ASICOMP.COM

How Do You Use Letterwriting?

Tammy Mason - 2017-09-18 - in Reports

How Do You Use Letterwriting?

Tree View Menu: Receivable/Customer, Reporting
Graphics Menu: Customer, Extra, Letter Writing

Customer Letter Writing works a lot like a word processing program. Letter Writing is interactive with customer masters and is capable of pulling specific fields and inserting them into a letter with little data entry.

New letters may be entered, or a letter that was previously stored may be selected. Existing letters written in other Windows word processing software may be copied and pasted into this option. When adding a letter various fields from the customer master may be indicated for inserting data, specific for the letter. Once the letter is finished, there will be several sort options to determine which customers for whom the letter should be printed.

When entering letter writing, a blank page comes up or go into File and click New and start a new letter. Set margins for the letter under File, Page Setup. Make sure margins are large enough for the letterhead being used.

Click Insert or right click and click Date. That field is inserted into the letter and will pull the current date from your computer's date when the letter is printed. Enter down a few spaces and click Insert. Insert the Customer name and press Enter. Insert the Address and press Enter. Insert the City, State and Zip leaving the appropriate spaces between each and adding a comma between city and state. You can also use the Name/Full address Insert and it will enter the company name and address when you do a mail merge. Enter down a few more lines and type your Salutation and insert Salutation. The salutation comes from the Customer Master if you have entered one. Put a space between Dear and the salutation and another space before inserting either the OE/Mlg contact full name or OE/Mlg contact first name or the

OE/Mlg contact last name.

If typing a collections letter you may wish to use the A/R contact full name or the A/R contact first or last name. Enter a colon and enter a couple more lines. Type the body of the letter. In the body of the letter you can insert First order date, Last order date, Salesperson name, Salesperson #, A/R bal, A/R open records, MTD sales, YTD sales or LYR sales. Any of the fields you insert into the letter will pull the information from the Customer Master when you do a mail merge to print the letter. The letter can be merged with one customer or many customers.

Because within the window right clicking allows for the insertion of fields it is not active for deleting incorrectly inserted fields like in a normal word document. You will need to single click on the field you wish to delete and it will highlight it in light grey. Then click the ALT and DEL key at the same time to make it delete.

Some examples of letters are collection letters, order reminders using the Last order date or use LYR (last year) sales to send a letter and gift to some of your high dollar customers.

Save the letter once you finish typing it. To print the letter and send to various customers, select the mail merge option. This brings up the sort, select and print options.