



Process for Emailing Order Forms

The process below was created for the purpose of completing an order form digitally so it can be emailed.

Following this process will create a copy of the order form, allowing you to rename the form and keep a digital file of completed order forms (by customer name). This process also ensures that the original order form will remain blank.

- Open order form document
- In the upper left corner, select the “File” tab.
- Select “save as”.
- When the “save as” window opens, browse to the location where you would like to save the new document and enter the new document name.
 - Naming Style Example (CustomerNameOrderFormDate.doc)
 - Name Example (Smith John Order Form 03012016.doc)
- Click “Save”