

**E-mail Stationery from StationeryCentral.com, Inc.**

<http://www.stationerycentral.com>

**Microsoft Outlook Installation & Use Instructions**

**PRINT THESE INSTRUCTIONS BEFORE PROCEEDING**

[Note: these instructions may seem long, they are actually just very detailed to make your job easy. This whole process should take no more than ten minutes.]

Please read the "tips on using your new stationery" starting on page 8 of this document - it is important.

**Contents:**

Page 2 – Three Important Preliminary Steps

Page 3 - Creating your "signature block" and saving your file

Page 4 - Configuring Outlook to use your Stationery for New Messages

Page 5 - Configuring Outlook to use your Stationery for Replies to Messages

Page 8 - Tips on using your new stationery and answers questions you may have

## Section 1 – Three Important Preliminary Steps

### 1. Before Beginning - Determine what version of Outlook you are using

These instructions are written for Outlook 2000, Outlook 2002, and Outlook 2003. There are just very minor differences between these three versions in terms of how this set-up will go, but **you need to know what version of Outlook you are using**. If you don't know – from your inbox click HELP on the top menu bar and pull down to ABOUT MICROSOFT OFFICE OUTLOOK – the first or second line will show you what version you're using.

### 2. Turning Microsoft Word off as your default editor

Using Microsoft Word as your default email editor (instead of the editor built into Outlook) inflates the size of an average two paragraph email message by 300% or so. It does this by adding a massive amount of hidden formatting code that is counter productive in the email environment, and especially damaging to the formatting of your email stationery.

The only reason we've ever discovered that people like to use Word is that they like its spell checking. **Section 5 of this document explains how to set up spell checking in Outlook without using Word.**

To turn Word off, or just to check and see if you even have it turned on, take these following five steps:

1. From your inbox click TOOLS at the top.
2. Pull down to OPTIONS.
3. Click the MAIL FORMAT tab.
4. Make sure the box (near the top) that says "Use Microsoft Word as my default email editor" is UNCHECKED (if it's checked, uncheck it now).
5. Click OK at the bottom of the options screen to save any changes you made and exit the options screen.

### 3. Make sure you have other email signatures / stationery disabled before proceeding

Any other (old) email signatures or stationery that you have turned on by default will cause the installation to get goofed up. To deactivate any other stationery or signatures do the following:

1. From your inbox click TOOLS at the top.
2. Pull down to OPTIONS.
3. Click the MAIL FORMAT tab.
4. Make sure the pull-down (in the middle) that says "**Use this stationery by default:**" is set to <NONE> - if it isn't change it to <NONE> which is found at the top of the list.
5. Make sure the pull-down (at the bottom) that says "**Signature for new messages:**" is set to <NONE> - if it isn't change it to <NONE> which is found at the top of the list.
6. Click OK at the bottom of the options screen to save any changes you made and exit the options screen.

## Section 2 - Creating your "signature block" and saving your file

**Overview:** Your email stationery has been designed to allow you to enter a "signature block" of your choosing. Signature blocks generally consist of a complementary closing (Sincerely, Best regards, etc.), your name and your title. In some cases you may find it beneficial to add other contact information such as your direct dial phone number, your cell phone number or your email address. Following are the steps you will need to follow to create your signature block and then to save your email stationery template with the changes you've just applied. (Note: If you wish to change your signature block at a later date you will be able to do so simply by working through these set-up instructions again, beginning at this point.)

1. If you do not know what font style and size you use for composing your email messages, open a new message in Outlook, begin typing something, and look at your top formatting menu to see what font style and size is being used. Write this down or remember it. Close this message.
2. Click the link that was provided to you (either by email or on a web page) – link concludes with **.oft**
3. If prompted by a Windows "File Download" dialog box, click OPEN.
4. A new email message will open in Outlook.
5. DO NOT enter a subject line, a TO address, or type any text in the body of the email.
6. You will see a prompt to enter your signature block that will appear roughly as follows:

Enter your signature here (multiple lines are okay)

Highlight this text. Be careful to make sure that only the text itself is highlighted - no spaces before the "E" or after the closing parenthesis should be highlighted.

7. Type in your preferred signature block. For example:

Sincerely,

John Doe  
Vice President of Sales  
Direct: (414) 473-6812  
Mobile: (414) 988-4421  
[john.doe@acme.com](mailto:john.doe@acme.com)

**Note #1:** If you elect to enter your email address or your website address, these links will be live only if you see them change color. Pressing your ENTER key will cause them to change color, but it will also place a space beneath them. If your desired live link is at the end of your signature block, such as the email address is in the above example, a method of making the link live without adding an extra space beneath it is to press your UP ARROW key – you'll see that doing this will make the link live.

**Note #2:** If you ordered stationery with your handwritten signature included, you will need to highlight two different prompts in order to personalize your signature block above and below your signed name. This will look roughly as follows:

Enter your complementary closing here

*John Doe*

Enter the rest of your signature here (multiple lines are okay)

8. After typing your closing block the way you want it - highlight it and adjust the font style and size (if necessary) to match the font style determined in step 1.

9. Once everything is set just the way you want it, click FILE in the upper left corner of your window and select SAVE AS from the drop-down menu.
10. A windows dialog box will appear. At the bottom of this dialog box you will see an option labeled "Save as Type:" - this must be set to **HTML (\*.htm;\*.html)** or **Web Page (\*.htm;\*.html)** - if it isn't set that way use the little downward pointing triangle at the right of this text box to change this setting.
11. Now look at the top of this Windows dialog box to where it says "Save In:" - you will need to make a number of clicks here to change this to the correct folder.
12. First pull-down to C: or Local Disk C: or something with a name like that.
13. Next, in the middle window, double click the folder called PROGRAM FILES
14. Next, in the middle window, double click the folder called COMMON FILES
15. Next, in the middle window, double click the folder called MICROSOFT SHARED
16. Next, in the middle window, double click the folder called STATIONERY
17. Finally, back to the bottom of the windows dialog box where it says "File Name:" type in a short name that ends with the characters .HTML (that is "period" HTML). For example, your filename might be:  
  
**new-stationery.html**
18. Click the SAVE button in the lower right corner of the dialog box (if you see a Microsoft Office Word dialog box telling you that you are going to "remove Office specific tags" go ahead and click YES).
19. Send the message that you have been working on to yourself (this will avoid leaving you stuck with an unaddressed message in your outbox that you will need to delete).

### **Section 3 - Configuring Outlook to use your stationery for new messages (two options are available - please decide first which one best suits you)**

#### **Option A - Making the stationery appear automatically for every new message**

1. From your inbox, click TOOLS on the top menu and pull down to OPTIONS
2. Click the MAIL FORMAT tab
3. In the middle of the dialog box you'll see a section labeled "Stationery and Fonts" - where it says "Use this stationery by default" pull down to the file name that you saved in step 17 above.
4. Click APPLY and then OK at the bottom to close the dialog box. Click create mail and your stationery should appear. Note: You will have to "click into" the typing space before composing a message. Just pressing the TAB key will not position your cursor correctly. See the notes at the end of these instructions for further information.

#### **Option B - Using your stationery selectively for new messages**

1. From your inbox, click ACTIONS on the top tool bar and pull down to NEW MAIL MESSAGE USING.
2. If you don't see the name of the file that you save in step 17 above, click the MORE STATIONERY option.
3. A "Select a Stationery" dialog box will appear - you should be able to find your new stationery in the list. Highlight it and click OK. That will open a new mail message for you using your stationery. Note: You will have to "click into" the typing space before composing a message. Just pressing the TAB key will not position your cursor correctly. See the notes at the end of these instructions for further information.

Note: After doing this the first time your new email stationery will appear at the top of your list whenever you click ACTIONS and then NEW MESSAGE USING.

## Section 4 - Configuring Outlook to use your stationery for replies to messages

Two options are available – please read the brief paragraphs below as they point out the pros and cons of each option.

Option A (Not available to users of Outlook 2000): Make the stationery appear automatically every time you go to reply to or forward a message. The advantage to this is that it is automated. There are two disadvantages to this approach. First of all, this approach will leave a two line space above your stationery for replies. There is no way around this - it's a Microsoft Outlook thing. Secondly, when you go to reply to a "plain-text" message your stationery will not appear, although most of your contact information will appear in a plain-text format.

Option B (Outlook 2000 users must use this option): Use your stationery selectively for replies and forwards. The advantage to this is that you will not get the two line space above your stationery. Also, you will be able to use your stationery properly when replying to plain-text messages, after learning a little "two-click" trick. The disadvantage is that you will have to manually insert your stationery into message replies when you want to use it. This takes two mouse clicks.

### **Option A - Making the stationery appear automatically every time you go to reply to or forward a message. (Not available to user of Outlook 2000)**

1. If you're not already in the MAIL FORMAT tab, from your inbox click TOOLS and then OPTIONS and then MAIL FORMAT to get there.
2. The bottom section is labeled "Signatures" - click the button that says SIGNATURES and then click NEW in the dialog box that appears.
3. Item 1 on this dialog screen asks you to name your new signature - type in a descriptive name (no need to include a .HTML this time)
4. In item 2 of this dialog screen click where it says "Use this file as a template"
5. Click the BROWSE button.
6. Now look at the top of this Windows dialog box to where it says "Look In:" - you will need to make a number of clicks here to change this to the correct folder.
7. First pull-down to C: or Local Disk C: or something with a name like that.
8. Next, in the middle window, double click the folder called PROGRAM FILES
9. Next, in the middle window, double click the folder called COMMON FILES
10. Next, in the middle window, double click the folder called MICROSOFT SHARED
11. Next, in the middle window, double click the folder called STATIONERY
12. You should see the file you saved in step 17 at the beginning of this process. Double click this file - you will be returned to the "Create a New Signature" dialog box - click NEXT.
13. Click FINISH from the "Edit Signature" dialog box.
14. You'll be returned to the "Create Signature" dialog box. Click OK to close this dialog box.
15. Now you're back at the MAIL FORMAT tab. Make sure that where it says "Use this signature for new messages" is set to <NONE>. If it isn't set this way, change it to <NONE> - "none" is at the top of your list.
16. Where it says "Use this signature for replies and forwards" make sure it is set to the signature name you just created.
17. Click APPLY and OK to close the OPTIONS dialog box. You should be all set. (Note: when replying to a "plain text" message your stationery will not appear, although most of your contact information should appear as plain-text.)

**Option B - Using your stationery selectively for replies and forwards (Outlook 2000 users must use this option)**

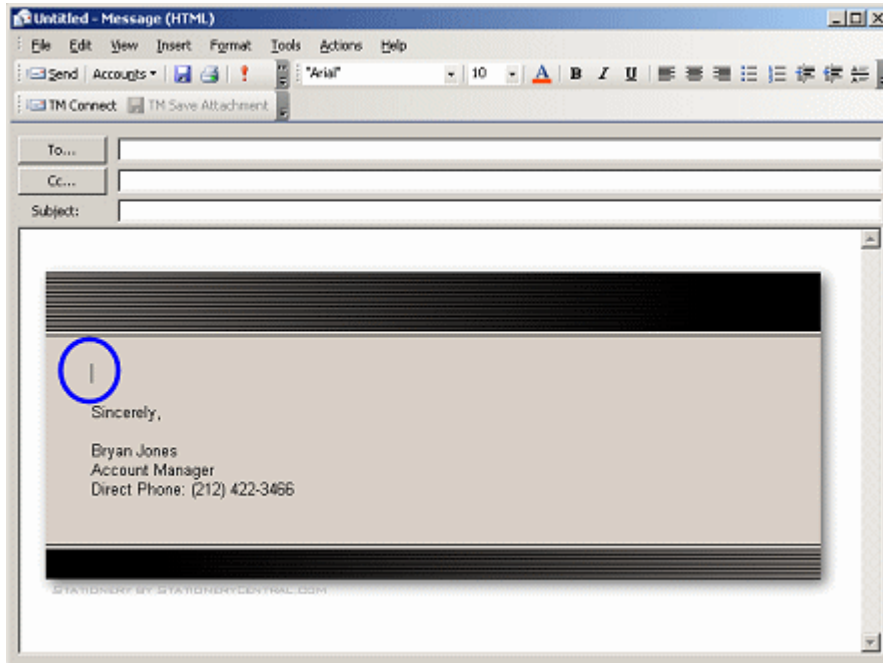
1. If you're not already in the MAIL FORMAT tab, from your inbox click TOOLS and then OPTIONS and then MAIL FORMAT to get there.
2. The bottom section is labeled "Signatures" - click the button that says SIGNATURES and then click NEW in the dialog box that appears.
3. Item 1 on this dialog screen asks you to name your new signature - type in a descriptive name (no need to include a .HTML this time)
4. In item 2 of this dialog screen click where it says "Use this file as a template"
5. Click the BROWSE button.
6. Now look at the top of this Windows dialog box to where it says "Look In:" - you will need to make a number of clicks here to change this to the correct folder.
7. First pull-down to C: or Local Disk C: or something with a name like that.
8. Next, in the middle window, double click the folder called PROGRAM FILES
9. Next, in the middle window, double click the folder called COMMON FILES
10. Next, in the middle window, double click the folder called MICROSOFT SHARED
11. Next, in the middle window, double click the folder called STATIONERY
12. You should see the file you saved in step 17 at the beginning of this process. Double click this file - you will be returned to the "Create a New Signature" dialog box - click NEXT.
13. Click FINISH from the "Edit Signature" dialog box.
14. You'll be returned to the "Create Signature" dialog box. Click OK to close this dialog box.
15. Now you're back at the MAIL FORMAT tab. Make sure that where it says "Use this signature for new messages" is set to <NONE>. If it isn't set this way, change it to <NONE> - "none" is at the top of your list.
16. Also make sure that "Use this signature for replies and forwards" is set to <NONE>.
17. Click APPLY and OK to close the OPTIONS dialog box.
18. Click open an email message and click reply.
19. Using your top menu bar click INSERT and then select SIGNATURE. In the list that appears you should see the signature you just created. If the list is full of other signatures, select MORE and you'll find your new signature.

Note: if you get a message saying that the "signature could not be located" it is because you are trying to insert an HTML signature into a plain-text message. The solution to this is to click FORMAT and pull down to HTML. After doing this, you can now click INSERT and then select your SIGNATURE.

## Section 5 - Tips on using your new stationery and answers questions you may have

### POSITIONING YOUR CURSOR FOR TYPING

When you go to compose a message you should see your new stationery. You will need to [manually click your cursor into the template](#) - beneath the top banner and above your personalized closing. Then just type normally:



### WHY YOUR STATIONERY GETS GOOFED UP WHEN SOME PEOPLE REPLY TO YOUR MESSAGES

Some e-mail programs do not support the SENDING of HTML e-mail. They do, however, receive it just fine. What happens though, is that when they reply to you, they have moved out of the receiving mode and into the sending mode, which their software can't do. So, although they see your stationery displayed properly, even when they're composing their reply and pressing the send button, when it is transmitted back to you the graphics are stripped away.

### WHY THE LINKS IN YOUR STATIONERY DON'T SEEM TO WORK

Hyperlinks in email do not work when you are in "compose" mode – they only work in "read mode." To test the links embedded in your stationery, compose a message and send it to yourself. You will discover that the links work correctly when you are reading the message.

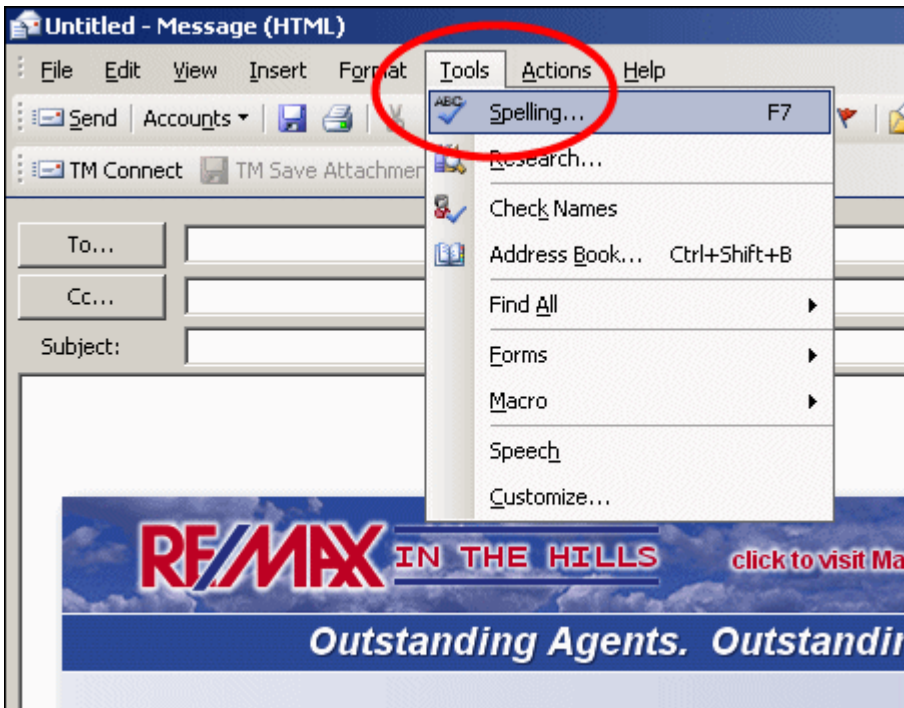
### WHY DO I SEE BLACK RECTANGLES AROUND PORTIONS OF MY STATIONERY WHEN I AM COMPOSING MESSAGES? WILL THE MESSAGE RECIPIENT SEE THESE?

Some, but not all, of our email stationery designs use an approach called "image-mapping" to create the various hyperlinks embedded in the graphic images. When this approach has been used you will see a black rectangle appear around the various mapped areas of the graphics. These rectangles only appear when you are in "compose mode" – they will not appear to the message recipient when they are reading your message.

## SPELL CHECKING YOUR EMAIL WITH “WORD” TURNED OFF

In working with many clients over the years we have discovered that just about the only reason anyone uses Microsoft Word to compose their email messages is to use its spell checking feature. Outlook actually has its own spell checking feature (that uses the exact same dictionary that Word uses). Now that you've turned Word off in order to use your new stationery, here's how to use Outlook's spell checker.

**Option 1 – Selective Use:** After composing your message, click TOOLS at the top and then select SPELLING. (Note – you'll find that spelling is turned off when the cursor is in the TO or CC fields – you must have the cursor in the SUBJECT field or in the BODY of the email to use spell check.):



**Option 2 – Automatic Use:** From your inbox click TOOLS at the top and pull down to OPTIONS. Click the SPELLING tab and check the box that says “Always check spelling before sending.”

