July 28, 2006

Fast•Class File

Client Data System

Volume 89: Creating a Template

The process of creating a **Template** is very similar to the process of creating a **Form Letter** in CDS. You may remember from the CDS Contact Correspondence course -- **Form Letters** are for sending letters to one or more contacts in CDS, while **Templates** are intended to be personalized for an individual contact.

As with the form letter, templates use **Merge Codes**. **Merge Codes** use data captured in CDS to add content.

Although intended for one contact, a template is not contact specific, but an **individual correspondence tool** that can be used for virtually any contact.

To create a new Template using an existing Template:

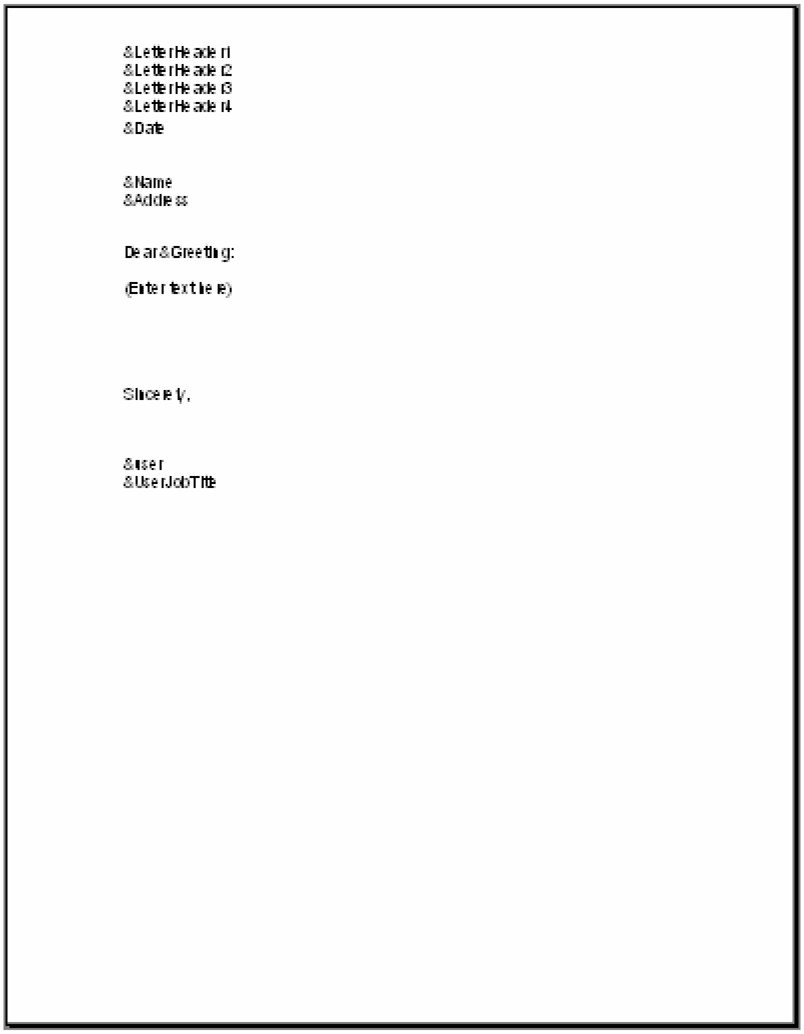
- Select **Tools** in the main menu.
- Select **Form Letter Maintenance** in the **Tools** menu.
- Type **Template** into the **Keyword field** and click **OK**.
- A summary opens with a list of templates available in CDS.
- Select **Template** from the list and click on the **Modify** button.
- Add, modify, or delete text and merge codes to the Standard Template.
- To save your new template, click **File** in the main menu.
- Select **Save As** in the **File** menu.
- Select **Form Letter** in the **Save As** menu.
- Rename the template in the **Description** field.

Note: If you're using an existing template as the basis for a new template, you'll need to be sure that you change the ***Description*** *before saving the new Template, otherwise you will overwrite the existing template.*

- Type **Template** in the **Keyword field**, so that it will appear in your summary of templates. This makes it easy to search for the template later on.

Note: E-Z Data recommends you use E-Z Editor as your word processor (instead of Microsoft Word) because E-Z Editor allows you to share templates with other users in CDS.

- Click **OK** to save.


&LetterHeader1
&LetterHeader2
&LetterHeader3
&LetterHeader4
&Date

&Name
&Address

Dear &Greeting:

(Enter text here)

Sincerely,

&User
&UserJobTitle

Figure 1: Standard Template.

To add a Merge Code:

- In an open template, position your cursor on the area you would like to add the merge code to.
- Click **Tools** in the main menu.
- Select **Merge Code Browser** in the **Tools** menu.
- Select the desired merge code from the Merge Code List and click Insert.

Note: Select merge codes from the Table/Field Names section only if you cannot find your desired merge code in the Merge Code List. The Merge Code List was designed to offer every possible merge code the average user would need.

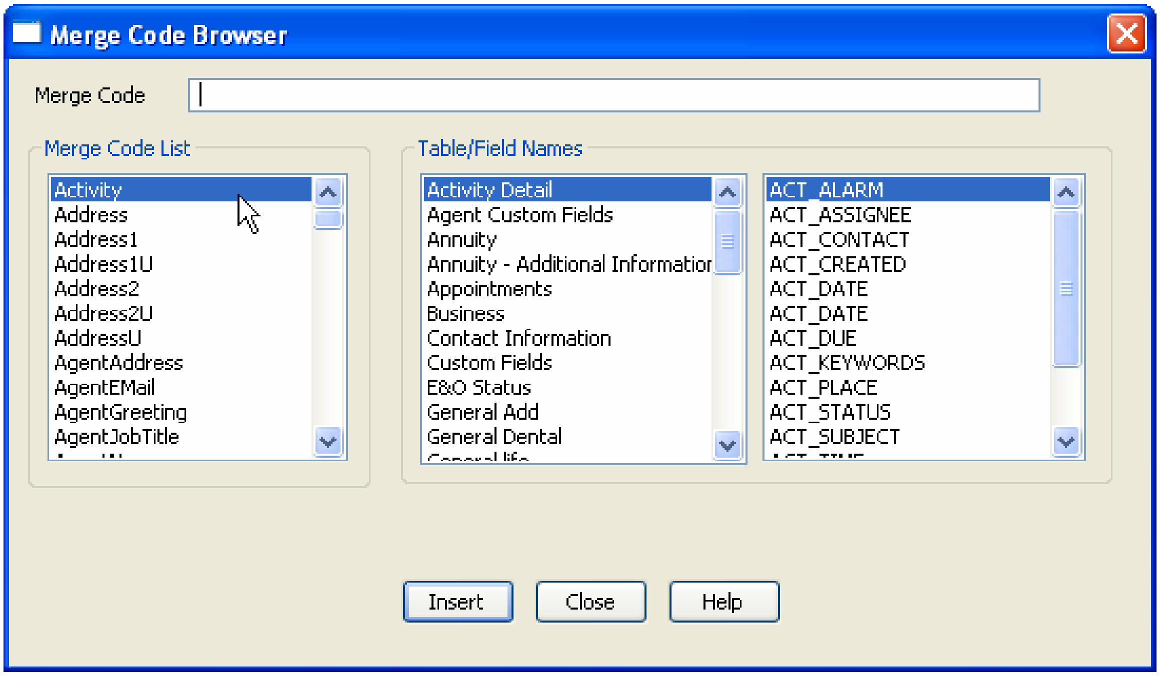


Figure 2: Merge Code Browser.

To send a letter to a Contact using your new Template:

- From an open contact record, click on the **Letters** button in the menu bar.
- Tag **Create Letter**.
- Click the **Options** button.
- Click on the **Default Letter Template drop-down**.
- From the **Default Letter Template** drop-down, select the desired template.

Important Note: The E-Z Editor option must be selected in order to use Templates created using E-Z Editor. As noted earlier, E-Z Data recommends using E-Z Editor for all of your Templates.

- Click **OK**.
- Click **OK** in the Letters window.
- From the open template, expand the **merge codes** and add your body of text. To expand the merge codes, click **Tools** in the main menu then select **Expand Merge Codes**.
- When finished with your letter, click **close**.
- Click **Yes** to save the changes.
- From the Letter Description window, **name** the letter in the **Description field**. (ex. "Thank You Letter")
- Add a **Keyword** in the **Keyword field** so it will be easy to search for the letter later on. (ex. "Thank You")
- Click **OK** to save the letter.