

How to install a Microsoft 365 template.

It is important Word templates are installed in the correct folder, especially if they are macro-enabled (*.dotm) templates.

If you have received a template as an email attachment follow this procedure for a quick and simple installation or refer to your software help.

Windows PC

1. right-click the attachment and choose Save As. Save the attachment to a convenient folder such as your Desktop.
2. DO NOT DOUBLE-CLICK THE ATTACHMENT.
3. in Word, click File > Open and open the saved template file. You may be prompted to enable macros and/or content and/or editing.
4. in Word, click File > Save As to display the Save As dialog but do not click the Save button yet.
5. change the Save as type to Word Document (*.docx) and then immediately back to Word Macro-Enabled Template (*.dotm). This will change the folder to the default Templates folder.
6. now click Save to save the template in the designated Templates folder.
7. to start a NEW document from the template click File > New . If the template is not visible, click the Personal tab.

Mac

1. Save the attachment to a convenient folder such as your Desktop.
2. DO NOT DOUBLE-CLICK THE ATTACHMENT.
3. in Word, click File > Open and open the saved template file. You may be prompted to enable macros and/or content and/or editing.
4. in Word, click File > Save as Template but do not click the Save button yet.
5. if the original template was a dotm macro-enabled template then change the file Format to Microsoft Word Macro-Enabled template (*.dotm).
6. now click Save to save the template in the designated Templates folder.
7. to start a NEW document from the template click File > New from Template. If the template is not visible, click the Personal tab.