

## Creating a Letter

This tutorial shows you how to create a letter in the Sales Correspondence application.

## **This tutorial will show you how to:**

Create a sales letter from a variety of templates.

Add your own logo & a contact to that letter.

And how to export and print the letter when finished.

**Dashboard** **Create the Message** **Click 'Create the Message' to begin.**

DASHBOARD

Scheduled Messages Last 10 used Templates

Email Status:  Waiting  Completed

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**Scheduled One-Time Email Messages**  
No scheduled One-Time Emails Found.

---

**Scheduled Campaigns**

Campaign Name	Delivery Type	Created On	
Widget	Scheduled	2/5/2010 2:18:44 PM	<a href="#">Edit Campaign</a>
Test	Scheduled	2/10/2010 10:36:27 AM	<a href="#">Edit Campaign</a>

**CREATE**  
a new campaign

+ **AUTOMATED**

+ **SCHEDULED**

**Download our tips**

- 20 Tips on E-mail Etiquette
- Check List for eMail Construction
- Check List for Business Letters
- Common Mistakes

**Helpful Resources**

- Links to Useful Sites
- Articles on Effective Sales and Marketing

**Browse Templates**

- HTML Shells

To begin, select the 'Create the Message' tab as pictured here.

Dashboard

Create the Message

Manage Campaigns

Track

MESSAGE TYPE

Please select the type of new message.

1. With "PRINTED DOCUMENT" type selected, you will be able to print the generated message as PDF file.
2. With "ELECTRONIC DOCUMENT" type selected, you will be able to email the generated message.

**PRINTED DOCUMENT**

Choose 'Printed Document' to create a letter.

Then select 'Printed Document' to create a letter.

Dashboard Create the Message Manage Campaigns Track

Create New Template

Legend  
-Preview -Build Document -Delete

### 1. TEXT TEMPLATE

view a list of available templates by selecting a Document category and/or sub-category.

**Categories:**

- Announcements
- Appointments - Setting / Follow
- Contracts
- Fulfillment
- Industry Specific Examples
- Problem Resolution
- Proposals / Orders
- Solicitation / Existing Customer
- Solicitation / Prospecting

**Sub-Categories:**

- Change in Operating Hours
- Change in Product Configuratio
- Discontinue Product or Service

Global Templates My Templates

Choose a Sub-Category.

You may create your own template by selecting 'Create New Template' or create a letter based on a variety of template language already created.

First choose a category that best fits the message of your intended letter.

Second, choose a sub-category that helps you even further.

Create New Template

Legend  
-Preview -Build Document -Delete

### 1. TEXT TEMPLATE

view a list of available templates by selecting a Document category and/or sub-category.

Categories:

- Announcements
- Appointments - Setting / Follow
- Contracts
- Fulfillment
- Industry Specific Examples
- Problem Resolution
- Proposals / Orders
- Solicitation / Existing Customer
- Solicitation / Prospecting

Sub-Categories:

- Discontinue Product or Service

Global Templates My Templates

Sample Name
Change in Product Name

Select to preview.

Select to build.

Then you may preview a particular template, or build a letter from a specific template by selecting the 'Build Document' icon as shown above.

### Template Name: Test Sales Document

[Edit Template](#)[Clear Entry Data](#)

Please enter data for all the replacement fields defined in your selected template.

Replacement Fields	Data	Description
Company Name	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	Name of the Company to be
Company Street Address	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	Street Address as it will appear in the letterhead or contact information.
Company City	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	City Name as it will appear in the letterhead or contact information.
Company State	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	State Name as it will appear in the letterhead or contact information.
Company Zip	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	Zip Code as it will appear in the letterhead or contact information.
Document Date	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	Date spelled out as it should appear at the top of the correspondence, e.g. May 15, 2008.

[Back to Document List](#)[Next](#)

A set of replacement fields will then appear.

### Template Name: Request for Clarification of Start Time

[[173\_Company Name]]  
[[174\_Company Street Address]]  
[[177\_Company City]], [[178\_Company State or Province]], [[179\_Company Postal Code]]  
[[180\_Document Date]]  
[[181\_Addressee Formal Name ]]  
[[182\_Addressee Company Name]]  
[[183\_Addressee Street Address]]  
[[184\_Addressee City]], [[185\_Addressee State or Province]] [[186\_Addressee Postal Code]]

Dear [[197\_Name by Which you Call Customer or Prospect]],

I appreciate hearing from you this morning about the proposed time tables. I realize there was some confusion from our end as to when production is actually scheduled to begin. Our production schedule allows for transition of the production line between customers. The timeline between customers varies based on the time needed to gather resources for production.

As of right now, the time it will take to prepare for production depends on when you accept and sign the contract. Accepting the contract immediately can assure that another order does not delay the start of your production. Based on our present production schedule, we estimate that a finish date will be approximately [[216\_Duration of Production Schedule]] from the time the contract is signed and in our

[Back to Document List](#) [Save As New Template](#) [Build Document from this Template](#)

Dashboard Create the Message Manage Campaigns Track

### Template Name: Test Sales Document

Please enter data for all the replacement fields defined in your selected template. [Edit Template](#) [Clear Entry Data](#)

Replacement Fields	Data	Description
Company Name	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	Name of the Company to be included in the document
Company Street Address	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	Street Address as it will appear in the letterhead or contact information.
Company City	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	City Name as it will appear in the letterhead or contact information.
Company State	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	State Name as it will appear in the letterhead or contact information.
Company Zip	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	Zip Code as it will appear in the letterhead or contact information.
Document Date	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	Date spelled out as it should appear at the top of the correspondence, e.g. May 15, 2008.

[Back to Document List](#) [Next](#)

These replacement fields correspond to the template that you have selected. For example, if you write your company name into the 'Company Name' replacement field, it will automatically appear in your letter once you are finished.

Template Name: Test Sales Document

Edit Template Clear Entry Data

Please enter data for all the replacement fields defined in your selected template.

Replacement Fields	Data	Description
Company Name	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database Widget Inc.	Name of the Company to be included in the document.
Company Street Address	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database 1234 Tree St.	Street Address as it will appear in the letterhead or contact information.
Company City	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database Dallas	City Name as it will appear in the letterhead or contact information.
Company State	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database Texas	State Name as it will appear in the letterhead or contact information.
Company Zip	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database 76019	Zip Code as it will appear in the letterhead or contact information.
Document Date	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database March 17, 2010	Date spelled out as it should appear at the top of the correspondence, e.g. May 15, 2008.

Back to Document List

Next  Then click 'Next' to continue.

Once you have finished completing the replacement fields, you may click 'Next' to continue.

The image shows a software interface for configuring replacement fields. On the left, a table titled 'Replacement Fields' has columns for 'Data' and 'Description'. The 'Data' column has a dropdown menu open, showing a list of contact fields. A blue arrow points to this dropdown with the text 'Choose information from your Database.' Another blue arrow points to the 'Contact's first name' option in the dropdown with the text 'Select a field.' On the right, a section titled 'Additional Contacts' has a list of contact names. A blue arrow points from the 'Contact's first name' option in the dropdown to 'Beverly, Hills' in the list with the text 'Additional Contacts'. Below the list are 'Back' and 'Next' buttons.

Replacement Fields	Data	Description
Sender Company Name	<input type="radio"/> Enter Data Manually <input checked="" type="radio"/> From Database	
Address	--Select a field from Contact-- --Select a field from Contact-- Contact's first name Contact's last name Contact's Status Priority Rating Group Name Contact Source Contact Industry Legal Status Department Location Employee Position Account Executive Name Account Executive Phone Contact's Middle Name Suffix Personal Title Job Title Company Name Profession	Name of contact as it appears in the letterhead or contact information. City Name of company as it will appear in the letterhead. State or Province of Sender Company as it will appear in the letterhead. Postal Code of Sender Company as it will appear in the correspondence

**Additional Contacts**

Available Contacts  
 Contact Type: --All Contact Types--

Selected Contacts  
 Beverly, Hills

Back Next

You are also able to add a contact as well as their information to the letter by selecting a contact, and choosing what specific information you would like to include by selecting from the 'Data Base' and including that information in the replacement fields.

Add New Contact

### Contacts Groups

Available Contact Groups

- Group Name 1
- Group Name 2
- Group Name 3

Selected Contact Groups

- 



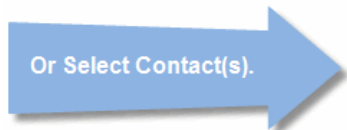
### Additional Contacts

Available Contacts

- Contact Type: --All Contact Types--
- Beverly, Hills
  - Beverly, Hills
  - Beverly, Horse
  - Beverly, Uncle
  - Bob, bobob
  - bob, finocchio
  - brad, bucher
  - Chad, Smith
  - Chad, Delta

Selected Contacts

- Beverly, Hills



Back

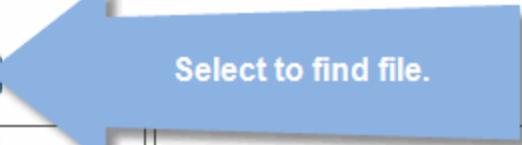
Next



After you have selected which contacts information you want to populate in the previous replacement fields selected, you may click 'Next' to continue.

Click the "Print" button above. A PDF document will be created. If you have selected contact data to use to auto-fill your document, then a single PDF will be created with a page break between each contact record.

Upload Header Image: Choose File



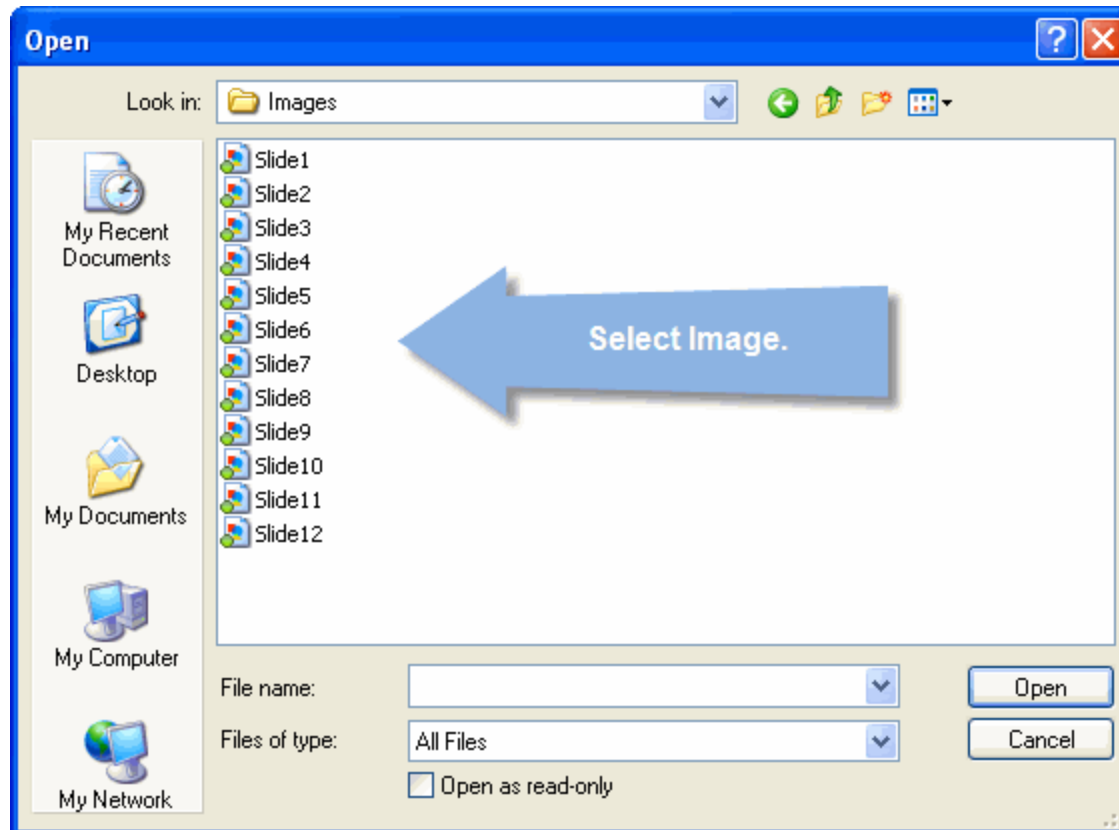
Select to find file.

Header Image on 1st page <input type="button" value="Change"/>	Header Image on following pages <input type="button" value="Change"/>
<b>Image Not Available</b>	<b>Image Not Available</b>

Print Preview

Widget World, Inc.  
3340 Peachtree Road  
Dallas, Texas 76019

Next, you may upload your logo by first selecting 'Choose File'.



Then find the file that your logo is saved as.

Dashboard Create the Message Manage Campaigns Track

Click the "Print" button above. A PDF document will be created. If you have selected contact data to use to auto-fill your document, then a single PDF will be created with a page break between each contact record.

Upload Header Image:  No file chosen

Header Image on 1st page  Header Image on following pages

**Widget Inc.** **Widget Inc.**

Print Preview

Widget World, Inc.  
3340 Peachtree Road  
Dallas, Texas 76019

March 10, 2010

Announcement to our Sales Team:

We have just been informed by our Legal council that the original name Widget One that we had wanted has already been trademarked by a competitor. Because this name has already been taken, we will change the name of the line to Widget Seven. We have been assured that this name is still available, and we are working on the trademark right now.

This change does present a challenge for our initial marketing campaign. We have already shot most of our new commercials using the Widget One name. We intend to have our agency work the new name Widget Seven into the existing commercials. We are still trying to figure out how much this will cost, and exactly how long it will take.

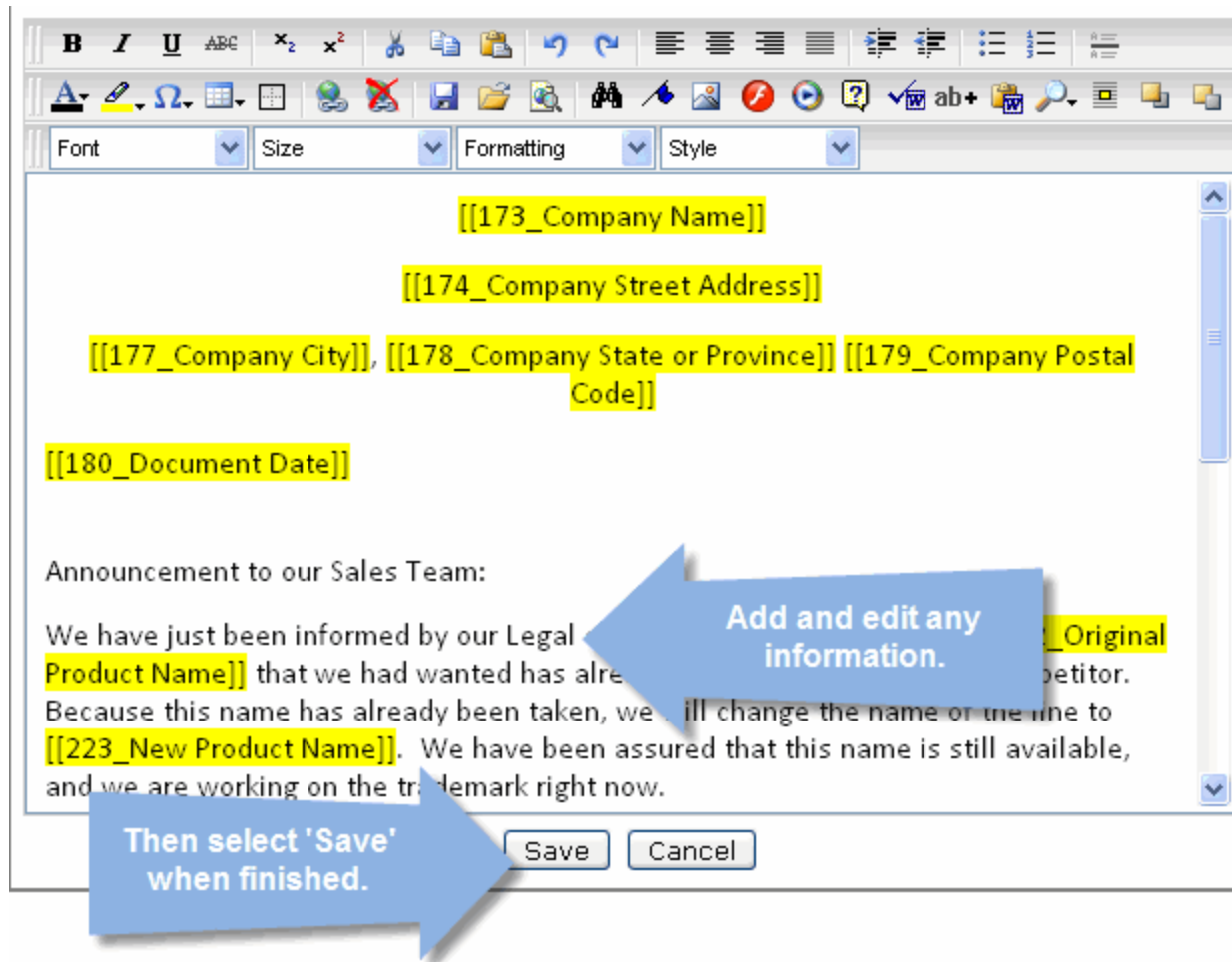
You may choose to upload the selected image.

Images will then appear.

You may edit the template by clicking here.

Once you have selected your file, click the upload button and you will have the choice to have them appear as a header and footer as displayed above.



Your letter draft will also appear on this window, and you may edit it by selecting the 'Edit Template' button.



After selecting the 'Edit Template' button this screen will then appear. Here you are able to add and edit any information that you would like to appear in the letter. Once you have completed editing, you may select 'Save' to continue.

Click the "Print" button above. A PDF document will be created. If you have selected contact data to use to auto-fill your document, then a single PDF will be created with a page break between each contact record.

Upload Header Image:  No file chosen

Header Image on 1st page <input type="button" value="Change"/> 	Header Image on following pages <input type="button" value="Change"/> 
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Print Preview

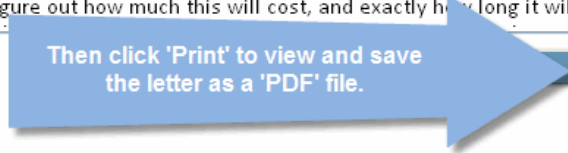
Widget World, Inc.  
3340 Peachtree Road  
Dallas, Texas 76019

March 10, 2010

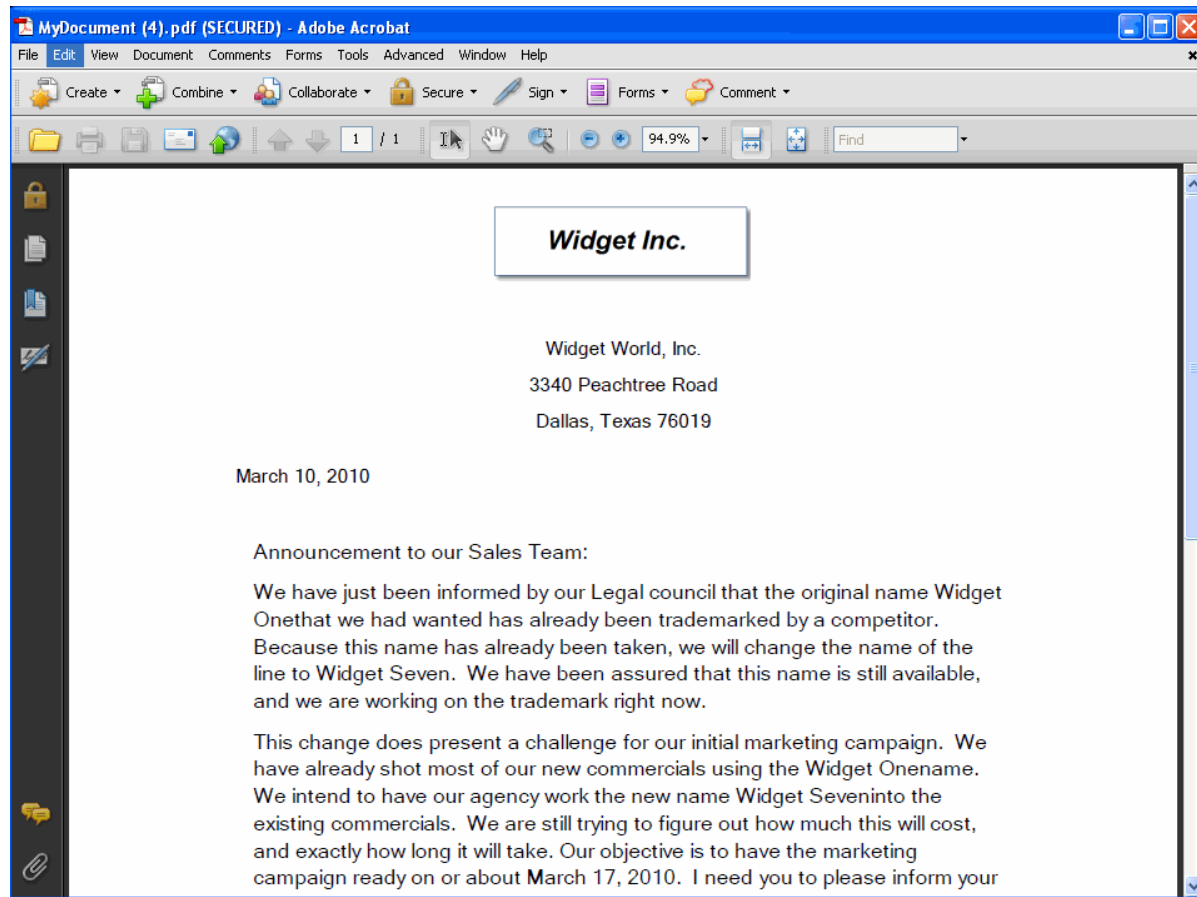
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After editing your letter, you may click 'Print' to view the letter in PDF form.



You are now able to save and print the document.