Fast Class File | SmartOffice®

To customize a form letter for individual correspondence –

- Open the contact record of the individual to whom the correspondence will be sent.
- Click the **Letter Writing** button on the toolbar.
- In the **Letter Printing Options** screen, select **Create new Letter (Typewrite)** in the **Letter Printing Options** section, and the **Create Letter using existing Form Letter** option in the **Letter Creation Options** section.
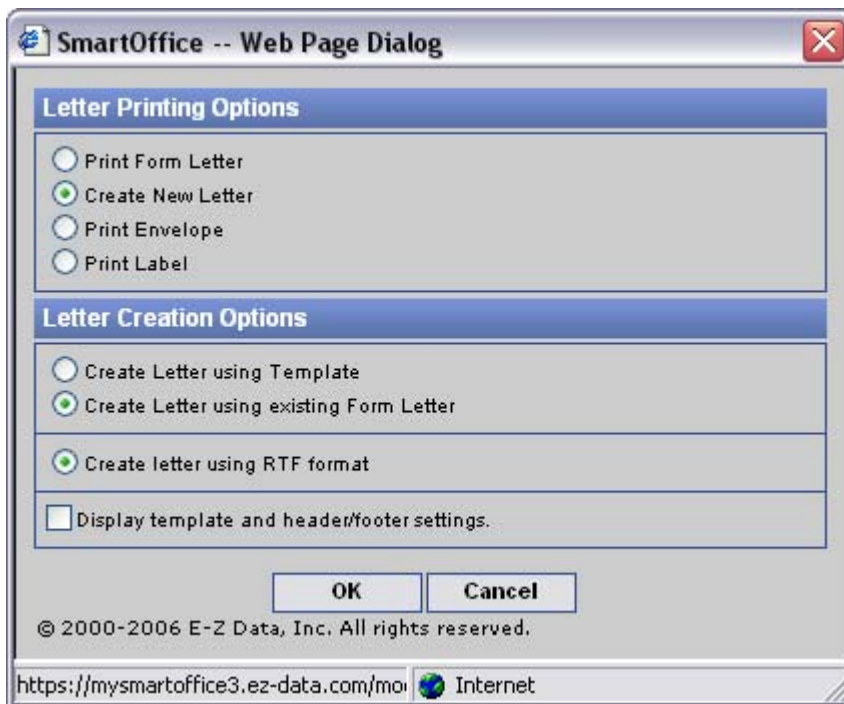

Figure 1: The Letter Printing Options screen.

- Click **OK**.
- Type the name of the selected form letter in the **Title** field of the **Search Form Letters** screen.
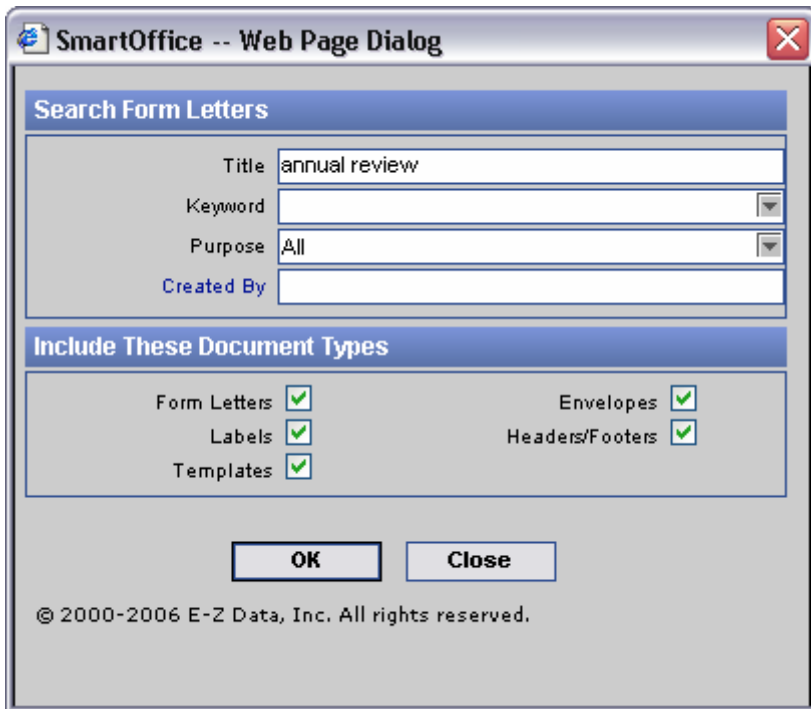
Figure 2: The Search Form Letters screen.

- Click **OK**.
- If more than one letter meets the search criteria, select the appropriate letter in the **Form Letter Summary** screen. If only one letter meets the criteria, SmartLink for Word will open the form letter.
- Use the **Expand Merge Code** button in the SmartLink for Word toolbar to expand the merge codes in the form letter.
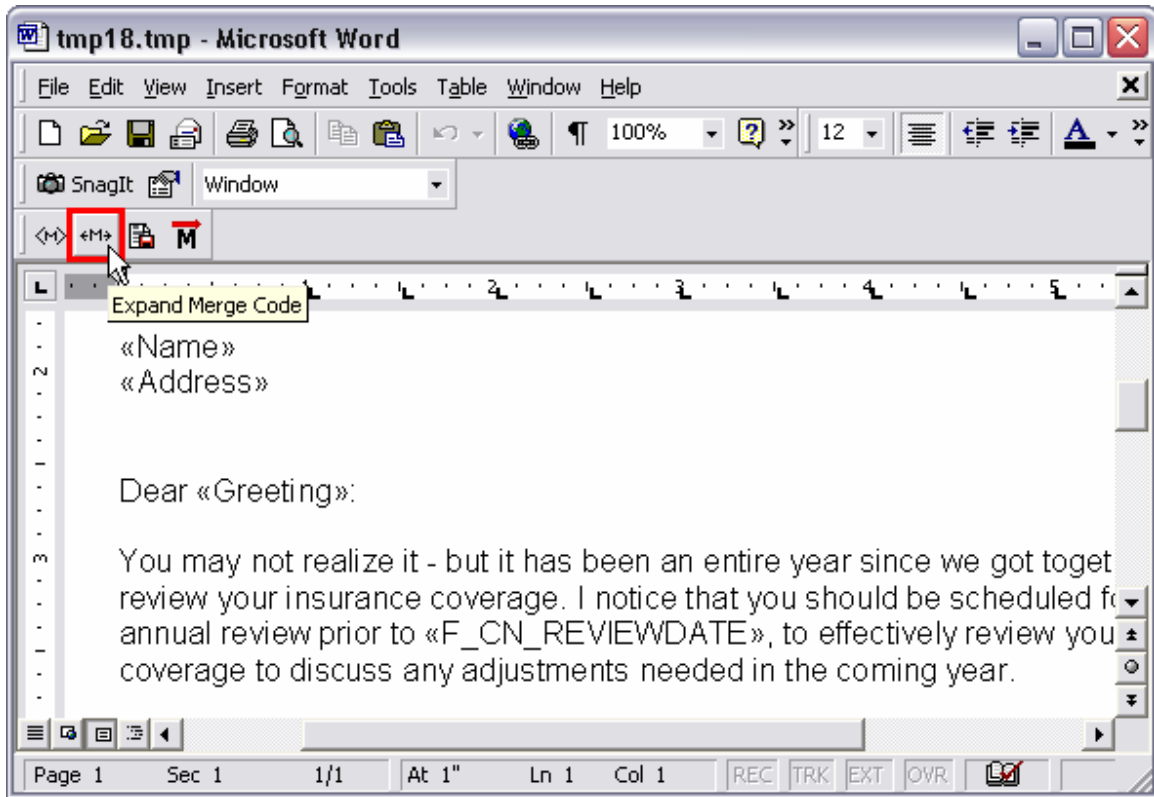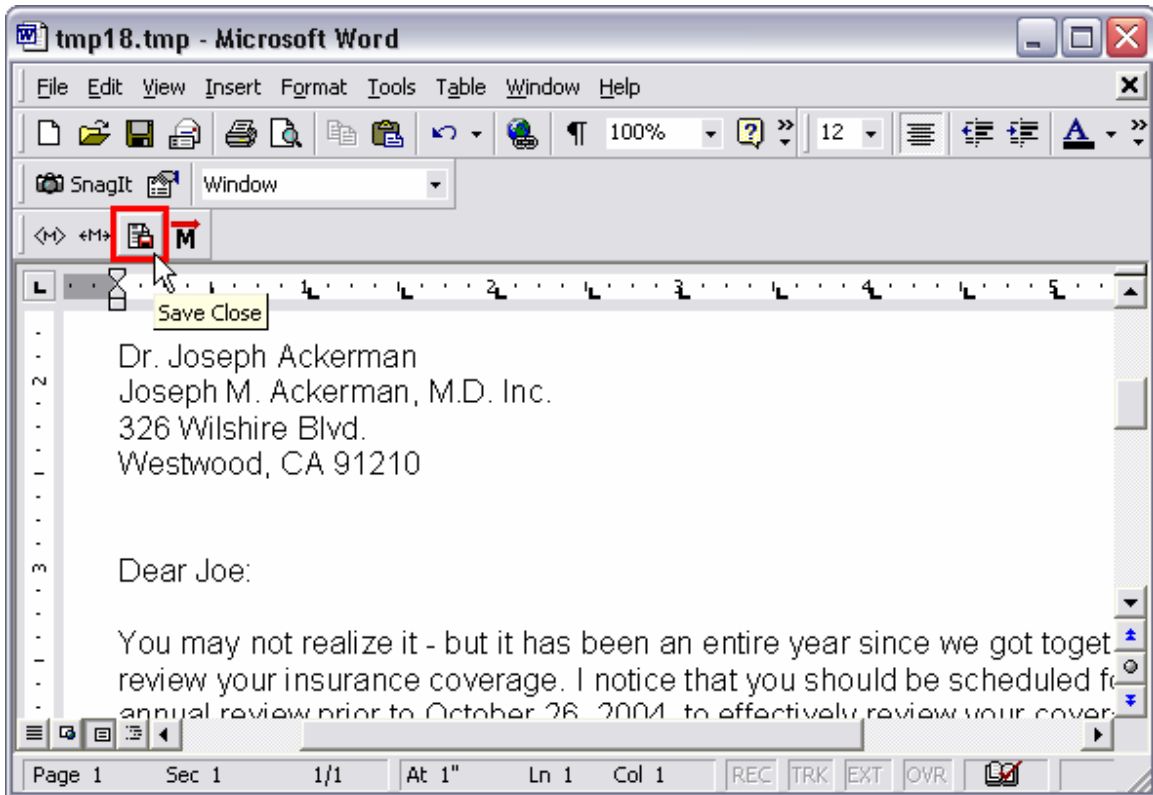
**Figure 3: The Expand Merge Code button.**

- Add custom information to and/or modify the form letter as needed.
- When finished, click the **Save and Close** button.

Figure 4: The Save and Close button.

Note: Additions and modifications made to the custom form letter will not make permanent changes to the selected form letter. The form letter will still be available in its original form to be used in mass correspondence or as a basis for future customized form letters. Additions and modifications will be saved for the customized instance of the form letter only.

- Enter the title in the **Title** field of the **SmartLink for Word** save screen.
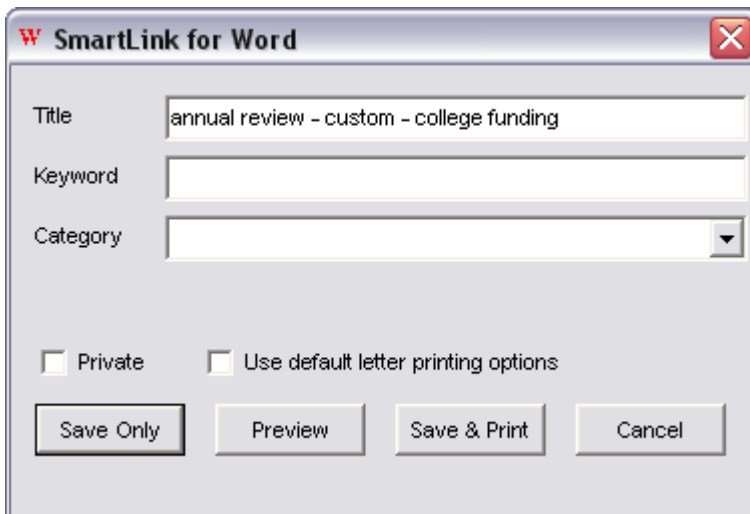
Figure 5: The SmartLink for Word save screen.

- Add keyword and category information as needed.
- Set print options as needed to send correspondence
    - To use the system default printing options – select **Print use default options** and click **Save and Print**.
    - To use different printing options, deselect **Print use default options** and click **Save and Print**. Select printing options as needed.
- The letter will be printed or sent using the selected options and a copy of the custom form letter will be available in the **Letter Log** of the selected contact.