

Standard Letter Creation – A Guide

CHARITease JA Computer Solutions Ltd
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Version 7

Maintain Supporters Event Administration

Create Receipt Batches Print / Close Receipt Batches Print Letters From Batches
Post Regular Gifts Post Batches to Accounts Generate / Print Tax Claim
Fund Maintenance Account Code Maintenance Source Code Maintenance

Query / Reporting Enter Tasks

Account
Maintain Details
Maintain Users

You currently have
1
tasks outstanding!
View Tasks To Do

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Registered To: Demonstration Charity Users: 2

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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.

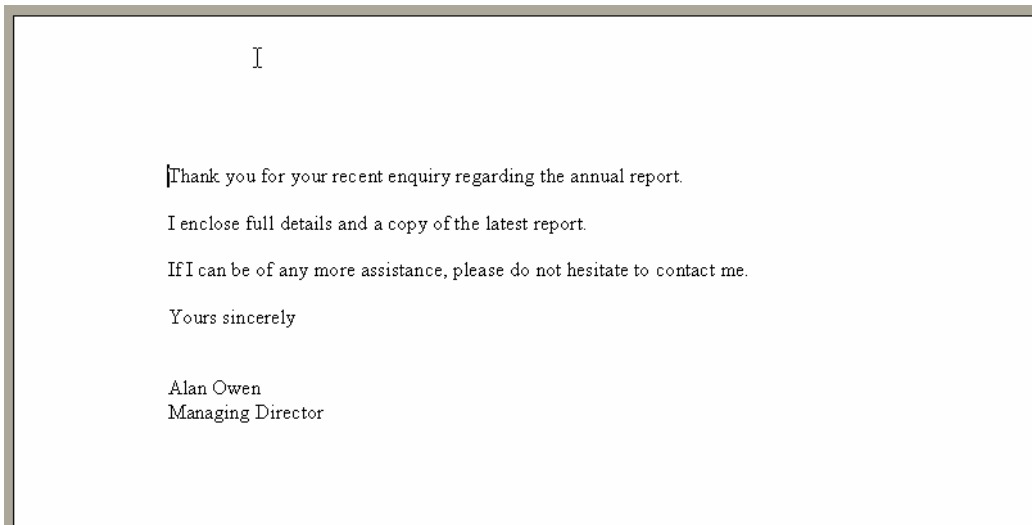
Currently, there is no limit on the number of standard letters which can be setup and merged; the only limiting factor is the amount of disk space which is available.

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:



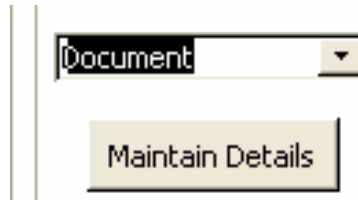
When saving the letter, please ensure that the name of the letter is kept to a maximum of eight characters and is stored in the central location setup on the installation of your system. Usually X:\JAC\CHARDOCS, where X is the drive letter of your central location (For single user systems, this is usually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

The letter can contain graphics and scanned signatures.

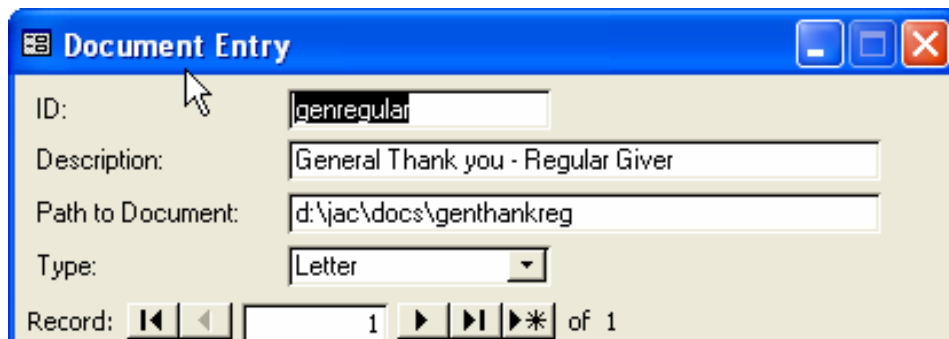
Updating CHARITease/SANCTURease


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:

A screenshot of a software window titled 'Document Entry'. The window has a blue title bar with standard Windows window controls (minimize, maximize, close). The main area contains several input fields: 'ID:' with the text 'genregular', 'Description:' with 'General Thank you - Regular Giver', 'Path to Document:' with 'd:\jac\docs\genthankreg', and 'Type:' with a dropdown menu showing 'Letter'. At the bottom, there is a 'Record:' field with navigation buttons (back, forward, search) and the text '1 of 1'.

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:

The screenshot shows a software window titled "Supporter Entry : Form" with a blue title bar and standard Windows window controls. The window has a menu bar with tabs: Supporter, Further, Contact, Comms, Appt, Receipts, Mailings, Memb, Reg Gifts, Other Dets, Family, Trust, Events, and Volunteer. The "Comms" tab is active. The form contains the following fields and controls:

- In or Out:** A dropdown menu set to "Out".
- Type:** A dropdown menu set to "Letter".
- Date:** A text box containing "12/05/2004".
- Who:** A dropdown menu set to "JAC".
- Document:** A dropdown menu set to "genregular".
- Document Preview:** A text box containing "General Thank you - Regular Giver".
- Record Navigation:** A set of icons for navigating between records, with a text box showing "2" and "of 2".
- Table:** A table with columns for "In or Out", "Email", and "Who". The first row contains "Out", "Email", and "JAC".
- Metadata:** Fields for "Date Created" (20/11/2003), "Date Updated" (12/05/2004), "Updated By" (Admin), "ID" (2532), and "Mailname" (Mr A J Owen BSC).
- Bottom Record Navigation:** A set of icons for navigating between records, with a text box showing "1" and "of 3770".

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.

Mr A J Owen BSC
 23 The Street
 Cheltenham
 Hertfordshire
 GL54 3LQ
 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

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.

Supporter Entry : Form

Supporter Further Contact Comms Appt Receipts Mailings Memb Reg Gifts Other Dets Family Trust Events Volunteer

In or Out: Type:

Date: Who:

Subject:

Body:

Record: of 2

12/05/2004	Out	Letter	JAC	"d:\jac\docs\genthankreg2532120504.doc"
	Out	Email	JAC	

Date Created: Date Updated: Updated By:

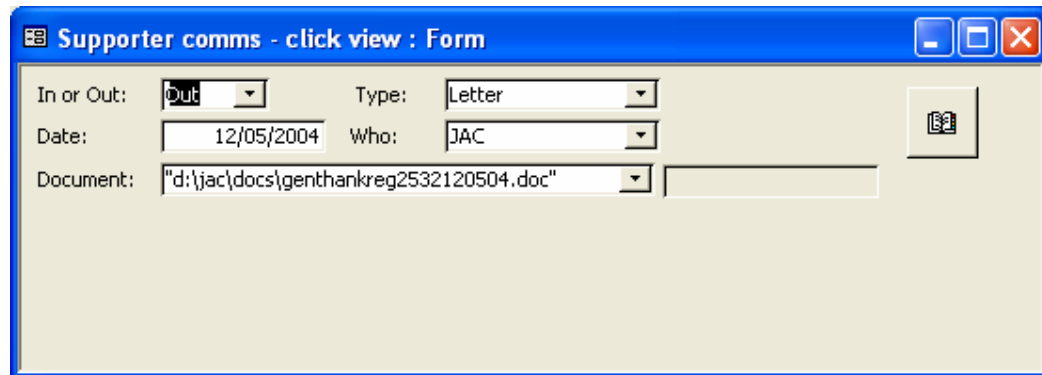
ID: Mailname:


Record: of 3770

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.



Mr A J Owen BSC
23 The Street
Cheltenham
Hertfordshire
GL54 3LQ

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