



# OFFICE WORKSHOP TRAINING MANUAL TEMPLATE

Elevate your training programs with  
our Office Workshop Training Manual  
Template.

**5 Pages**

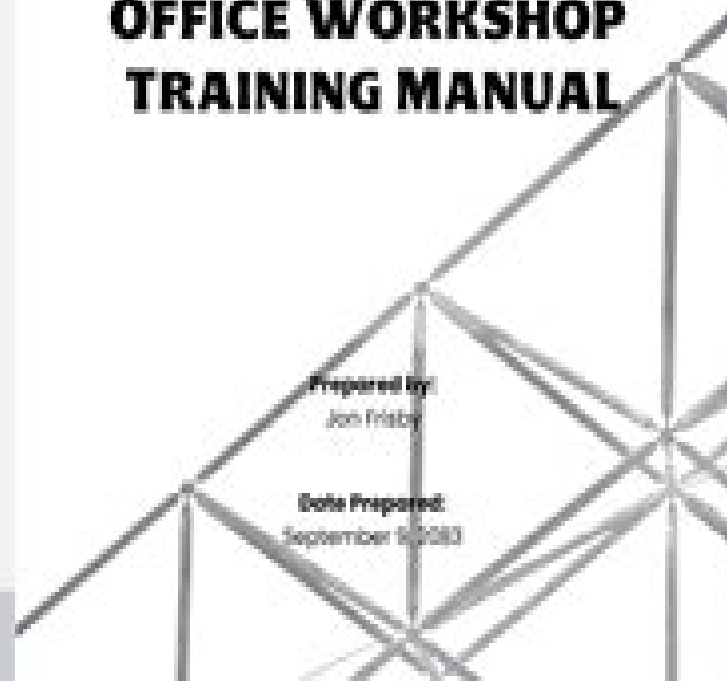


HV & CO

## OFFICE WORKSHOP TRAINING MANUAL

Prepared by:  
Jon Frisby

Date Prepared:  
September 9, 2023



# Microsort Word Training Manual Template

**TeachUcomp**

The logo for TeachUcomp, featuring a stylized red and white circular graphic that resembles a stylized 'U' or a computer monitor screen.

## **Microsort Word Training Manual Template:**

Microsoft Word 2019 for Lawyers Training Manual Classroom in a Book TeachUcomp ,2020-10-27 Complete classroom training manuals for Microsoft Word 2019 for Lawyers 396 pages and 223 individual topics Includes practice exercises and keyboard shortcuts You will learn how to perform legal reviews create citations and authorities and use legal templates In addition you ll receive our complete Word curriculum Topics Covered Getting Acquainted with Word 1 About Word 2 The Word Environment 3 The Title Bar 4 The Ribbon 5 The File Tab and Backstage View 6 The Quick Access Toolbar 7 Touch Mode 8 The Ruler 9 The Scroll Bars 10 The Document View Buttons 11 The Zoom Slider 12 The Status Bar 13 The Mini Toolbar 14 Keyboard Shortcuts Creating Basic Documents 1 Opening Documents 2 Closing Documents 3 Creating New Documents 4 Saving Documents 5 Recovering Unsaved Documents 6 Entering Text 7 Moving through Text 8 Selecting Text 9 Non Printing Characters 10 Working with Word File Formats 11 AutoSave Online Documents Document Views 1 Changing Document Views 2 Showing and Hiding the Ruler 3 Showing and Hiding Gridlines 4 Showing and Hiding the Navigation Pane 5 Zooming the Document 6 Opening a Copy of a Document in a New Window 7 Arranging Open Document Windows 8 Split Window 9 Comparing Open Documents 10 Switching Open Documents 11 Switching to Full Screen View Basic Editing Skills 1 Deleting Text 2 Cutting Copying and Pasting 3 Undoing and Redoing Actions 4 Finding and Replacing Text 5 Selecting Text and Objects Basic Proofing Tools 1 The Spelling and Grammar Tool 2 Setting Default Proofing Options 3 Using the Thesaurus 4 Finding the Word Count 5 Translating Documents 6 Read Aloud in Word Font Formatting 1 Formatting Fonts 2 The Font Dialog Box 3 The Format Painter 4 Applying Styles to Text 5 Removing Styles from Text Formatting Paragraphs 1 Aligning Paragraphs 2 Indenting Paragraphs 3 Line Spacing and Paragraph Spacing Document Layout 1 About Documents and Sections 2 Setting Page and Section Breaks 3 Creating Columns in a Document 4 Creating Column Breaks 5 Using Headers and Footers 6 The Page Setup Dialog Box 7 Setting Margins 8 Paper Settings 9 Layout Settings 10 Adding Line Numbers 11 Hyphenation Settings Using Templates 1 Using Templates 2 Creating Personal Templates Printing Documents 1 Previewing and Printing Documents Helping Yourself 1 The Tell Me Bar and Microsoft Search 2 Using Word Help 3 Smart Lookup Working with Tabs 1 Using Tab Stops 2 Using the Tabs Dialog Box Pictures and Media 1 Inserting Online Pictures 2 Inserting Your Own Pictures 3 Using Picture Tools 4 Using the Format Picture Task Pane 5 Fill Line Settings 6 Effects Settings 7 Alt Text 8 Picture Settings 9 Inserting Screenshots 10 Inserting Screen Clippings 11 Inserting Online Video 12 Inserting Icons 13 Inserting 3D Models 14 Formatting 3D Models Drawing Objects 1 Inserting Shapes 2 Inserting WordArt 3 Inserting Text Boxes 4 Formatting Shapes 5 The Format Shape Task Pane 6 Inserting SmartArt 7 Design and Format SmartArt 8 Inserting Charts Using Building Blocks 1 Creating Building Blocks 2 Using Building Blocks Styles 1 About Styles 2 Applying Styles 3 Showing Headings in the Navigation Pane 4 The Styles Task Pane 5 Clearing Styles from Text 6 Creating a New Style 7 Modifying an Existing Style 8 Selecting All Instances of a Style in a Document 9 Renaming Styles 10 Deleting Custom Styles

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Legal Documents and Printing 1 Printing on Legal Paper 2 Using Legal Templates in Word 3 WordPerfect to Word Migration Issues

**QuickBooks Desktop Pro 2020 Training Manual Classroom in a Book** TeachUcomp ,2019-10-01 Complete classroom training manual for QuickBooks Desktop Pro 2020 296 pages and 189 individual topics Includes practice exercises and keyboard shortcuts You will learn how to set up a QuickBooks company file pay employees and vendors create custom reports reconcile your accounts use estimating time tracking and much more Topics Covered

The QuickBooks Environment 1 The Home Page and Insight Tabs 2 The Centers 3 The Menu Bar and Keyboard Shortcuts 4 The Open Window List 5 The Icon Bar 6 Customizing the Icon Bar 7 The Chart of Accounts 8 Accounting Methods 9 Financial Reports

Creating a QuickBooks Company File 1 Using Express Start 2 Using the EasyStep Interview 3 Returning to the Easy Step Interview 4 Creating a Local Backup Copy 5 Restoring a Company File from a Local Backup Copy 6 Setting Up Users 7 Single and Multiple User Modes 8 Closing Company Files 9 Opening a Company File Using Lists 1 Using Lists 2 The Chart of Accounts 3 The Customers Jobs List 4 The Employees List 5 The Vendors List 6 Using Custom Fields 7 Sorting List 8 Inactivating and Reactivating List Items 9 Printing Lists 10 Renaming Merging List Items 11 Adding Multiple List Entries from Excel

Setting Up Sales Tax 1 The Sales Tax Process 2 Creating Tax Agencies 3 Creating Individual Sales Tax Items 4 Creating a Sales Tax Group 5 Setting Sales Tax Preferences 6 Indicating Taxable Non taxable Customers and Items

Setting Up Inventory Items 1 Setting Up Inventory 2 Creating Inventory Items 3 Creating a Purchase Order 4 Receiving Items with a Bill 5 Entering Item Receipts 6 Matching Bills to Item Receipts 7 Adjusting Inventory

Setting Up Other Items 1 Service Items 2 Non Inventory Items 3 Other Charges 4 Subtotals 5 Groups 6 Discounts 7 Payments 8 Changing Item Prices

Basic Sales 1 Selecting a Sales Form 2 Creating an Invoice 3 Creating Batch Invoices 4 Creating a Sales Receipt 5 Finding Transaction Forms 6 Previewing Sales Forms 7 Printing Sales Forms

Using Price Levels 1 Using Price Levels Creating Billing Statements 1 Setting Finance Charge Defaults 2 Entering Statement Charges 3 Applying Finance Charges and Creating Statements

Payment Processing 1 Recording Customer Payments 2 Entering a Partial Payment 3 Applying One Payment to Multiple Invoices 4 Entering Overpayments 5 Entering Down Payments or Prepayments 6 Applying Customer Credits 7 Making Deposits 8 Handling Bounced Checks 9 Automatically Transferring Credits Between Jobs 10 Manually Transferring Credits Between Jobs

Handling Refunds 1 Creating a Credit Memo and Refund Check 2 Refunding Customer Payments

Entering and Paying Bills 1 Setting Billing Preferences 2 Entering Bills 3 Paying Bills 4 Early Bill Payment Discounts 5 Entering a Vendor Credit 6 Applying a Vendor Credit Using Bank Accounts 1 Using Registers 2 Writing Checks 3 Writing a Check for Inventory Items 4 Printing Checks 5 Transferring Funds 6 Reconciling Accounts 7 Voiding Checks

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Reporting 1 Graph and Report Preferences 2 Using QuickReports 3 Using QuickZoom 4 Preset Reports 5 Modifying a Report 6 Rearranging and Resizing Report Columns 7 Memorizing a Report 8 Memorized Report Groups 9 Printing Reports 10 Batch Printing Forms 11 Exporting Reports to Excel

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 Migrator Tool Using the Accountant's Review 1 Creating an Accountant's Copy 2 Transferring an Accountant's Copy 3  
 Importing Accountant's 4 Removing Restrictions Using the Help Menu 1 Using Help      **QuickBooks Pro 2023 for**  
**Lawyers Training Manual Classroom in a Book** TeachUcomp , Complete classroom training manual for QuickBooks Pro  
 2023 for Lawyers Full classroom manual in one book 351 pages and 213 individual topics Includes practice exercises and  
 keyboard shortcuts You will learn how to create and effectively manage a legal company file as well as use QuickBooks for  
 trust accounting In addition you ll receive our complete QuickBooks curriculum Topics Covered The QuickBooks

Environment 1 The Home Page 2 The Centers 3 The Menu Bar and Keyboard Shortcuts 4 The Open Window List 5 The Icon Bar 6 Customizing the Icon Bar 7 The Chart of Accounts 8 Accounting Methods 9 Financial Reports Creating a QuickBooks Company File 1 Using Express Start 2 Using the EasyStep Interview 3 Returning to the Easy Step Interview 4 Creating a Local Backup Copy 5 Restoring a Company File from a Local Backup Copy 6 Setting Up Users 7 Single and Multiple User Modes 8 Closing Company Files 9 Opening a Company File Using Lists 1 Using Lists 2 The Chart of Accounts 3 The Customers Jobs List 4 The Employees List 5 The Vendors List 6 Using Custom Fields 7 Sorting List 8 Inactivating and Reactivating List Items 9 Printing Lists 10 Renaming Merging List Items 11 Adding Multiple List Entries from Excel 12 Customer Groups Setting Up Sales Tax 1 The Sales Tax Process 2 Creating Tax Agencies 3 Creating Individual Sales Tax Items 4 Creating a Sales Tax Group 5 Setting Sales Tax Preferences 6 Indicating Taxable Non taxable Customers and Items Setting Up Inventory Items 1 Setting Up Inventory 2 Creating Inventory Items 3 Creating a Purchase Order 4 Receiving Items with a Bill 5 Entering Item Receipts 6 Matching Bills to Item Receipts 7 Adjusting Inventory Setting Up Other Items 1 Service Items 2 Non Inventory Items 3 Other Charges 4 Subtotals 5 Groups 6 Discounts 7 Payments 8 Changing Item Prices Basic Sales 1 Selecting a Sales Form 2 Creating an Invoice 3 Creating Batch Invoices 4 Creating a Sales Receipt 5 Finding Transaction Forms 6 Previewing Sales Forms 7 Printing Sales Forms Using Price Levels 1 Using Price Levels Creating Billing Statements 1 Setting Finance Charge Defaults 2 Entering Statement Charges 3 Applying Finance Charges and Creating Statements Payment Processing 1 Recording Customer Payments 2 Entering a Partial Payment 3 Applying One Payment to Multiple Invoices 4 Entering Overpayments 5 Entering Down Payments or Prepayments 6 Applying Customer Credits 7 Making Deposits 8 Handling Bounced Checks 9 Automatically Transferring Credits Between Jobs 10 Manually Transferring Credits Between Jobs Handling Refunds 1 Creating a Credit Memo and Refund Check 2 Refunding Customer Payments Entering and Paying Bills 1 Setting Billing Preferences 2 Entering Bills 3 Paying Bills 4 Early Bill Payment Discounts 5 Entering a Vendor Credit 6 Applying a Vendor Credit 7 Upload and Review Bills Using Bank Accounts 1 Using Registers 2 Writing Checks 3 Writing a Check for Inventory Items 4 Printing Checks 5 Transferring Funds 6 Reconciling Accounts 7 Voiding Checks 8 Adding Bank Feeds 9 Reviewing Bank Feed Transactions 10 Bank Feed Rules 11 Disconnecting Bank Feed Accounts Paying Sales Tax 1 Sales Tax Reports 2 Using the Sales Tax Payable Register 3 Paying Your Tax Agencies Reporting 1 Graph and Report Preferences 2 Using QuickReports 3 Using QuickZoom 4 Preset Reports 5 Modifying a Report 6 Rearranging and Resizing Report Columns 7 Memorizing a Report 8 Memorized Report Groups 9 Printing Reports 10 Batch Printing Forms 11 Exporting Reports to Excel 12 Saving Forms and Reports as PDF Files 13 Comment on a Report 14 Process Multiple Reports 15 Scheduled Reports Using Graphs 1 Using Graphs 2 Company Snapshot Customizing Forms 1 Creating New Form Templates 2 Performing Basic Customization 3 Performing Additional Customization 4 The Layout Designer 5 Changing the Grid and Margins in the Layout Designer 6 Selecting Objects in the Layout Designer 7 Moving and

Resizing Objects in the Layout Designer 8 Formatting Objects in the Layout Designer 9 Copying Objects and Formatting in the Layout Designer 10 Adding and Removing Objects in the Layout Designer 11 Aligning and Stacking Objects in the Layout Designer 12 Resizing Columns in the Layout Designer Estimating 1 Creating a Job 2 Creating an Estimate 3 Duplicating Estimates 4 Invoicing From Estimates 5 Updating Job Statuses 6 Inactivating Estimates 7 Making Purchases for a Job 8 Invoicing for Job Costs 9 Using Job Reports Time Tracking 1 Tracking Time and Printing a Blank Timesheet 2 Weekly Timesheets 3 Time Enter Single Activity 4 Invoicing from Time Data 5 Using Time Reports 6 Tracking Vehicle Mileage 7 Charging Customers for Mileage Payroll 1 The Payroll Process 2 Creating Payroll Items 3 Setting Employee Defaults 4 Setting Up Employee Payroll Information 5 Creating Payroll Schedules 6 Creating Scheduled Paychecks 7 Creating Unscheduled Paychecks 8 Creating Termination Paychecks 9 Voiding Paychecks 10 Tracking Your Tax Liabilities 11 Paying Your Payroll Tax Liabilities 12 Adjusting Payroll Liabilities 13 Entering Liability Refund Checks 14 Process Payroll Forms 15 Tracking Workers Compensation Using Credit Card Accounts 1 Creating Credit Card Accounts 2 Entering Credit Card Charges 3 Reconciling and Paying Credit Cards Assets and Liabilities 1 Assets and Liabilities 2 Creating and Using an Other Current Asset Account 3 Removing Value from Other Current Asset Accounts 4 Creating Fixed Asset Accounts 5 Creating Liability Accounts 6 Setting the Original Cost of Fixed Assets 7 Tracking Depreciation 8 The Fixed Asset Item List Equity Accounts 1 Equity Accounts 2 Recording an Owner s Draw 3 Recording a Capital Investment Writing Letters With QuickBooks 1 Using the Letters and Envelopes Wizard 2 Editing Letter Templates Company Management 1 Viewing Your Company Information 2 Setting Up Budgets 3 Using the To Do List 4 Using Reminders and Setting Preferences 5 Making General Journal Entries 6 Using Payment Reminders 7 Receipt Management Using QuickBooks Tools 1 Company File Cleanup 2 Exporting and Importing List Data Using IIF Files 3 Advanced Importing of Excel Data 4 Updating QuickBooks 5 Using the Calculator 6 Using the Portable Company Files 7 Using the Calendar 8 The Income Tracker 9 The Bill Tracker 10 The Lead Center 11 Moving QuickBooks Desktop Using the Migrator Tool Using the Accountant s Review 1 Creating an Accountant s Copy 2 Transferring an Accountant s Copy 3 Importing Accountant s 4 Removing Restrictions Using the Help Menu 1 Using Help Creating a Legal Company File 1 Making a Legal Company Using Express Start 2 Making a Legal Company Using the EasyStep Interview 3 Reviewing the Default Chart of Accounts 4 Entering Vendors 5 Entering Clients and Cases 6 Enabling Class Tracking for Law Firms 7 Creating Billing Line Items Setting up a Trust Account 1 What is an IOLTA 2 Creating Accounts for Trust Management 3 Creating Items for Trust Management Managing a Trust Account 1 Depositing Client Money into the Client Trust Account 2 Entering Bills to Pay from the Trust Account 3 Recording Bills for Office Expenses 4 Paying Bills from the Client Trust Account 5 Using a Client Trust Credit Card 6 Time Tracking and Invoicing for Legal Professionals 7 Paying the Law Firm s Invoices Using the Client Funds 8 Refunding Unused Client Trust Account Funds 9 Escheated Trust Funds Trust Account Reporting 1 Creating a Trust Account Liability Proof Report 2



Creating a Trust Liability Balances by Client Report 3 Creating a Client Ledger Report 4 Creating an Account Journal Report

**QuickBooks Pro 2020 for Lawyers Training Manual Classroom in a Book** TeachUcomp ,2019-10-27 Complete classroom training manuals for QuickBooks Pro 2020 for Lawyers Full classroom manual in one book 344 pages and 212 individual topics Includes practice exercises and keyboard shortcuts You will learn how to create and effectively manage a legal company file as well as use QuickBooks for trust accounting In addition you ll receive our complete QuickBooks curriculum Topics Covered The QuickBooks Environment 1 The Home Page and Insights Tabs 2 The Centers 3 The Menu Bar and Keyboard Shortcuts 4 The Open Window List 5 The Icon Bar 6 Customizing the Icon Bar 7 The Chart of Accounts 8 Accounting Methods 9 Financial Reports Creating a QuickBooks Company File 1 Using Express Start 2 Using the EasyStep Interview 3 Returning to the Easy Step Interview 4 Creating a Local Backup Copy 5 Restoring a Company File from a Local Backup Copy 6 Setting Up Users 7 Single and Multiple User Modes 8 Closing Company Files 9 Opening a Company File Using Lists 1 Using Lists 2 The Chart of Accounts 3 The Customers Jobs List 4 The Employees List 5 The Vendors List 6 Using Custom Fields 7 Sorting List 8 Inactivating and Reactivating List Items 9 Printing Lists 10 Renaming Merging List Items 11 Adding Multiple List Entries from Excel Setting Up Sales Tax 1 The Sales Tax Process 2 Creating Tax Agencies 3 Creating Individual Sales Tax Items 4 Creating a Sales Tax Group 5 Setting Sales Tax Preferences 6 Indicating Taxable Non taxable Customers and Items Setting Up Inventory Items 1 Setting Up Inventory 2 Creating Inventory Items 3 Creating a Purchase Order 4 Receiving Items with a Bill 5 Entering Item Receipts 6 Matching Bills to Item Receipts 7 Adjusting Inventory Setting Up Other Items 1 Service Items 2 Non Inventory Items 3 Other Charges 4 Subtotals 5 Groups 6 Discounts 7 Payments 8 Changing Item Prices Basic Sales 1 Selecting a Sales Form 2 Creating an Invoice 3 Creating Batch Invoices 4 Creating a Sales Receipt 5 Finding Transaction Forms 6 Previewing Sales Forms 7 Printing Sales Forms Using Price Levels 1 Using Price Levels Creating Billing Statements 1 Setting Finance Charge Defaults 2 Entering Statement Charges 3 Applying Finance Charges and Creating Statements Payment Processing 1 Recording Customer Payments 2 Entering a Partial Payment 3 Applying One Payment to Multiple Invoices 4 Entering Overpayments 5 Entering Down Payments or Prepayments 6 Applying Customer Credits 7 Making Deposits 8 Handling Bounced Checks 9 Automatically Transferring Credits Between Jobs 10 Manually Transferring Credits Between Jobs Handling Refunds 1 Creating a Credit Memo and Refund Check 2 Refunding Customer Payments Entering and Paying Bills 1 Setting Billing Preferences 2 Entering Bills 3 Paying Bills 4 Early Bill Payment Discounts 5 Entering a Vendor Credit 6 Applying a Vendor Credit Using Bank Accounts 1 Using Registers 2 Writing Checks 3 Writing a Check for Inventory Items 4 Printing Checks 5 Transferring Funds 6 Reconciling Accounts 7 Voiding Checks Paying Sales Tax 1 Sales Tax Reports 2 Using the Sales Tax Payable Register 3 Paying Your Tax Agencies Reporting 1 Graph and Report Preferences 2 Using QuickReports 3 Using QuickZoom 4 Preset Reports 5 Modifying a Report 6 Rearranging and Resizing Report Columns 7 Memorizing a Report 8 Memorized Report Groups 9 Printing Reports 10 Batch

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Item List Equity Accounts 1 Equity Accounts 2 Recording an Owner s Draw 3 Recording a Capital Investment Writing Letters  
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Your Company Information 2 Setting Up Budgets 3 Using the To Do List 4 Using Reminders and Setting Preferences 5  
Making General Journal Entries 6 Using the Cash Flow Projector 7 Using Payment Reminders Using QuickBooks Tools 1  
Company File Cleanup 2 Exporting and Importing List Data Using IIF Files 3 Advanced Importing of Excel Data 4 Updating  
QuickBooks 5 Using the Calculator 6 Using the Portable Company Files 7 Using the Calendar 8 The Income Tracker 9 The  
Bill Tracker 10 The Lead Center 11 Moving QuickBooks Desktop Using the Migrator Tool Using the Accountant s Review 1  
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Using the Help Menu 1 Using Help Creating a Legal Company File 1 Making a Legal Company Using Express Start 2 Making  
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Depositing Client Money into the Client Trust Account 2 Entering Bills to Pay from the Trust Account 3 Recording Bills for Office Expenses 4 Paying Bills from the Client Trust Account 5 Using a Client Trust Credit Card 6 Time Tracking and Invoicing for Legal Professionals 7 Paying the Law Firm s Invoices Using the Client Funds 8 Refunding Unused Client Trust Account Funds 9 Escheated Trust Funds Trust Account Reporting 1 Creating a Trust Account Liability Proof Report 2 Creating a Trust Liability Balances by Client Report 3 Creating a Client Ledger Report 4 Creating an Account Journal Report

Microsoft Word Advanced Training Manual Richard Walters,2019-04-09 Microsoft Word Advanced Training Manual has been designed to provide examples of how to create and control Word documents All examples demonstrated in the book have been produced as Step by Step visual examples with each example explained using easy to follow skill descriptions The demonstration method in the book has been designed to provide easy to follow visual examples to support training skill development in a very visual manner Each training skill demonstrated in this book have easy to follow examples Suggestions are provided in the Introduction section in to how to use this book so purchasers get the best out of the book This book has been produced to provide all those who want to learn how to develop a thorough understanding of Microsoft Word and its uses The book is suitable for those who have limited experience in the use MS Word and who want to develop new skills

**Word 2007: The Missing Manual** Chris Grover,2006-12-21 Microsoft Word has grown considerably in power sophistication and capability over the past decade but one thing that hasn t changed since the early 90s is its user interface The simple toolbar in version 2 0 has been packed with so many features since then that few users know where to find them all Consequently more and more people are looking for insider tips that will allow them to use these advanced and often hidden features Microsoft has addressed this problem in Word 2007 by radically redesigning the user interface with a tabbed toolbar that makes every feature easy to locate and use Unfortunately Microsoft s documentation is as scant as ever so even though you will be able to find advanced features you might not know what to do with them Word 2007 The Missing Manual written specifically for this version of the software explains basics like how to create documents enter and edit text format print and fax You will will also learn how to create sophisticated page layouts insert forms and tables use graphics and create book length documents with outlines and Master Documents Coverage also includes how to share documents with other people and programs create web pages automate documents with fields and automate tasks with macros and the Visual Basic scripting language This book shows you how to do it all

**Advanced Microsoft Word 7** Nita Hewitt Rutkosky,Judy Dwyer Burnside,Joanne Marschke Arford,1997

Word for Microsoft 365 for Lawyers Training Manual Classroom in a Book TeachUcomp,2024-03-26 Complete classroom training manuals for Word for Microsoft 365 for Lawyers 395 pages and 223 individual topics Includes practice exercises and keyboard shortcuts You will learn how to perform legal reviews create citations and authorities and use legal templates In addition you ll receive our complete Word curriculum Topics Covered Getting Acquainted with Word 1 About Word 2 The Word Environment 3 The Title Bar 4 The Ribbon 5 The File Tab and

Backstage View 6 The Quick Access Toolbar 7 Touch Mode 8 The Ruler 9 The Scroll Bars 10 The Document View Buttons 11 The Zoom Slider 12 The Status Bar 13 The Mini Toolbar 14 Keyboard Shortcuts

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Printing Documents 1 Previewing and Printing Documents

Helping Yourself 1 Microsoft Search in Word 2 Using Word Help 3 Smart Lookup

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