

## **How to use templates in Excel**

There is no need to be familiar with Excel to use the Practice Management and Client Care Task Force's Tools and Templates. All of the necessary formulae for performing calculations automatically have already been inserted. You simply need to enter your details.

Follow these simple steps to use the reckoner:

- Right click on template you wish to use
- Select Save Target As (this ensures the file will open in Excel for optimum functionality and not in your internet browser)
- When prompted, save the document to your computer
- Enter your details in relevant cells