| Volume 67: The Custom Form Letter | Phone Numbers |
|-----------------------------------|---------------|
| Fast Class File                   |               |

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.

| Letter Printing Options   |  |
|---|--|
| O Print Form Letter   |  |
| Create New Letter   |  |
| O Print Envelope  |  |
| O Print Label   |  |
| Create Letter using Template         O Create Letter using existing Form Letter |  |
| Create letter using RTF format  |  |
| Display template and header/footer settings.                                    |  |
| OK Cancel<br>2000-2006 E-Z Data, Inc. All rights reserved.                      |  |

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.



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|-------------------------------------|--|--|--|
| Search Form Letters                 |  |  |  |
| Title                               | annual review                            |  |  |
| Keyword                             | <b>V</b>                                 |  |  |
| Purpose                             | All                                      |  |  |
| Created By                          |  |  |  |
| Include These Document Types        |  |  |  |
| Form Letters<br>Labels<br>Templates | Headers/Footers                          |  |  |
| © 2000-2006 E-Z Data                | OK Close<br>a, Inc. All rights reserved. |  |  |

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.



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| E   |
| · «Name»<br>· «Address»   |
| · · ·   |
| -<br>Dear «Greeting»:   |
| You may not realize it - but it has been an entire year since we got toget<br>review your insurance coverage. I notice that you should be scheduled for<br>annual review prior to «F_CN_REVIEWDATE», to effectively review you to<br>coverage to discuss any adjustments needed in the coming year. |
|   |
| Page 1 Sec 1 1/1 At 1" Ln 1 Col 1 REC TRK EXT OVR   |

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.



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|   |
| Dr. Joseph Ackerman<br>Joseph M. Ackerman, M.D. Inc.<br>326 Wilshire Blvd.<br>Westwood, CA 91210                            |
| n Dear Joe:<br>▼  |
| 🝸 👘 You may not realize it - but it has been an entire year since we got toget 📤  |
| review your insurance coverage. I notice that you should be scheduled f   |
| <ul> <li>annual review prior to October 26, 2004, to effectively review your cover.<sup>*</sup></li> <li>■ ■ ■ ■</li> </ul> |
| Page 1 Sec 1 1/1 At 1" Ln 1 Col 1 REC TRK EXT OVR   |

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.

| 🐨 SmartLii | nk for Word                              | X |
|------------|--|---|
| Title      | annual review - custom - college funding | _ |
| Keyword    |  |   |
| Category   |  | • |
|            |  |   |
| 🗖 Private  | Use default letter printing options      |   |
| Save Only  | y Preview Save & Print Cancel            |   |
|            |  |   |

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.

