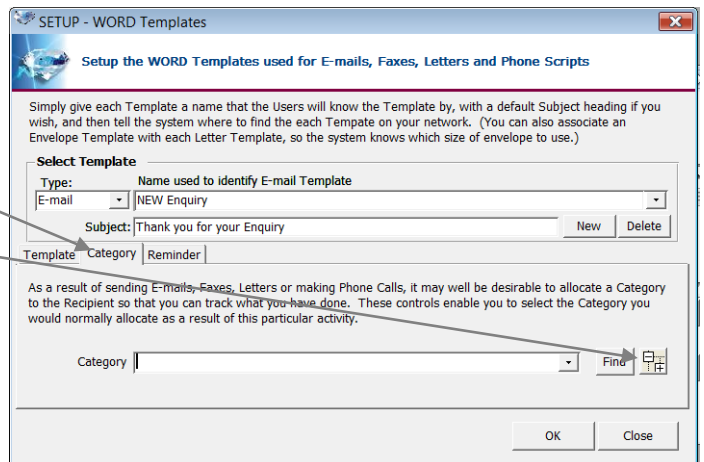
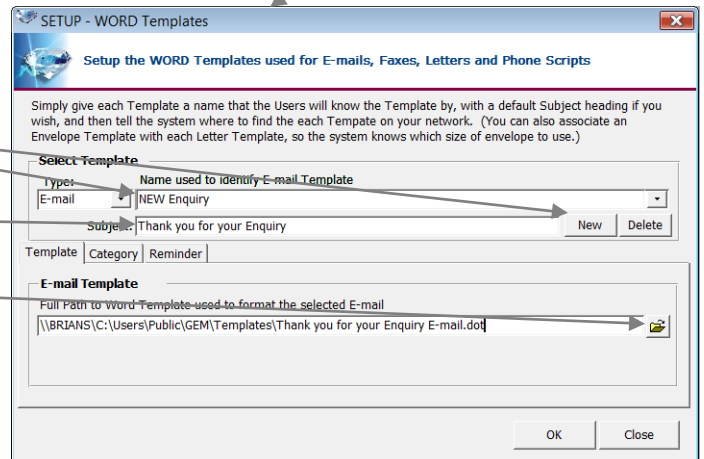
Click **New** Button to setup a NEW Template.

Add a **Name used to identify E-mail Template** and a **Subject** to appear on the E-mails.

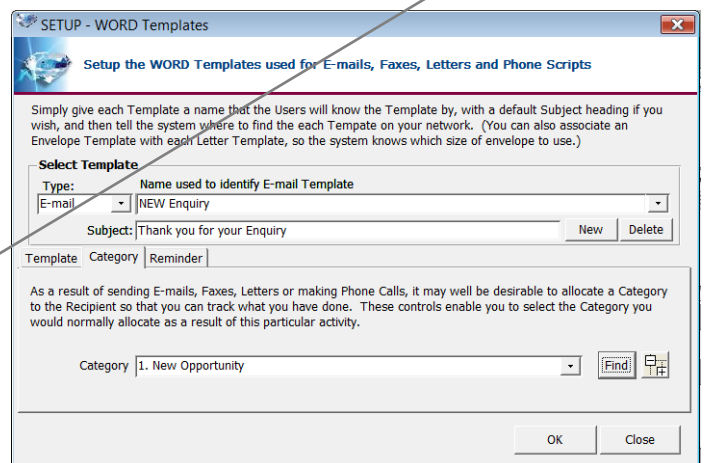
Use the **Browse** Button to navigate to the Folder and find the E-mail Template.

Use the **Category** Tab, if you want to allocate a Category to the recipients of the email so you can track what you have done.

Click the **Tree-View** Button to display the **Select Category** Form.



Select the appropriate **Category** and click the **Select** Button. This will add the selected category to the Form.



If you want to automatically set a Reminder use the **Reminder** Tab.

Just select when you want to set the Reminder for.

Click **OK** to save and close the Form.

### Exercise – Setup a WORD Template

Use the above illustrations to setup the WORD Template you created in the last exercise so it can be used by GEM.

