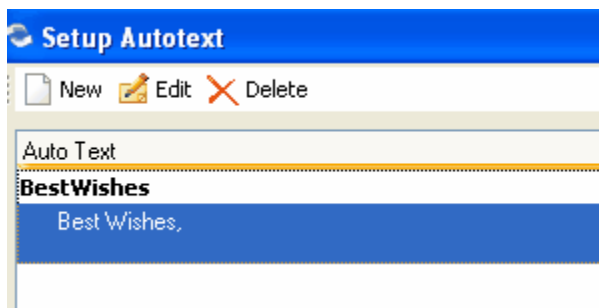


## Autotext

Autotext is frequently used text, or graphics, that has been set up by a user to enable its reuse in documents. Autotext can be plain text, that adopts the font of the text where it is inserted, or Rich Text, that keeps its own font characteristics. Rich Text Format is also used for graphics. Autotext can be for the use of only the user who created it or it can be made available to all users (recommended).

### To create Autotext:

- Click on Setup at the top of the main Forté CRM screen, then click on Autotext.



- To add new Autotext, click New.
- Type in the name of the autotext in the Autotext Keycode field. The name cannot have any spaces. As the Autotext name is case sensitive it's best to put names fully in upper or lower case so that they are easier to remember (upper case is probably best as it stands out).
- Type (or paste) in the text.
- Click Ok to save the Autotext.

### To use Autotext:

Type the name of the Autotext immediately followed by a plus sign. This will be replaced by the actual text stored in the Autotext. For example, typing STUFF+ will automatically replace that with the Autotext named STUFF. If you wish to use an Autotext marker in a document template rather than including the full text, it is suggested that you type, for example, STUFF\*. Template users can replace the \* with a + to generate the autotext when required.