

Business Documents - Business documents are formats and methods of communication. In business, many documents are used and each has a specific purpose and consists of specific components



A. RÉSUMÉ

1. **Purpose** - a brief and accurate summary of educational and work experiences **used when applying for a job**. It is often the first impression that a prospective employee makes on an employer. It may be sent as an attachment to an email
2. **Margins** – No less than .5 inches. Use white space uniformly to create a professional appearance and emphasize the content
3. **Components:**
 - a. **Identifying information** – name, address, phone number(s), email address
 - b. **Education**
 - i. Listed in chronological order beginning with the most recent
 - ii. If not graduated yet, list date of expected graduation
 - iii. Include courses enrolled that directly relate to the position sought
 - c. **Experience or Employment history** - Listed in chronological order, beginning with most recent
 - d. **References** – Listed with permission of the reference
 - e. **Optional Information**
 - i. **Objective** – A concise statement of your purpose, usually addresses a specific job
 - ii. **Activities and interests**, such as reading, skiing, hiking, Boy Scouts, choir, and fishing, etc.
 - iii. **Community service** such as volunteering at the local hospital or animal shelter, Big Brother, tutoring, etc.
 - iv. **Awards and recognitions** that indicate leadership ability, service to others, expertise
 - v. **Languages spoken** – especially applicable when applying to companies with international holdings and interests or in communities with diverse cultures
4. **Guidelines for Keying**
 - a. Contact's name is usually keyed in large font in the header section, followed by his/her contact information, usually keyed in smaller text
 - b. The sections are commonly divided into columns – headings on the left and descriptive text on the right
 - c. Limit one page as often as possible
 - d. Must be free of any errors
 - e. Format and text should be easy to read and attractively presented
 - f. Do not use a font size less than 11 or 12 pt
 - g. Never use relatives or peers as references

B. A BUSINESS LETTER

1. **Purpose** - is a form of communication used to convey a formal message to one or more parties
 - Examples of uses:
 - Company's communication to stockholders
 - Superintendent's communication to parents
 - Bank's communication to customers
2. **Margins** – Margins vary according to the amount of content
 - a. In general, adjust the margins so that the letter has a uniform amount of white space at each margin and is slightly oriented to the top or centered
 - b. Leave at least .5 inches below the letterhead
3. **Components (in order):**
 - a. **Letterhead (optional)** – preprinted information in the header and sometimes in the footer that usually contains the company name, address, email address, logo, and other contact information
 - b. **Dateline** – the date the letter is written, spelled out, such as April 30, 2010, not 4-30-2010
 - c. **Attention line (optional)** – keyed on the first line of the inside address and used to address a specific person or job (Sales Manager) within an organization
 - d. **Inside address** – the name of the addressee, name of the business, street address, city, state abbreviation, and zip
 - e. **Salutation** – the greeting, such as Dear Mr. Cox
 - f. **Subject line (optional)**
 - i. Keyed below the salutation because it is considered part of the message
 - ii. Key the word Subject in all caps, followed by a colon and the topic, also in all caps
 - iii. Used to give the reader a quick overview of the topic
 - g. **Message** – the letter content. Key paragraphs in single space format with a double space between
 - h. **complimentary close** – the goodbye, such as Sincerely
 - i. **Company signature (optional)** – the keyed name of the company in all caps, placed a double space below the complimentary close
 - j. **Writer's signature block** – the author's name and title, which may be keyed on one or two lines, depending on length
 - k. **Reference initials** – the initials of the typist of the letter and sometimes the author as well (keyed first)
 - i. Example: bc/mw or BC/MW
 - ii. No punctuation is used with the initials

- l. **Enclosure notation (optional)** – indicates that another document is included with the letter. Sometimes the enclosures are identified. Example: Enclosure: Résumé
- m. **Copy notation (optional)** – indicates the names of other parties who have received copies of the letter. Example: cc Mrs. Dian Moon

2. Punctuation styles

- a. **Mixed punctuation** (standard) means that a colon is keyed after the salutation (Dear Mrs. May:) and a comma after the complimentary close (Sincerely,)
- b. **Open punctuation** means that no punctuation is used after the salutation or the complimentary close

3. Format

- a. **In block style**, all lines begin at the left margin
- b. **In modified block style**, the date and closure are keyed at center point (usually 6 tabs)

4. Guidelines for keying

- a. A quadruple space follows the date line
- b. A double space follows the inside address
- c. A double space follows the salutation
- d. The body of the letter is single spaced, with a double space between paragraphs
- e. A double space precedes the complimentary close
- f. the writer's signature block is keyed a quadruple space below the complimentary close
- g. A double space separates the writer's signature block from any remaining parts of the letter
- h. Reference initials, enclosure notation, copy notation, etc. are single or double spaced. Reference initials are not required when the writer is also the typist

C. PERSONAL BUSINESS LETTER

1. **Purpose** - correspondence between an individual and another individual or a corporate entity
 - **Examples of use:**
 - Formal thank you note
 - Letter of complaint
 - Letter of application (Cover Letter) to accompany a résumé
 - Any communication you wish to express in a formal manner
 - representing yourself, not your company
2. **Components** - A personal business letter is formatted according to the same guidelines as a business letter AND includes the return address of the author at the top of the document

D. A MEMO

1. **Purpose** - form of communication used within an office, business, or organization, **which deals with subjects of permanent record**, such as a policy notice or a change in office procedures. Emails, on the other hand, are considered temporary communication. May be sent as a hard copy, as an email, or as an email attachment
 - **Examples of use:**
 - Communicate a hiring policy to office managers
 - Communicate a severe weather policy to employees
2. **Margins**
 - If keyed on letterhead stationery, allow .5 inches between the letterhead and the first line of the memo
 - In general, format the margins so that the memo has a uniform amount of white space at each margin and is slightly oriented to the top or centered
3. **Components:**
 - **Date**
 - May be keyed first either at center point or at the left margin
 - Spell the date out – April 30, 2010, not 4/30/2010
 - **Headings**
 - TO – addressee(s)
 - FROM – senders
 - DATE – if not keyed at the beginning
 - SUBJECT – brief summary of memo content
 - **Body** – message
 - **Writer's name and signature** (optional)
 - Used to authenticate the memo
 - OR Author may authenticate by writing his/her initials beside his/her name in the headings section
 - **Special notations** (optional) – such as attachment or copy notation
4. **Guidelines for keying**
 - The basic headings: TO or MEMO TO, FROM, and, SUBJECT or RE, are most often keyed in all caps and bold
 - The information to the right of each heading is vertically aligned (usually one or two tabs after each heading)
 - When addressed to more than two or three recipients (or from multiple authors), vertically align each name; otherwise, separate each name by a comma and fit on one line
 - Body begins a double space below the last heading
 - The writer's name or initials may be keyed a double space below the last line of the body (optional)
 - Paragraphs are single spaced with a double space between
 - Paragraphs may be blocked or indented

E. AN AGENDA

1. **Purpose** –a list of items to be discussed or acted upon, prepared before meetings, events, and conferences
 - **Examples of use**
 - Topics that will be covered at the next staff meeting
 - Topics and speakers that will present at the next board meeting
2. **Margins**
 - If the agenda is very short, it may be centered horizontally and/or vertically
 - Adjust margins (top and side) so that the agenda is attractively presented on the page
 - If letterhead stationery is used, leave .5 inches between the letterhead and the beginning of the agenda
3. **Components:**
 - **Heading section** – the organization name, date, location, and time of the meeting centered at top
 - **Body** – time slots, topics, and speakers/presenters
4. **Guidelines for keying**
 - May include columns of times, topics, speakers, and locations or may simply be represented as a list of items
 - May be formatted with dot leader tabs to control the left-to right flow of the text
 - Format varies according to the needs and preferences of each organization
 - If the agenda includes a list of incomplete sentences, no periods are required
 - Use a double space between numbered items
 - If the meeting or conference will last more than one day, list the day and date at the beginning of each section in bold
 - For agendas in column format, use the table feature

F. MINUTES

1. **Purpose** - used to describe the discussions, decisions, and actions that occurred during a business meeting
 - **Examples of use**
 - Detailed minutes from a company meeting of stockholders including the pros and cons of each discussion point
 - The minutes of the State Board of Education
 - A meeting of the PTSA Grounds Committee to decide where to plant shrubs
2. **Margins**
 - Adjust margins (top and side) so that the document is attractively presented on the page
 - If letterhead stationery is used, leave .5 inches between the letterhead and the beginning of the document
3. **Components:**
 - **Heading information**
 - **Name of organization** or committee

- **Type of meeting**, for example Regular Board Meeting
 - **Date and time** of meeting
 - **Location** of the meeting
 - **Call to Order** – formal declaration by the chairperson of the meeting that it has officially begun
 - **Approval of Minutes** – review of previous minutes by board members
 - Minutes may be emailed to board members prior to meeting to save time
 - Recommended edits and corrections are made during the approval of the minutes
 - **Committee Reports** – progress reports presented by sub-committee chairs
 - **Old Business** – unresolved discussions from a previous meeting
 - **New Business** – new topics and issues
 - **Adjournment** – notation of who adjourned the meeting
 - **Signature line** for recording secretary
4. **Guidelines for keying**
- Center the heading information and key in initial caps and bold at the beginning of the document
 - The body of the minutes should contain a separate paragraph for each subject
 - Single space within paragraphs and double space between

G. RESEARCH REPORT

1. **Purpose** - a multi-page document that usually contains several sub-topics of information related to one main topic
 - **Example of use:**
 - A marketing research report summarizing the supply and demand statistics for a new product
1. **Margins** – All margins should be set to one inch
2. **Components**
 - a. **Title page (optional)** – includes the, the name of the document, writer’s name, teacher/professor’s name (optional), and date of publication
 - b. **Title – (required)** – the identifying information keyed in the top left margin of the report
 - c. **Header** –writer’s last name and the page number
 - d. **Body** – the content
 - e. **Parenthetical citations** –reference note keyed in the body of the report
 - f. **Endnotes/Footnotes** – another type of reference format used in reports, but recommended **for use only when necessary** to add commentary or clarify
 - i. Endnotes are typically used to add commentary
 - ii. References are used to cite a source
 - g. **Works Cited** – a complete listing of references cited parenthetically in the report and keyed on a separate page
 - h. **Notes** – a complete list of resources and references used to accompany endnotes and keyed on a separate page
3. **Guidelines for Keying**
 - a. Title page (optional)
 - i. Center the title in the top third portion of the page
 - ii. Double space the writer’s name and professor’s name and center the

- two lines in the middle of the page
- iii. Center the date in the bottom third portion of the page
- b. **Title** – in the upper left-hand corner of the first page, key the writer’s name, the teacher/professor’s name, the course name, and the date in double space format (Optional) – Include email address and phone number
- c. **Header** – formatted to include the writer’s last name followed by one space and the page number in the .5 inch top right margin
- i. May be omitted on the first page
 - ii. Example: Downey 1
- d. **Body**
- i. Double-space all lines
 - ii. Use a legible font size
 - iii. Leave only one space after periods or other punctuation marks
 - iv. Indent the first line of a paragraph .5” from the left margin
 - v. Use either italics or underlining for the titles of longer works and, only when absolutely necessary, providing emphasis
 - vi. Double space again after the title line and center the title of the report
 - vii. Double space between the title and the first line of the text
- e. **Parenthetical citations** – keyed immediately following a quote or referenced source in the body of a report
- i. Includes the author’s name and page number as in this example:
(Lowery 45)
 - ii. The complete reference is keyed in the works cited section of the report
- f. **Endnotes/Footnotes** – should be used only sparingly and for necessary clarifying commentary
- i. Indicated by a superscript within the report body and keyed after any punctuation in the reference to which it refers (with the exception of a dash or hyphen)
 - ii. Footnotes (notes that appear at the bottom of the page of the body of the report) should be keyed in single space, hanging indent format with a double space separating each additional footnote
 - iii. When endnotes/footnotes are used, they must be referenced separately on a notes page
- g. **Works cited** –used to accompany parenthetical citations
- i. Keyed on separate page with the same margins as the report
 - ii. Includes header (last name, page number)
 - iii. Label the page Works Cited and center the title at the top 2” margin of the page
 - iv. Keyed in hanging indent format and double spaced
 - v. Listed in alpha order by author’s last name
- h. **Notes** – list of resources and references when footnotes or endnotes are used
- i. Keyed on separate page with the same margins as the report
 - ii. Includes header (last name, page number)
 - iii. Label the page Notes and center the title at the top 2” margin of the page
 - iv. Keyed in hanging indent format and double spaced
 - v. Listed in chronological order by superscript number

I. TABLE OF CONTENTS

1. **Purpose** - used to accompany a report, document, or manuscript to list the topics and subtopics in the order in which they occur
 - Example of use:
 - Chronological listing with page numbers of contents of an accompanying research report
2. **Margins** – same as the document it accompanies
3. **Components**
 - a. Table of Contents (title)
 - b. List of topics and subtopics and their respective pages
 - c. Page number – in roman numeral style at the bottom of the page
4. **Guidelines for keying**
 - a. A table of contents may be prepared using the software’s automatic feature or manually
 - b. Center the heading Table of Contents in all caps and bold 2 inches from the top of the page. Use a double or triple space after the title
 - c. Double space all entries
 - d. The content of the table of contents is a list of each element of the report or document following the table of contents
 - e. Key each element at the left margin
 - f. Set a right dot leader tab and key the corresponding page number in the right margin
 - g. Subtopics within a topic should be indented an additional .5 spaces from the left
 - h. Include a page number in roman numeral format in the bottom center of each page
 - i. Single space multiple-line entries
 - j. Key entries in initial caps
 - k. Use a double or triple space before the appendix listing on the table of contents
 - l. Double space the items at the end of the report, such as the appendices and bibliography