



Training Course: Communication (Letters)



Agenda



- **Overview of the Communication Tools**
- **Overview of Letters**
- **How to use the Letter Templates**
 - Keeping track of sent Letters
- **Create your OWN Letter Template**
 - Letter Overview
 - The Letter Toolbar
 - Adding Fields from the Database to your Letter
 - Adding a Signature
 - Saving the Letter for your Public or Personal use
- **Letter Merge**
- **Questions & Answers**

Overview of the Communication Tools of WiredContact



- **The WiredContact system provides a vast methods of communicating with your customers.**
 - Letters – Standard and Your Own Formats
 - E-mails – Standard and Your Own Formats
 - Letter Merges
 - Broadcast E-mails
 - Complete History of all communications which are sent out.
 - Today's conversation will focus on the Letter process

Overview of Letters





- The letter processing is one of the TABS of the Contact Record.
 1. The first step is to locate the Customer you would like to send a letter to.
 2. Click on the Letter TAB **Letters** found on the bottom of the screen.

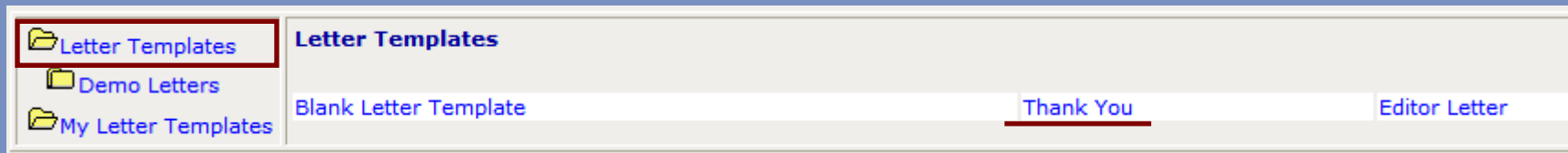
<ul style="list-style-type: none">Letter TemplatesDemo LettersMy Letter Templates	Letter Templates Blank Letter Template Thank You Editor Letter	Created by your system administrator
<ul style="list-style-type: none">Letter Templates<u>Demo Letters</u>My Letter Templates	Letter Templates\Demo Letters\ Consulting Letter Envelope Fax Cover Sample Lease Contract Mail Merge Example Simple Mail Merge Example Mail Merge Postcard Postcard Thank You	Created by WiredContact - Demos
<ul style="list-style-type: none">Letter TemplatesDemo Letters<u>My Letter Templates</u>	Letter Templates Reference Thank You Template	Created by YOU

How to use the Letter Templates



- **Writing a Letter for a Customer**

1. Locate the Customer by using the Lookup or Query screen and open the Contact record by clicking on the 
2. Click on the Letter TAB 
3. Select on the of Letter Folders - Letter Template, Demo Letters or My Letter Templates (Using the Letter Template for this demo)
4. Select one of the Letter Templates by clicking on the name (using Thank YOU for this demo)




5. The Letter template will open

How to use the Letter Templates



6. Using the Letter Template

Send Letter to : Ambulance Speedtest, Inc.

 WiredContact Worldwide, Inc.
630 W. Germantown Pike, Suite 180
Plymouth Meeting, PA 19462
888.433.2891
www.wiredcontact.com

3/4/2009

Ambulance Speedtest, Inc.
2334 Nicholson Dr.
Beverly Hills, CA 90210

Dear :

It was a pleasure meeting with all of you today. It sounds like WiredContact is an ideal solution to help your team work more closely together and share information remotely - in real-time. As you witnessed, WiredContact has similar functionality to ACT! with easy navigation, allowing users to get up and running quickly.

Please feel free to test drive WiredContact with our Interactive Demo at www.wiredcontact.com.

Regards,

Gail Stevens
General Manager

Your Company Logo will automatically default here

Current Date & Customer Address will automatically default

Content of the Letter defaults

Your signature defaults

While the template defaults, this template will work exactly like a word processor. You can make changes, additions or deletions until you are satisfied with the end result.

Edit Mode
Make any changes (if needed), select how to save this document, and then click the "Press to Prepare" button.

Subject:
Thank You Letter

Attach as:
Thankyou.html

Record as Letter Sent
Record Letter in History
Record Letter as attachment

Press to Prepare

How to use the Letter Templates



7. Letter is ready to be Printed.


- Review and Complete the **Edit Mode** Box
 - Subject
 - Attach as
 - Determine How to TRACK the Letter
 - » Record as letter sent
 - » Record letter in History
 - » Record Letter as attachment
- Press the **Press to Prepare** button
- The Letter will now display EXACTLY like it will print. If you would like to make a change BEFORE printing the letter, press the back arrow button and you will be back in the EDIT MODE

A screenshot of a software dialog box titled "Edit Mode". The dialog box has a blue header bar with a close button (X) in the top right corner. Below the header, there is a block of text: "Make any changes (if needed), select how to save this document, and then click the 'Press to Prepare' button." Below this text is a horizontal line. Underneath the line, there are two text input fields. The first is labeled "Subject:" and contains the text "Thank You Letter". The second is labeled "Attach as:" and contains the text "Thankyou.html". Below these fields are three radio button options: "Record as Letter Sent" (which is selected), "Record Letter in History", and "Record Letter as attachment". At the bottom of the dialog box is a button labeled "Press to Prepare".

How to use the Letter Templates



- Letter is now ready to be PRINTED. In the **Prepared** Box, press the **Print** button. Your print window will appear. Select a printer and press PRINT.

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Please feel free to test drive WiredContact with our Interactive Demo at www.wiredcontact.com. Regards,

Gail Stevens
General Manager

Prepared

Your letter is now ready to be printed. After printing has completed, please close this window.

Print...

Print

General Options

Select Printer

- Add Printer
- Dell Photo AIO Printer 962
- Dell Printer Fax Tools
- Fax
- hp deskjet 940c
- Intuit Internal Printer

Status: Ready Print to file **Preferences**

Location: **Find Printer...**

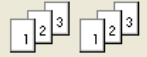
Comment:

Page Range

All Selection Current Page

Pages: 1

Number of copies: 1

Collate 

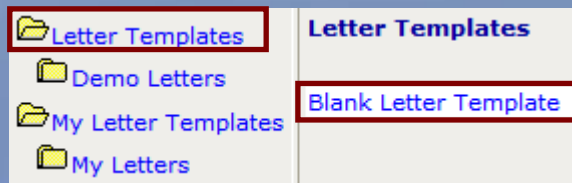
Enter either a single page number or a single page range. For example, 5-12

Print **Cancel** **Apply**

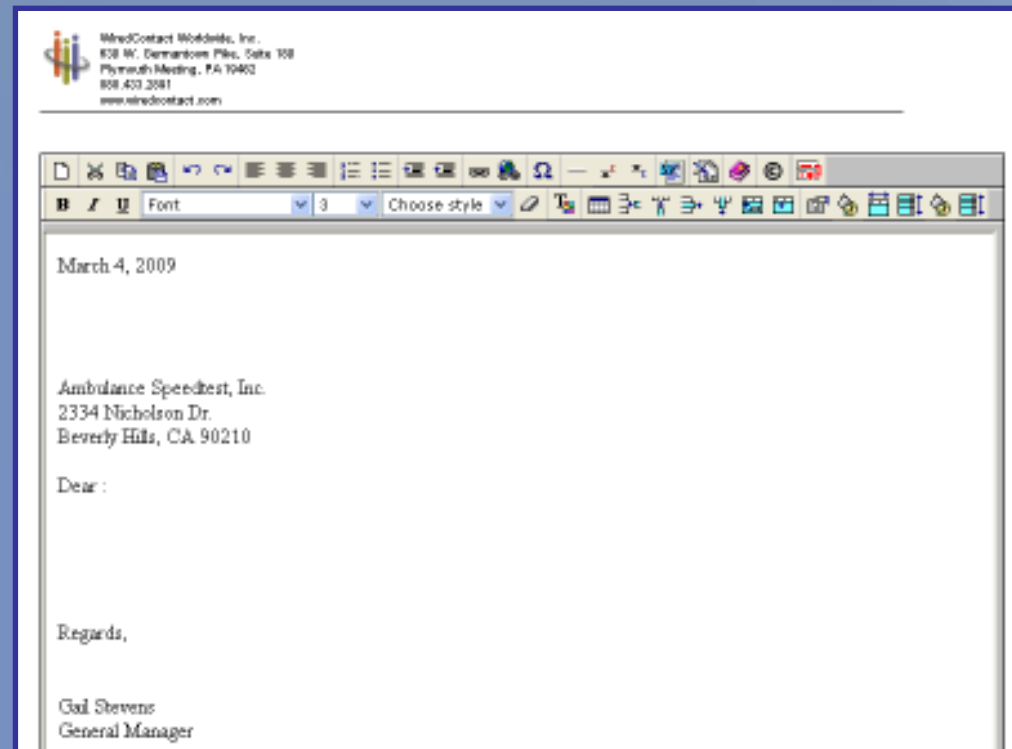
Create your Own Letter Template



1. Open any Customer contact record and click on the Letter TAB **Letters**
2. Select the Letter Templates and click on the Blank Letter Template and the following template will display



You can start to create the letter. There are 2 lines of toolbar functions to aid with the formatting of the letter.



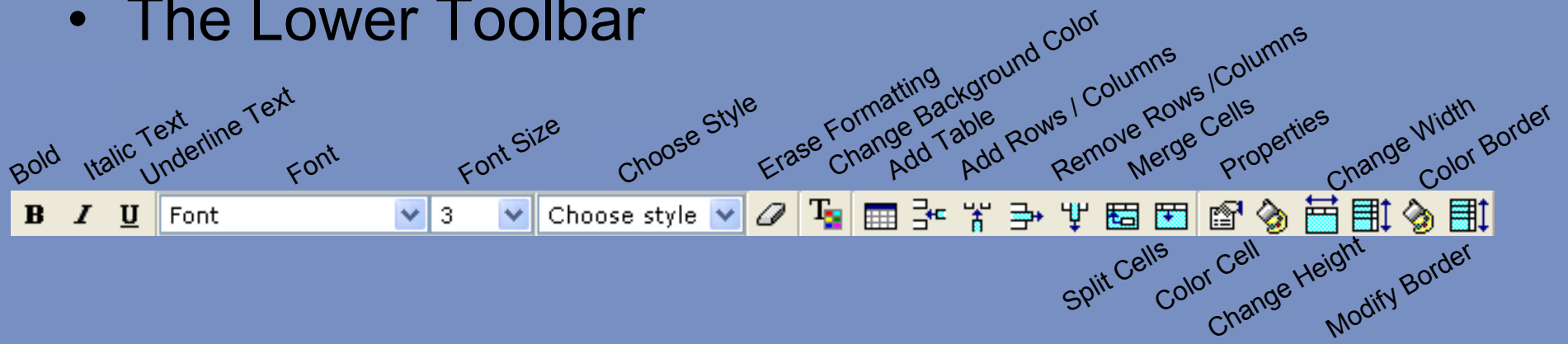
Create your Own Letter Template



- The Upper Toolbar







- The Lower Toolbar



Create your Own Letter Template



3. Start by pressing the merge field button , this will display 2 additional icons   Cancel Template & Save Template. Type and format your letter.
4. If you would like to add a Field from the database, click on the merge field button. 
5. Select the field you want to insert into your letter and click on the **Insert Merge Field** button. If you want to add another field, locate the field and again press **Insert Merge Field**. This can be repeated as many times as you need. Once done inserting fields, press **Close Window**

If you check the Userfields box, you will pull information from your MY RECORD screen. If this box isn't checked you are pulling information from your Contact screen.

The screenshot shows a dialog box titled "Insert Merge Fields". On the left, there is a list of fields with scroll arrows at the top and bottom: 2nd Contact, 2nd Last Reach, 2nd Phone Ext., 2nd Phone, 2nd Title, 3rd Contact, 3rd Last Reach, 3rd Phone Ext., 3rd Phone, 3rd Title, Address 2, Address 3, Address, Affiliations, and Agent. On the right side, there is a button labeled "Insert Merge Field" and a checkbox labeled "Userfields:" which is currently unchecked. At the bottom right of the dialog box is a button labeled "Close Window".

Create your Own Letter Template




6. You can also add modify a signature on the letter template

Regards,

Gail Stevens
General Manager

The easiest method it to type
the signature change directly
on the template

7. When you are ready to save the template, press the Save button found on the Tool Bar . The following screen will appear

The screenshot shows a standard Windows-style 'Save to' dialog box. It has a light beige background and a blue border. The text is as follows:

Save to:
My Letter Templates\

Select a folder below:
My Letter Templates

New Folder: [text input field]
Save As: Demo Template Name.htm
Display Name: Blank Letter Template

cancel Save

Saving a Letter as Personal/Public




- Saving to your Personal File [My Letter Templates] – Only you can use this template.

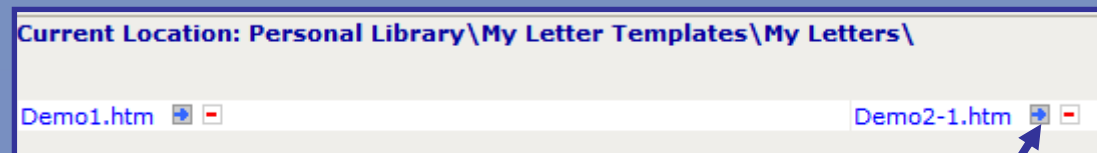
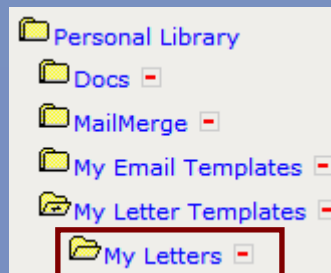
A screenshot of a 'Save to' dialog box. The dialog box has a light gray background and a blue border. It contains the following elements: 'Save to: My Letter Templates\'', 'Select a folder below:' with a folder icon and 'My Letter Templates', 'New Folder:' with an empty text input field, 'Save As:' with a text input field containing 'Demo Template Name.htm', 'Display Name:' with a text input field containing 'Blank Letter Template', and two buttons at the bottom: 'cancel' and 'Save'.

1. **New Folder** – If you would like a sub folder under the My Letter Template, enter the sub folder name here.
2. **Save As** – This is the internal file name. I would recommend to keep it the same as the Display Name. It MUST end in .htm
3. **Display Name** - This is the name that you will see on the Letter Template screen and will select when you want to use the template in the future.

Saving a Letter as Personal/Public



- **Saving the Letter as a Public template** (everyone can use this template) – You must have the security to perform this function, else speak to your system administrator.
 1. Save your Letter under your Personal Directory (as we just discussed)
 2. Navigate to the Library 
 3. Locate the letter under your Personal Directory (for this example we will be moving the Demo2 letter template to the Public directory).



4. Click on the blue arrow to the right of the template name
(move file to)

Saving a Letter as Personal/Public



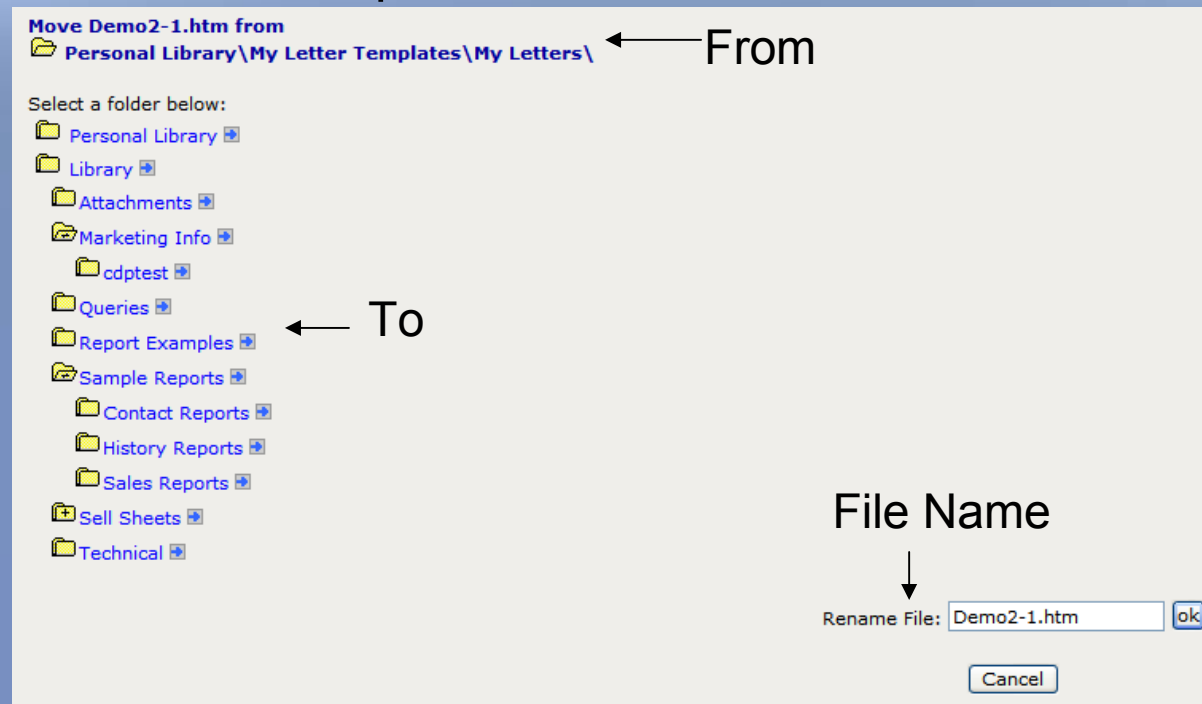
- The following screen will appear. Click on the Library to open the other folders under the Library (Public folders/files)



Saving a Letter as Personal/Public




- Now the screen will display the Public folders. Locate where you want this template to live and press the blue arrow.



Letter Merge





- **WiredContact provides the ability to send the same letter to multiple contacts. These contacts can be from a Group, Lookup or Query**
 1. If using a Lookup or Query, first perform the lookup or query and validate that all in the Results are the contacts that you want to receive the letter.
 2. Go to a Contact record and select the Letter TAB
 3. Locate the letter that you want to send out and click on the letter template.
 4. In the top left-hand corner of the screen click on the Send to Multiple Recipients icon  and select one of the options. The letter will be created for all contacts.

Send Letter to Lookup or Group

Current Lookup

Current Query

Select Group  

Questions & Answers



WIREDCONTACT