Five things Word does not make obvious.

This covers both Word templates — the services document and the Statement of Work. They are built the same way, so everything below is true of either. The templates do the formatting for you: type under a heading and it comes out right.

THE FIVE

01 The contents list is a field, not text

It builds itself from the headings. Right-click it and choose Update Field, or select it and press F9. Do that once at the end, after the document is written — it picks up whatever headings exist at that moment. Delete a section and update again; it corrects itself.

02 Use the headings, and the navigation comes free

Heading 1 to Heading 4 are in the Styles gallery on the Home ribbon. Apply them rather than making text bigger and bolder by hand. In return you get the Navigation Pane (View, then tick Navigation Pane), which lets you jump around a long document and reorder whole sections by dragging. The same structure becomes bookmarks in the PDF.

03 The client logo goes in the header

Double-click the top of the page to open the header and replace the placeholder on the left with the client's mark. Ask them for an SVG if you can — it stays sharp at any size. The Cubewise mark on the right is already there and does not need touching.

04 Take the .dotx if you want a fresh document each time

Double-clicking the .dotx opens a new untitled document with everything in place, so there is nothing to save over. The .docx is the same file for people who would rather open it and Save As. Both are in the templates folder; pick whichever matches how you work.

05 The classification is in the footer, and it is a decision

Double-click the bottom of the page to reach it. The services document starts at RESTRICTED and the Statement of Work at CONFIDENTIAL, because a SOW carries fees and terms. If what you are writing is more or less sensitive than that, move the fill to the term that applies. There are three and only three: PUBLIC, RESTRICTED, CONFIDENTIAL.

ONE CAVEAT, ABOUT THE TYPEFACE

The templates are set in Neuzeit Grotesk, the Cubewise typeface. A client who does not have it installed will see Arial instead — that substitution is declared in the file, so it is predictable and the layout holds. Nothing breaks.

If the typeface matters for a particular document, send the PDF. It carries the real font wherever it is opened, and it keeps the contents list working as bookmarks.

Questions, or something this page does not cover: the Brand Enablement Team, through the Jira service desk or aconceicao@cubewise.com.