

How to save a template in Microsoft Office

When you open a template in Microsoft Word, a copy of the template is opened with a new file name so that the template file itself remains unchanged. That way, you can reuse the template whenever you need it. When you save a document as a template from Word, your document is saved with the entire contents intact as a Microsoft Word template.

A template includes everything, such as the document's words, formatting, objects, pictures, graphs, charts, and content. Typically, people save a document that has room for additional content, such as a business letterhead or a form, as a template.

Quick Tip

The letter *t* in the file extensions .dotx, .xltx, and .potx alerts you that you're creating a template. Of course, PowerPoint's regular file format .pptx also has a *t* in the second to last position, but that's an exception!

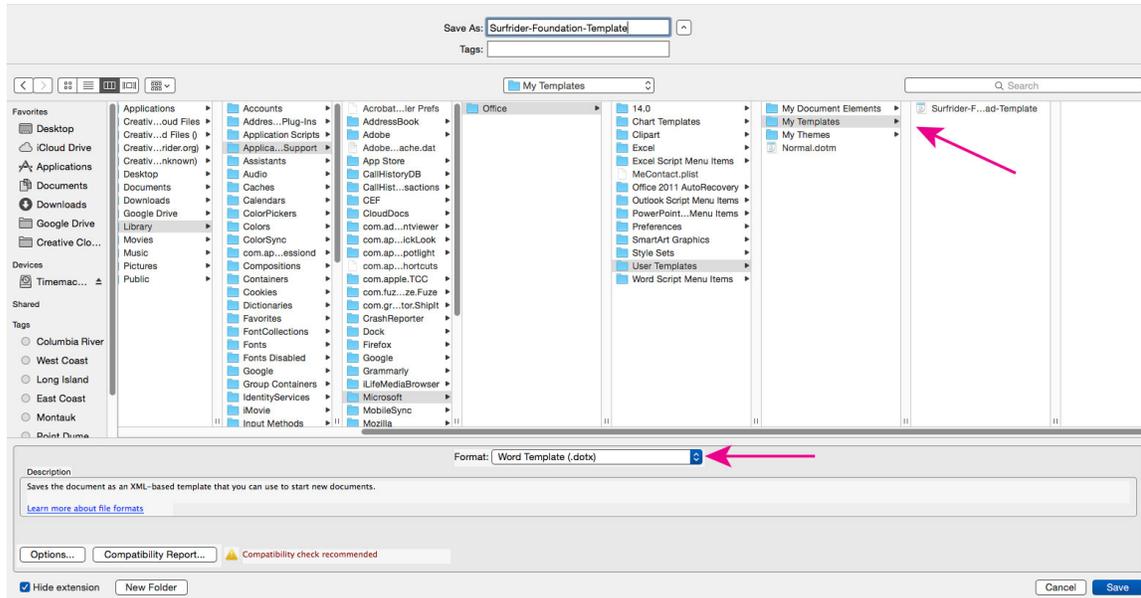
Important Note: Please install the font families prior to installing and opening the Surfrider Foundation Word template. The template will be broken if you skip this step. The font families are enclosed in the folder labeled **Fonts** in the main letterhead folder. Install Roboto and Bebas Neue.

You can easily save a Word document in the **My Templates** folder for future use. Below is a step-by-step procedure to follow:

1. Open the supplied Surfrider-Foundation_Letterhead-Template.dotx file.

2. Choose File → Save As.

The **Save As** dialog appears in the image below. Click the **Format** drop down window and choose Word Template (.dotx)



3. Type a filename for your template in the Save As text box.

4. In the Format drop-down list, choose the Word Template (.dotx) and then click the Save button.

Quick Tip

To make it easy for you, when you choose a template format, Microsoft Word automatically saves your template in the My Templates folder by default, which is convenient for most users. You should then be able to select that custom template for future use.

To create a new document using the newly installed Surfrider Foundation template, click **File** → **New From Template**. In the side window, choose **My Templates**. You should now be able to see and select the Surfrider Foundation template.

The header and footer are locked items. Custom styles for preformatted text are programmed into the **Styles** section under the **Home** tab for selecting desired text and then clicking the corresponding button to automatically format the text. This will keep our documents looking consistent. Just replace the sample content and save your new document as a .doc file and not a .dotx file.

Changing Header and Footer Content

Chapters may want to swap out the header logo and footer contact info. When you change this info, please keep the format and the look the same. The information should be clean and simple. The logo looks best when you use the blue horizontal logo in the JPG format, which can be found on ChapterNet. Scale the logo to approximately the same size as the original Surfrider Foundation logo or very close to it. After these changes are finalized, you will need to follow the directions above to save this new chapter specific template.