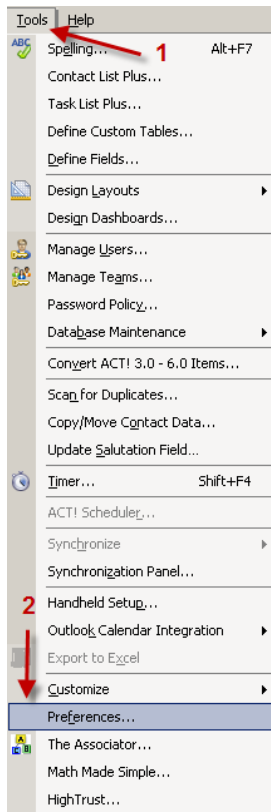


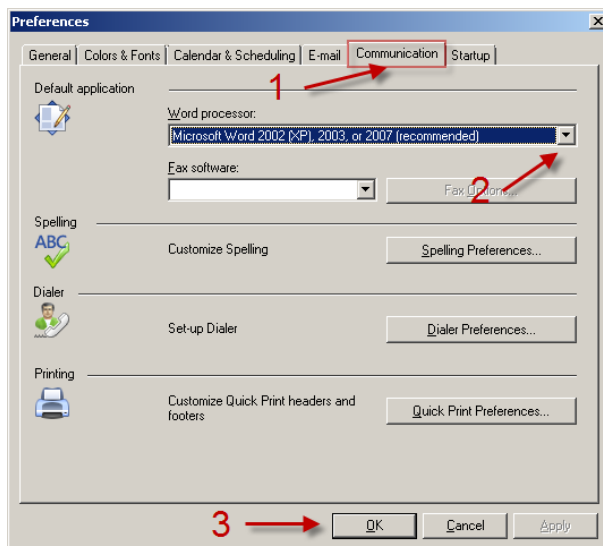
Example Template Tax Formula for Office 2003

To add a tax to template follow the below steps.

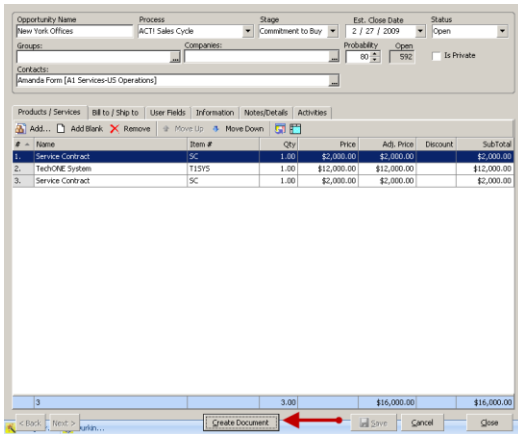
- 1) In ACT! make sure that the editor is Microsoft Word. Select Tools and then Preferences



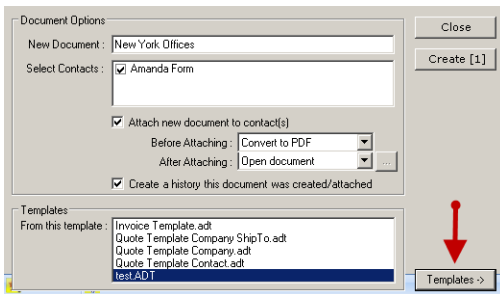
- 2) Select the Communication tab. Make sure that the word processor is Microsoft Word. Click the ok button.



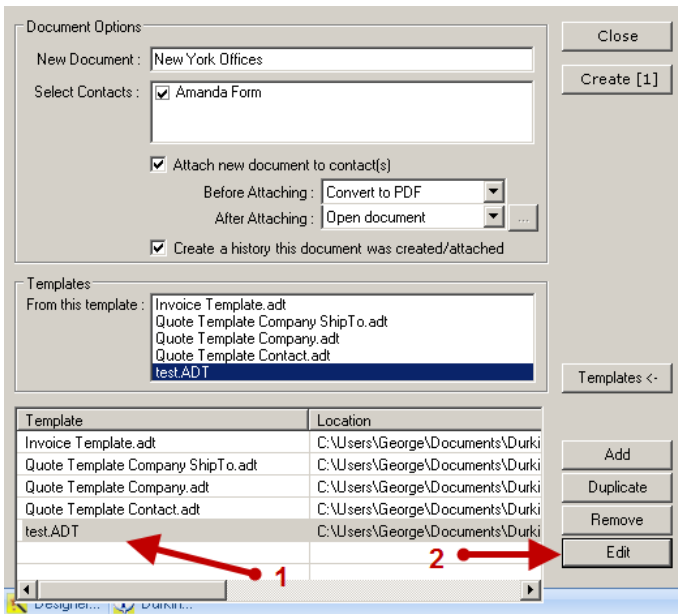
3) On the edit opportunity window press the create document button.



4) Click the templates button.

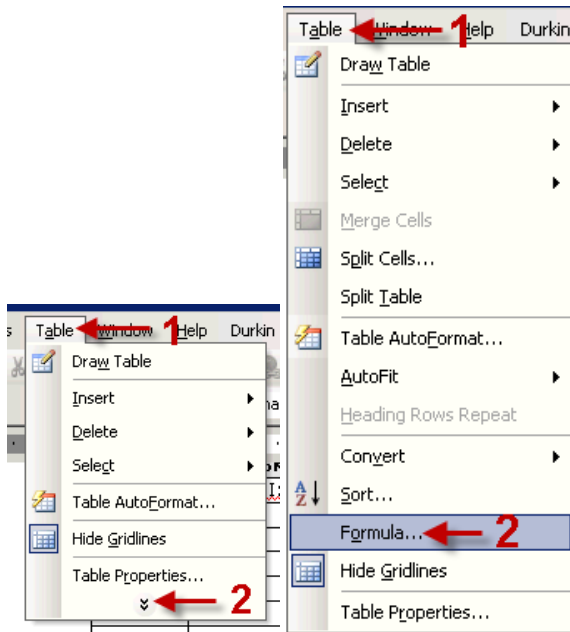


5) Select the template to be changed and click the edit button.

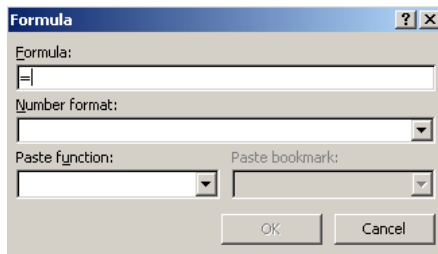


6) The word template will become visible.

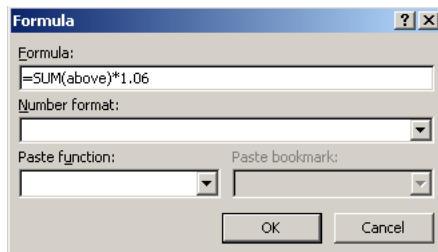
10) Click on Table > Formula, if needed click the circle with the arrows in it to get the full list.



11) This will bring up the Formula box.



12) In the formula box type in “=SUM(above)*1.06”. This will take the above cell add 6% tax and put the total in the selected cell, for a 15% tax you would use 1.15 instead.



13) The result will look like the below.

| | |
|------------------|-------------|
| Subtotal: | \$16,000.00 |
| Total: | \$16,960.00 |