


Using Job Tracker with MS Word

Job Tracker can create Word documents and automatically merge information from the current job into the new document for you. Every new Word document is based on a template which you select when you create the new document for the job. Through the use of templates you can create your own standard documents.

Job Tracker installs several sample templates to help you get started. You can modify these templates to suit your own requirements or use them to create new templates.


How to modify existing and sample templates

To modify an existing template you open the template and make modifications to the text and/or insert new **Job Tracker** placeholders. The placeholder uses an **Identifier**: 'JTGetData' and a **Description**: the information or field you want to get from the **Job Tracker** database.

1. In MS Word, from the **File** menu, choose **Open**.
2. Locate the template (.dot) file you want to work with. All the **Job Tracker** template files will be stored in the directory where **Job Tracker** is installed.
3. Modify text as required
4. Insert **Job Tracker** placeholders by using the **Job Tracker** field toolbar button . This toolbar button should have been added via a macro when **Job Tracker** was installed.

How to create a new template for Job Tracker

Important: To create a new template to link with the **Job Tracker** database you must work with an existing or sample template and save it as a new template with a new name.

1. In MS Word, from the **File** menu, choose **Open**.
2. Locate a sample or existing template (.dot) file. All the **Job Tracker** template files will be stored in the directory where **Job Tracker** is installed.
3. From the **File** menu, choose **Save As** and give the template file a new name. Save the new template in the **Job Tracker** directory with the other existing and sample templates.
4. Enter new text or if you have text from another document that you want to use then copy and paste the text from the document into the template. Insert **Job Tracker** placeholders by using the **Job Tracker** field toolbar button .