Standard Letter Creation – A Guide
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Introduction

This document is intended as a quick reference guide which should be referred to when creating standard letter for use in the communications suite with CHARITease/SANCTURease.

All letters are created using Microsoft Word and stored in a central location so that they can be referred to using the communication tab in Supporter Entry.

Currently, there is no limit on the number of standard letters which can be setup and merged; the only limiting factor is the amount of disk space which is available.

It is important to remember that the standard letter will be merged and saved under a different name so that a complete history can be built up for a Supporter. This means that the folder containing the documents can become large and should be placed on a computer which has enough disk space to cope with the amount of letters you are going to send over the next few years.
Creating and saving the Letter

All letters can be created using Microsoft Word as you would create a normal letter. DO NOT leave space for the name and address to be merged into the letter as it will be inserted before the text of the letter and any space before the body of the letter.

The mailname, address and the salutation of the Supporter to whom you are writing to will be merged. When setting up the letter, only include details of the body of the letter, who it is from and any enclosures. For example:

```
I

Thank you for your recent enquiry regarding the annual report.
I enclose full details and a copy of the latest report.
If I can be of any more assistance, please do not hesitate to contact me.

Yours sincerely

Alan Owen
Managing Director
```

When saving the letter, please ensure that the name of the letter is kept to a maximum of eight characters and is stored in the central location setup on the installation of your system. Usually X:\JAC\CHARDOCS, where X is the drive letter of your central location (For single user systems, this is usually C)

The letter can contain graphics and scanned signatures.
Updating CHARITease/SANCTURease

The next step in the process is to tell the database that the letter is available for merging from the communication suite. This is performed by entering the details in the document section of the Maintain Details option from the Main Menu.

1. Return to the Main Menu of the database.
2. Choose ‘Document’ from the drop down list above the Maintain Details Button. e.g.

3. Click the Maintain Details button and the following screen will appear:

4. Push the * button to create a new entry. (The screen will go blank)
5. Enter an ID for the document.
6. Enter a description of the document.
7. Enter the full path and filename of the document as you saved it in Word. e.g. (c:\jac\chardocs\genthank)  
   DO NOT ENTER THE EXTENSION OF THE LETTER (I.E. THE .DOC BIT) JUST ENTER THE FILENAME
8. Enter the type as ‘Letter’
9. Close the form
Merging the Letter

1. Find the Supporter to whom you want to perform the merge and click the 'COMMS' tab. The following screen will be displayed:

2. Click the button to create a new entry.
3. Enter OUT in the In or Out field.
4. Enter Letter in the Type field.
5. Enter the date the letter was sent or to be sent.
6. Enter the user name of the person who is sending the letter.
7. Choose the document from the drop down list that you want to send.

8. Click the button. The database will now open Word and will merge the letter. e.g.
9. The Document will be saved with the Supporters ID number and today's date against it to create a unique file.
10. If needed, enter further details and personalise the letter.
11. Print or email the letter and close Microsoft Word.
12. The COMMS form will be updated so that you can see the history of the communication with the Supporter. e.g.

Dear Alan

Thank you for your interest in setting up a regular gift for us. I enclose details of the regular gift programme that we are currently running.

Please help us even more by Gift Aiding the donation, we can claim an extra 28p for every £1 donated.

I look forward to receiving your completed form.

Yours sincerely

Alan Owen
Fundraising Director
Viewing the Document Sent at a Later Date

The database allows you to view any communication with the Supporter at any time. To view the actual letter sent to the Supporter:

1. Click the entry in the bottom half of the COMMS form that you wish to view. The following screen will be displayed:

2. Click the button and the actual letter sent to the Supporter will be displayed. e.g.

```
M J Owen
25 The Street
Carbham
Herts HA5 1LF

12/05/2004

Dear Alan

Thank you for your interest in setting up a regular gift for us. I enclose details of the regular gift programme that we are currently running.

Please help us even more by Gift Aiding the donation, we can claim an extra 28p for every £1 donated.

I look forward to receiving your completed form.

Yours sincerely

Alan Owen
Fundraising Director
```