

- 4) On the Menu bar, choose **File > Templates > Save as Template**. The Save as Template dialog (Figure 226) opens, displaying the existing categories and a box for the name for the new template.
- 5) Select a category, for example *My Templates* or *Business Correspondence*. You can also set this template as a default template at this time. Click **Save**.

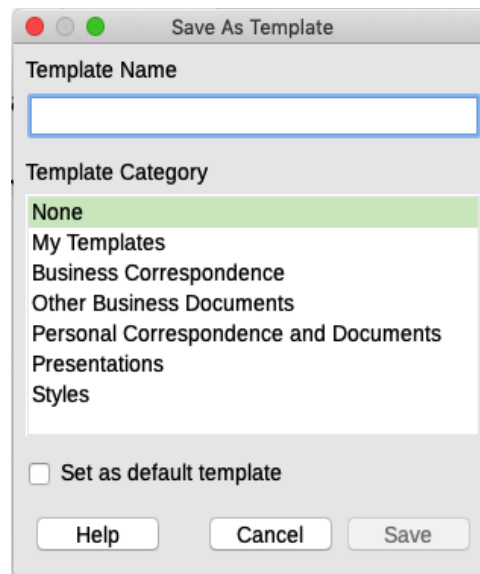


Figure 226: Save as Template dialog

## Creating a template using a wizard

You can use wizards to create templates for letters, faxes, and agendas. To create a template using a wizard:

- 1) On the Menu bar, choose **File > Wizards > [type of template required]** (Figure 227).

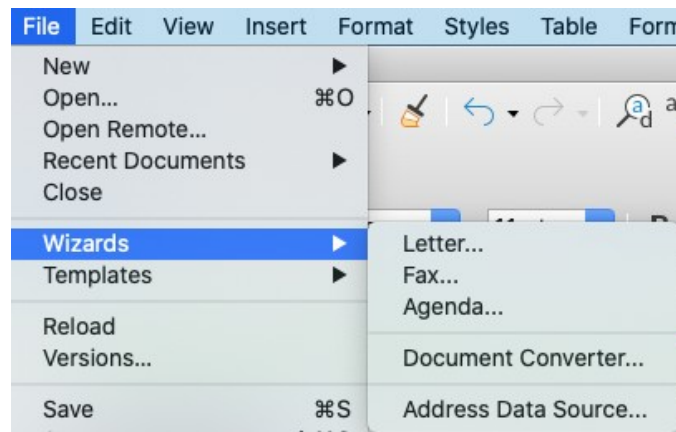


Figure 227: Choosing a template wizard

- 2) Follow the instructions on the pages of the wizard. This process is slightly different for each type of template, but the format is similar.
- 3) In the last section of the wizard, you can specify the template name that will show in the Templates dialog and the file name and location for saving the template. The two names can be different but this may cause confusion. The default location is your user templates folder but you can choose a different location.
- 4) To set the file name or change the folder, click the **Path** icon (the three dots to the right of the location). On the Save As dialog, make your selections and click **Save** to return to the wizard.