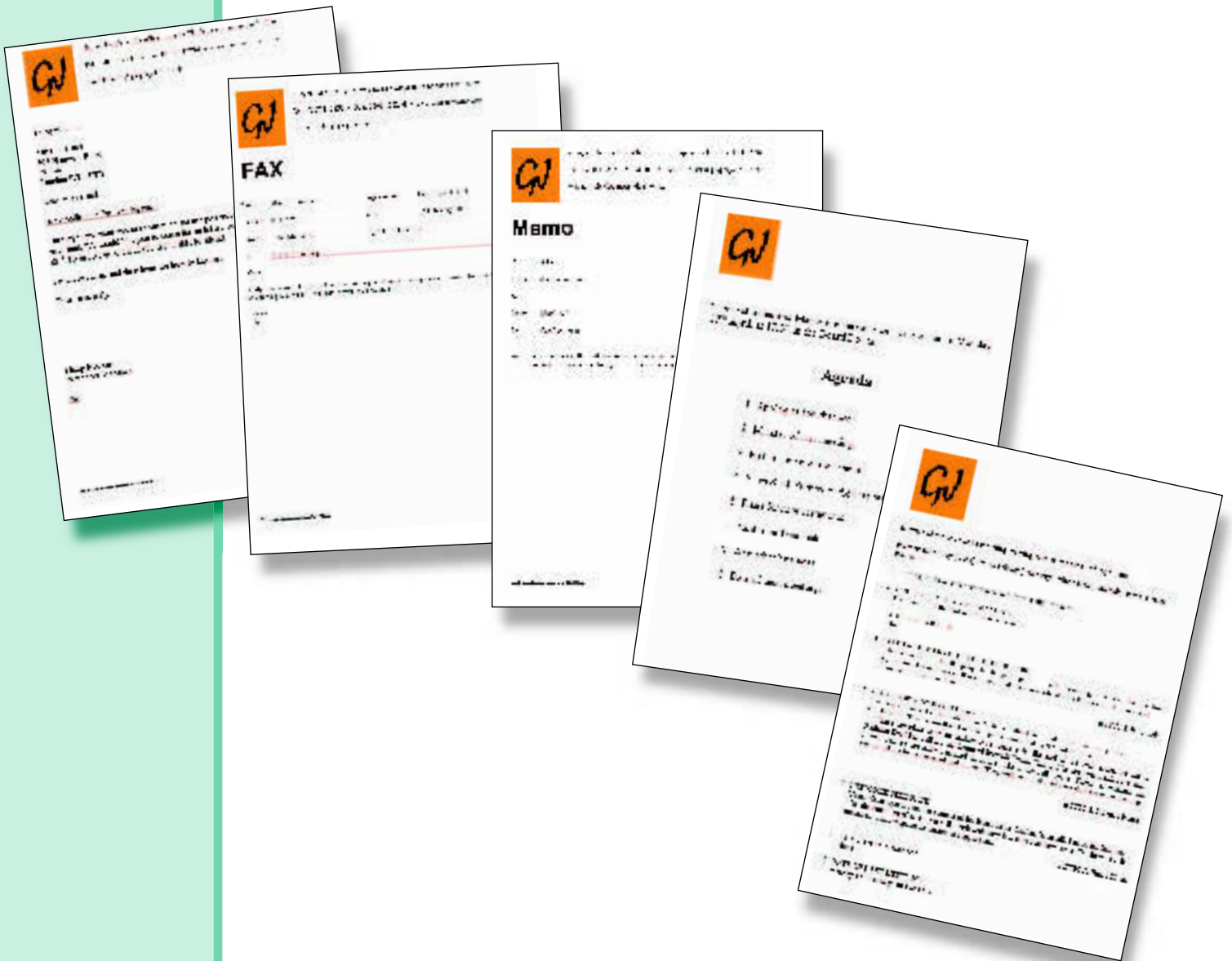


Chapter 4: Business Documents

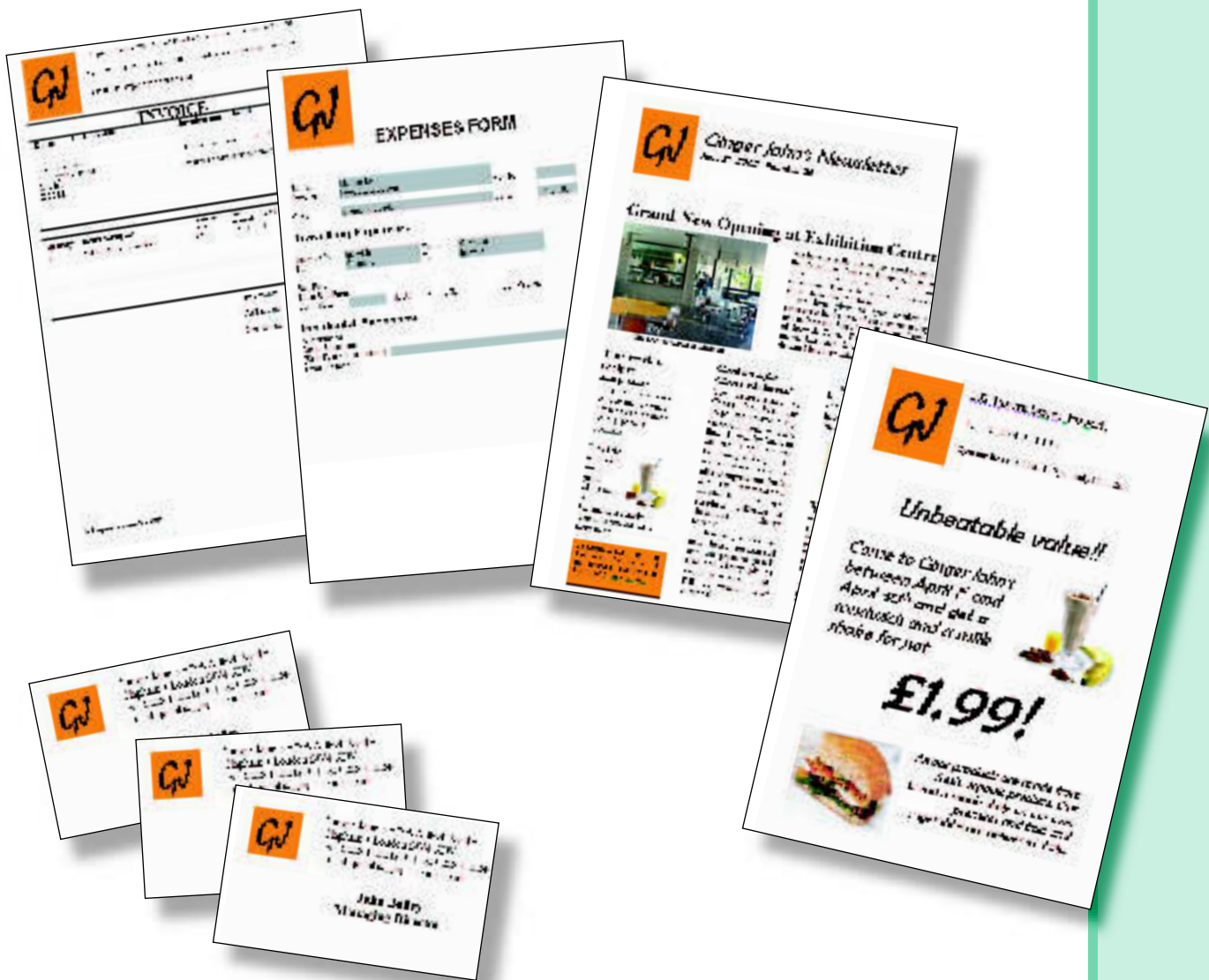
There are certain standard documents that almost all businesses use from time to time. These include:

- Letters
- Faxes
- Memos
- Agendas for meetings
- Minutes of meetings



In addition, a business may need to produce:

- An invoice
- A publicity flyer
- A newsletter
- A form (e.g. an application form or an Expenses form)
- A formal report
- Business cards



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Writing style

Different types of documents must be carefully planned and the following factors considered:

- Purpose of the document
- Target audience
- Writing style and tone
- Presentation style (e.g. use of colour and images)
- Layout
- Accuracy and clarity
- Consistency (e.g. house style)

You should look at a range of documents used by companies. Look at some of the 'junk mail' and flyers that come through the letterbox. Find some newsletters, invoices, business cards, questionnaires and other documents. What presentation techniques are used? These might include column layout, bullets, text boxes, different styles and colours of text and use of graphics.

Look at the writing style of different documents. Is it formal or informal? Who is it aimed at? What is the purpose of each document? Is it to inform, to entertain, to educate, to persuade, or to collect information?

Maintaining a house style

A business usually has its own logo, which may include a graphic image and a slogan or the name of the company written in a particular font. This helps to create a strong brand image that people recognise easily. Think of the logos of companies such as McDonald's, Ford and Nike. If you saw a McDonald's restaurant with a completely different sign outside, you would probably wonder if it was run by a different company.



The company logo will be used not only outside shops and on company products but also on stationery used to produce many different types of document. If you ever start your own business, one of the first things you will need to do is design some stationery for sending letters, faxes and invoices.

Tip:

The logo may vary in size, depending on where it is used, but its proportions and colour should always be the same.

Designing a logo




You can use the drawing tools in Word to create a logo and templates for stationery.

We will design a simple logo for Ginger John's chain of snack bars.

- ▶ Open a new document in Word.
- ▶ Make sure the Drawing toolbar is visible. It may be at the bottom of your screen. If it is not, from the **View** menu select **Toolbars**. Check **Drawing**.



Figure 4.1: The Drawing toolbar

- ▶ Select the **Textbox** tool and draw out a box about 2cm wide by 3cm tall. 
- ▶ Select a font. In the picture below, the font is **Mistral**. Select font size **72**.
- ▶ In the text box type the letters **GJ**.
- ▶ Select the **Fill** tool and fill the box with an orange colour. 
- ▶ Select the **Line** tool and specify **No line**. 

Your logo should look something like the one below.



- ▶ Right-click the border of the logo and choose **Copy** from the pop-up menu. You will need it in a minute.
- ▶ Save the document with the logo, as you will need to copy it onto various documents. Name the file *GJ Logo.doc*.

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Creating a letter template

Ginger John's will need some headed stationery for its business letters. This needs to display the logo, the name and address of the company, the telephone and fax numbers. It will also specify the web site address and an e-mail address. In addition, as it has a turnover of well over £50,000 p.a., it will have to be registered for VAT and its VAT registration number should appear on the stationery.

We will create a letter template similar to the one below.

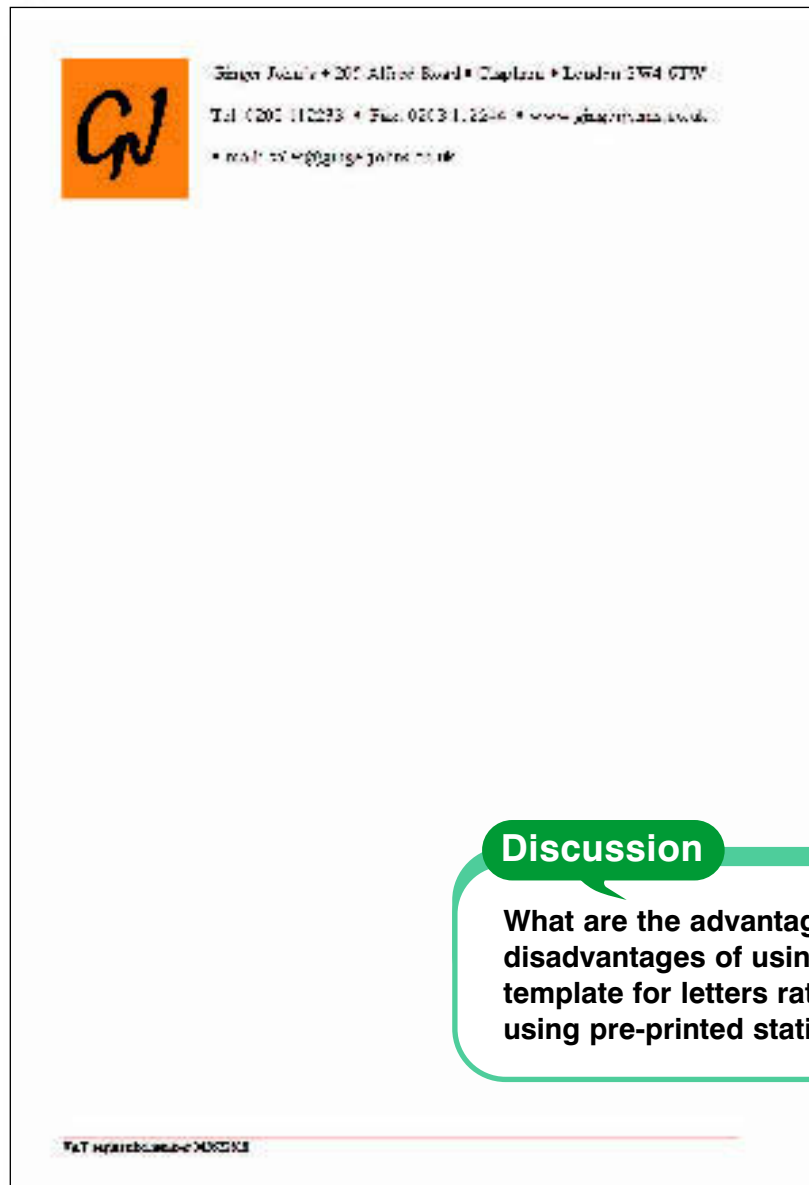
Tip:

A **template** is a document in a particular format that you can add your own text to – you can use it instead of opening a new, blank document to write a letter, fax or other document and then printing it on company stationery.

MS Word has several built-in templates. Experiment by selecting **File, New** and then selecting **General Templates**.

Try out, for example, **Elegant fax**. If you saved your document, the template would remain unchanged for you to use another time.

This time, close without saving.



Discussion

What are the advantages and disadvantages of using a template for letters rather than using pre-printed stationery?

Figure 4.2: A letter template

Header and footer

- ▶ Open a new document in Word.

We will put the logo and company information into a header and footer. This keeps it separate from the contents of the letter.

- ▶ From the **View** menu select **Header and Footer**.

- ▶ Paste the logo into the top left-hand corner of the header. (You'll need to drag it into position.)

- ▶ Double-click to the right of the logo to create an insertion point. Type the first line of the address in **Times Roman**, size **12**:

Ginger John's 205 Alfred Road Clapham London SW4 6TW

- ▶ To separate the name and the parts of the address we will insert little bullet symbols. Position the cursor between **Ginger John's** and **205 Alfred Road** and from the **Insert** menu select **Symbol**.

- ▶ Select the **Wingdings** font and find a suitable bullet character.

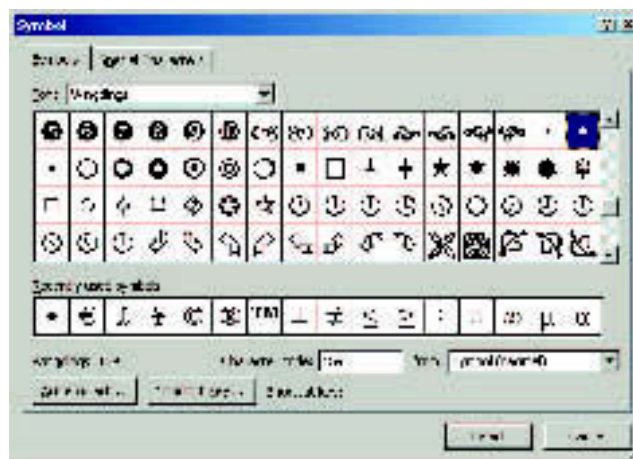


Figure 4.3: Inserting a symbol

- ▶ Click **Insert**. Then insert the same character between the other parts of the address:

Ginger John's • 205 Alfred Road • Clapham • London SW4 6TW

- ▶ Type the next two lines:

Tel: 0208 112233 • Fax: 0208 112244 • www.gingerjohns.co.uk
e-mail: sales@gingerjohns.co.uk

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Your header should now look like Figure 4.4:

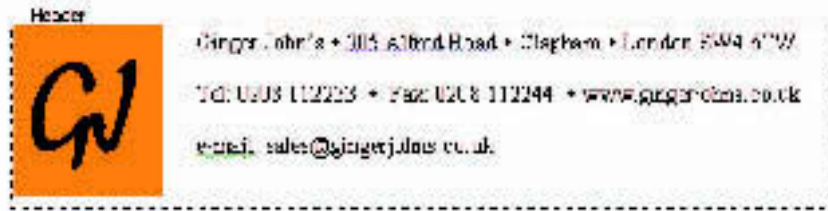


Figure 4.4: The logo and address information in a header



In the Header and Footer toolbar, click the **Switch between Header and Footer** button.



Type the VAT registration number in the footer, using size 8 Times Roman font.



Click the **Outside Border** button on the Formatting toolbar and select **Top Border**.



This will put a line above the VAT number to separate it from the letter contents.

VAT registration number 045632818



Press the **Close** button on the Header and Footer toolbar.



Your letter template is ready! Save it as *GJ Letter Template.doc*.

Writing a business letter

You should know the correct way to set out a business letter.

A Word template has an extension **.dot**, but you may not be able to save a **.dot** file on a school network, so we will save it as an ordinary document.

A business letter should show:

- The date
- The recipient's address
- A reference by which the letter can be referred to
- The recipient's letter reference if replying to a letter
- A greeting
- The topic of the letter
- The signature, name and title of the sender
- The abbreviation **Enc** if there are any enclosures

Below is a letter from the Personnel Manager at Ginger John's to a prospective employee, inviting them for an interview.

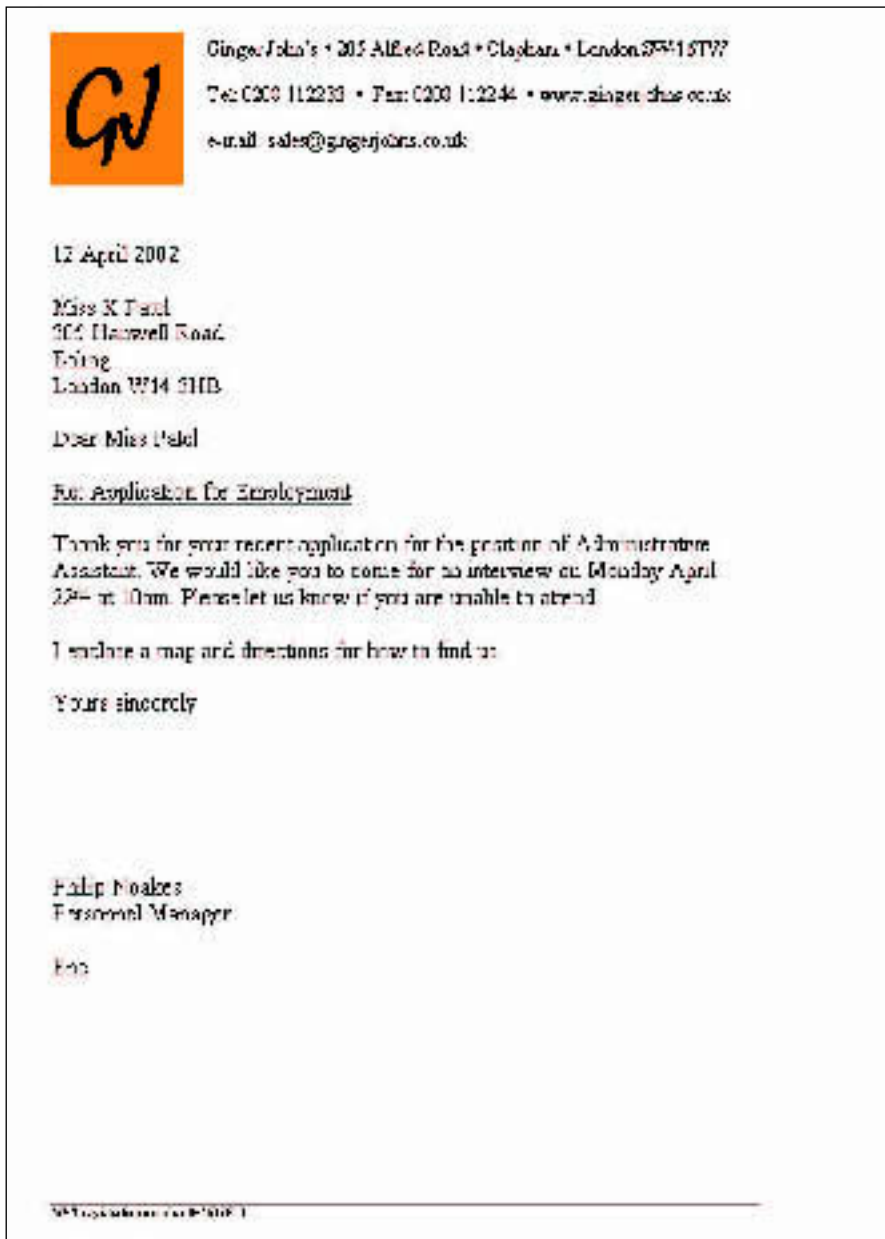


Figure 4.5: A business letter

To use your template for a letter, you will need to open **GJ Letter Template.doc** if it is not already open. Then from the **File** menu choose **Save As** and select a new name for the letter.

Note that all the text in the letter is left-justified, and there is a blank line between paragraphs.

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A fax template

A fax machine is very useful for sending documents of all kinds, including maps and hand-written text. Whatever is being sent, the first sheet should show certain basic information such as who the fax is from, who it is going to, the date and the number of pages to follow.

Your next task is to create a fax header sheet like the one shown in Figure 4.6.

Ginger John's • 205 Alfred Road • Clapton • London E7 4 5TF
Tel: 0208 1.2213 • Fax: 0208 1.2214 • www.gingerjohns.co.uk
e-mail: sales@gingerjohns.co.uk

FAX

To: _____ Organisation: _____
Fax no: _____ Date: _____
From: _____ Pages to follow: _____
Re: _____

Figure 4.6: A Fax header sheet

- ▶ Open **GJ Letter Template.doc**.
- ▶ From the **File** menu choose **Save As** and name the new document **GJ Fax Template.doc**.
- ▶ Underneath the header, press **Enter** to leave a blank line and then change the font to **Arial, Bold**, size **36**. Type the word **FAX**.
- ▶ Change the font to **Times New Roman**, size **12**, not bold. It should be left justified.

Inserting a table

We are going to insert a table to hold the headings and to leave space for the writer to enter the information.

- Click the **Insert Table** button on the Standard toolbar and drag across 4 columns and 4 rows. When you release the mouse button, a table of 4 rows and 4 columns will be inserted.

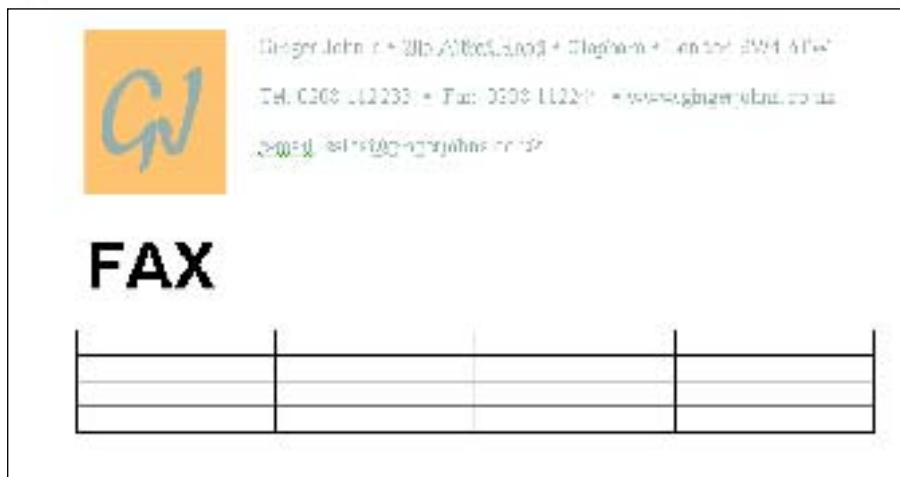


Figure 4.7: Inserting a table into a document

- Enter headings as follows:

To:		Organisation:	
Fax no:		Date:	
From:		Pages to follow:	
Re:			

We don't want the gridlines showing.

- Select the table by clicking the little cross that appears at the top left hand corner when you hover the mouse over the table.
- Click the **Border** button and choose **No Border**.
- Adjust the column widths so that the columns are just wide enough for the headings.

Tip:

A **table** is a grid of rows and columns. Tables are very useful whenever you want information displayed neatly lined up, or in rows and columns like a school or railway timetable.

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Formatting and merging cells

The rows are too narrow for someone to write in by hand. They need to be made deeper.

- ▶ Select the table and from the **Table** menu select **Table Properties...**
- ▶ Click the **Row** tab and specify a height of 1cm. Click **OK**.



Figure 4.8: Changing the row height

- ▶ Save your template.
- ▶ Click the **Print Preview** button to see what it will look like when printed.

It could be improved by putting lines where the user writes information. You can do this by putting lower borders in the appropriate cells.

You will then see that you need to move the text down in each cell so that it lines up with the line.

- ▶ Do this by selecting the table, clicking on **Table**, **Table Properties**, selecting the **Cell** tab and choosing **Bottom**.

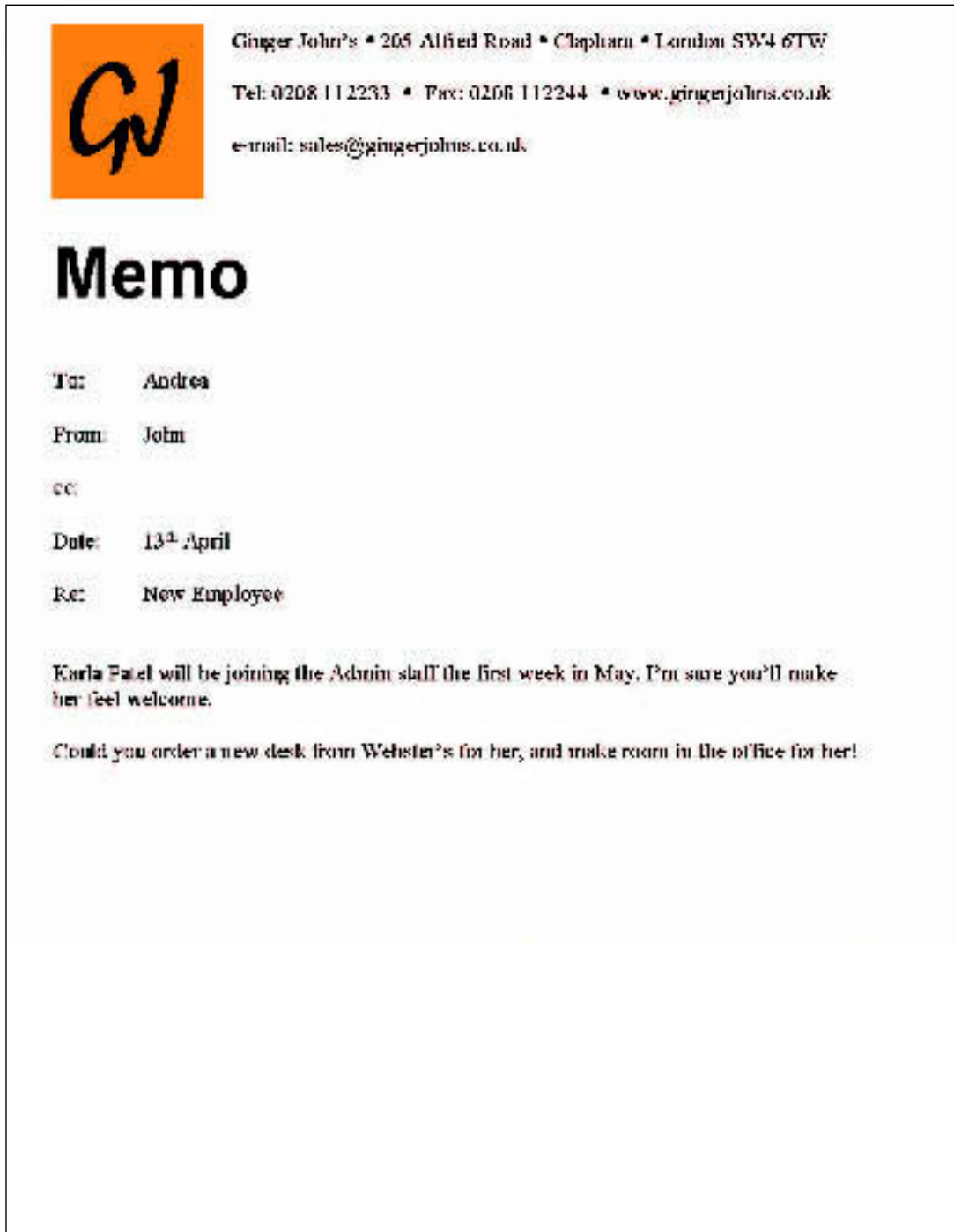
The last row does not need to be divided into 4 cells. You can merge the three blank cells to make one large cell.

- ▶ Select the three blank cells in the bottom row.
- ▶ From the **Table** menu select **Merge cells**.

It should look like Figure 4.6! Save it again.

Memos

A memo is used for informal communication within an organisation. It should specify who it is from, who it is to, anyone who is to receive a copy, the date and the topic of the memo. An example is shown below.



Note that a memo is not signed - it is for internal use and the name of the sender appears above the message, "From:"

Figure 4.9: A memo

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Exercises

These exercises are based on the sample tasks published by Edexcel.

During busy periods, BurgersAway! employs many extra staff who do not always know about company standards and procedures. Mr Tariq feels that setting common standards will improve communication and customer service. He would also like a new logo on all the company's paper-based and electronic documents.

You need to produce five documents using relevant company information.

(n.b. Some of these documents are described in the next two chapters.)

1. Design a new company logo. Include it on all your documents.
2. The company needs a standard fax header template.
 - Create this template using suitable software.
 - Print a copy of your template on one A4 sheet.
3. The company needs a new letterhead.
 - Create a letterhead.
 - Use this letterhead to write a business letter on behalf of the Managing Director. The letter will inform the competition winner of their prize.
 - Print the letter.