

# N Letters

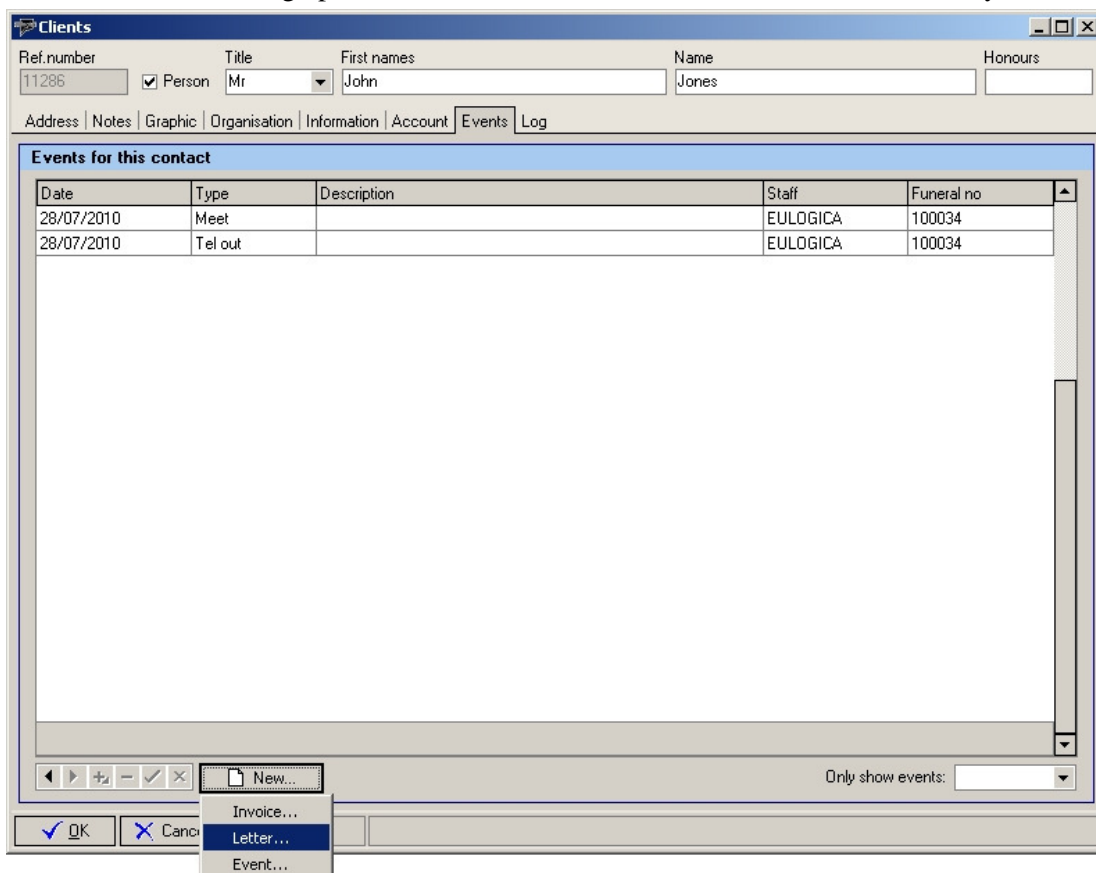
## N.1 Writing a letter in Eulogica

You can use Eulogica to write up letters, bringing in the address details straight from the database. You can also set up standard letters so that the wording you regularly write is brought straight in for you. Each letter can be marked as sent and is tracked in the Events list of the contact it was sent to. This means that a history of your communication is kept in the system for easy reference.

There are two ways of starting a new letter to a contact – direct from the Contact File or as a blank letter from the Main Menu.

### N.1.1 Creating a letter from a contact file

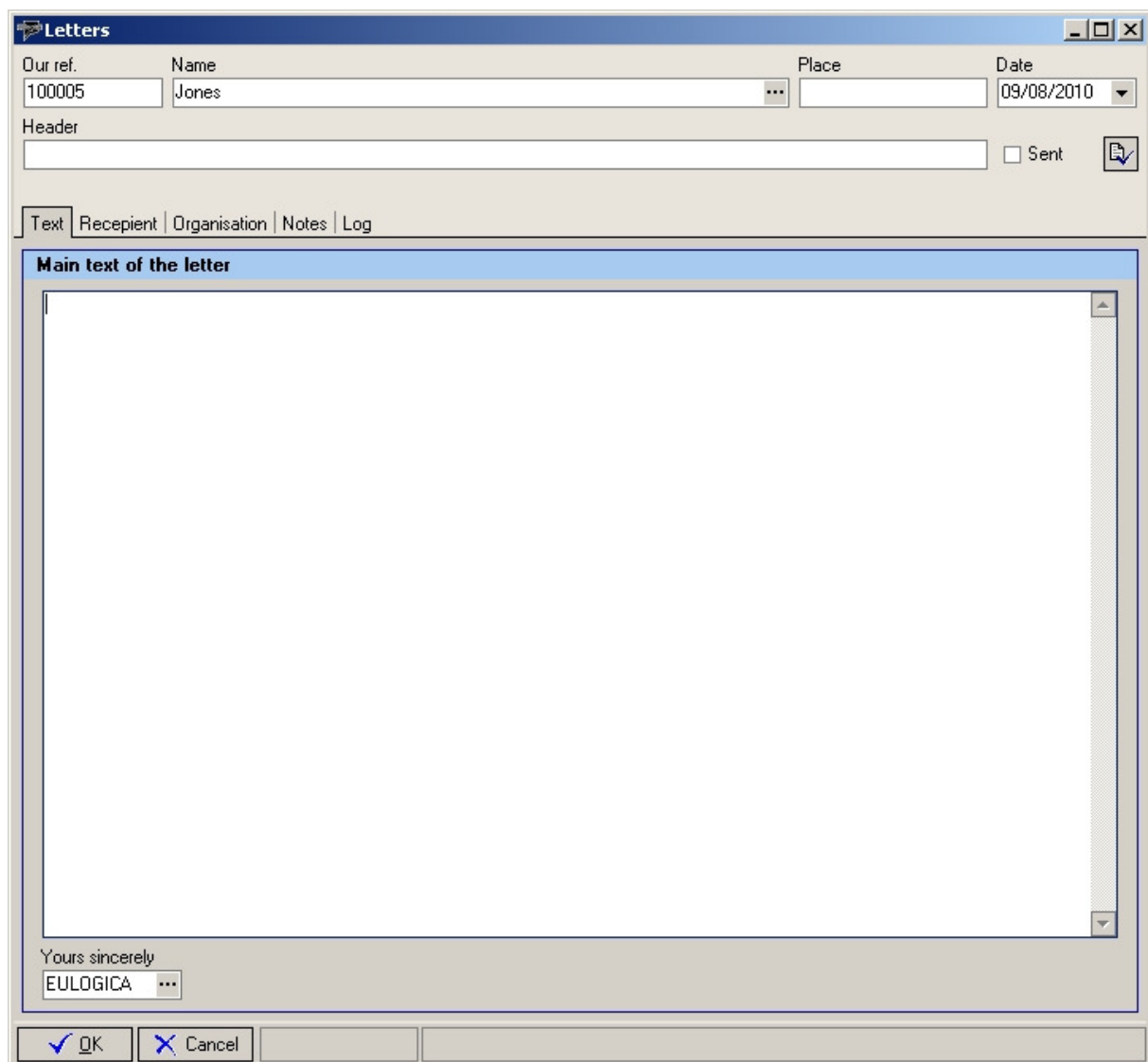
To create a letter from a contact file you first need to open the contact file, either from the client or a supplier from within a funeral or from **Main Menu | Contacts**, choosing the required category and then finding the contact you want. With the contact file open, go to the **Events** tab. If you press the **New...** button at the bottom you will be presented with various options, one of which is **Letter...**, as shown below. This will bring up a new blank letter, with the contact details filled in for you.



## N.1.2 Creating a letter from the Main Menu

On the **Main Menu**, open the **Miscellaneous** menu and select **Letters**. This will bring up a list of all the letters that have been created, in the same way that Funerals or Contacts are displayed. You will be able to see the date of the letter, references, header and if the letter has been marked as sent, along with branch and staff details and, of course, the recipient. As with creating a new funeral or contact file, press the New button at the bottom of the list, or the New button at the top-left of the screen. If you have templates set up you will be able to choose which to use, for a blank letter choose “**(None)**”. This will open up a blank letter, or a letter based on a template if you chose a template. Note that if there are no templates set up you will not get any options and a blank letter will be created.

## N.1.3 The Letter window



The screenshot shows the 'Letters' window with the following details:

- Our ref.:** 100005
- Name:** Jones
- Place:** [Dropdown menu]
- Date:** 09/08/2010
- Header:** [Text input field]
- Sent:**
- Yours sincerely:** EULOGICA [Dropdown menu]

The screenshot above shows a new blank letter. The **Our ref** field is generated automatically but can be changed if necessary. The **Yours sincerely** box is based upon the person who is logged in, but can be changed and is where you set the sender of the letter. The **Date** field is filled in with the current date. If you create a new letter from a contact file, the **Name** field will be filled in for you. The **Header** field is where you will fill in the subject line for the letter.

## N.1.4 Choosing a recipient

To choose who you are sending a letter to you must first specify the contact file. To do this click on the button with three dots, to the right of the **Name** field. This opens the Clients contact list. Choose a client by double-clicking on them or selecting them from the list and pressing the **Open** button. If you want a contact from another list, such as Churches and Chapels or Doctors, click the **Other** button at the bottom right and choose the contact file necessary from the options that appear. You can then choose the correct contact as usual.

When you have chosen your contact the **Name** field will be filled in and the letter's recipient is set to the person marked as **Main Contact** within the contact file. You can change this by going to the **Recipient** tab and clicking on either of the buttons with three dots next to the Contact person first name and Contact person surname fields. This will bring up a list of names from the **More Contacts** tab of the contact file. If you chose the button for first name then the list will be sorted by First name and by Last name if you chose the surname button. Double click the person or select them and press **Open** to choose the recipient you want.

## N.1.5 Saving a letter for later

If you wish to save your letter and come back to it later you can click th **OK** button at the bottom of the letter window. This will ask you if the letter should be marked as sent. Unless you have printed and sent your letter, choose No. This will save your letter and close the letter window. If you choose Yes the letter will be marked as sent before it is saved.

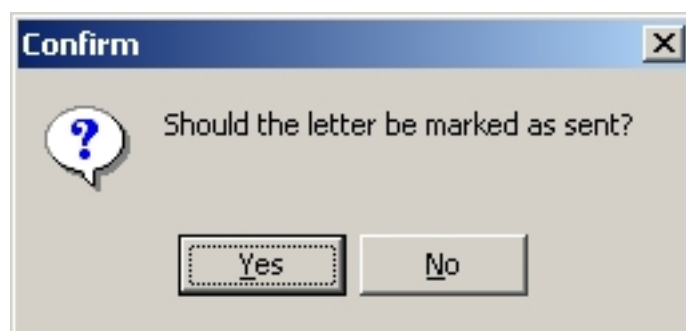
To open the letter again, on the **Main Menu** open the **Miscellaneous** menu and select **Letters**. This will bring up a list of all the letters that have been created. Locate your letter in the list and either double-click it or select it and press the **Open** button.

## N.1.6 Printing and marking a letter as sent

Once your letter is ready you can print or email in the usual manner. For more information on this please see the Printing Options section. When you have sent the letter you can either tick the **Sent** tick box or press the button next to this, shown here:



You can also press the **OK** button in the bottom left, which will also ask you if you wish to mark the letter as sent. Whichever option you take, you will be asked this question:



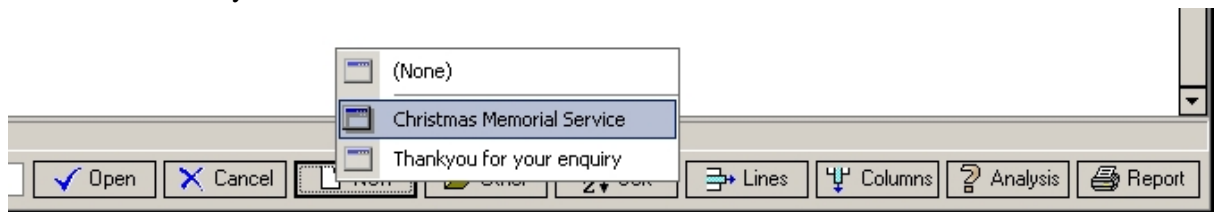
Choosing Yes will mark the letter as sent, which also marks an Event in the contact file saying that this letter has been sent.

## N.2 Letter Templates

The system can store templates for use when writing letters. These can be used to bring in a standard set of text which can then be edited as necessary.

### N.2.1 Creating a letter from a template

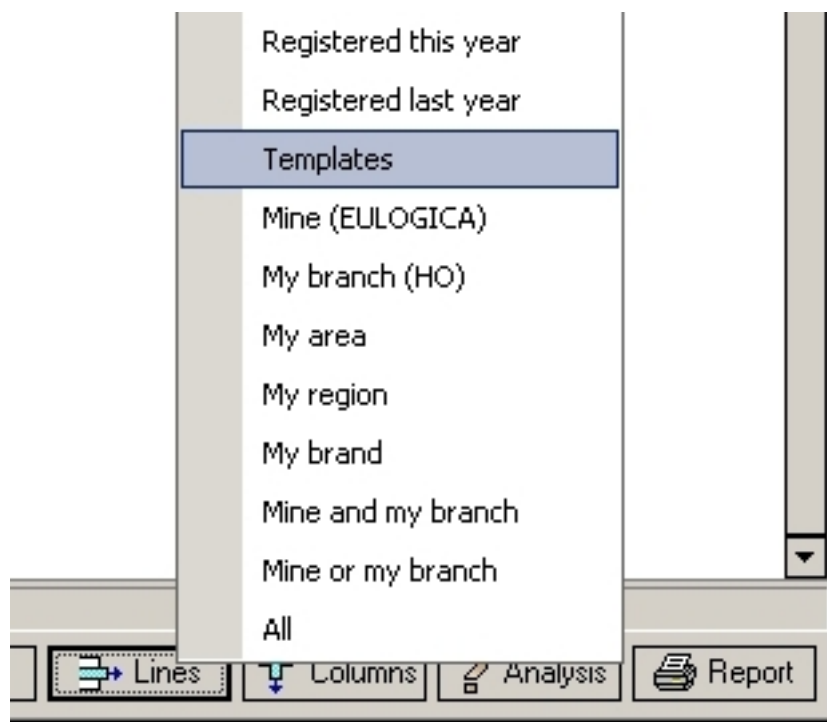
On the **Main Menu**, open the **Miscellaneous** menu and select **Letters**. This will bring up a list of all the letters that have been created, in the same way that Funerals or Contacts are displayed. As with creating a new funeral or contact file, press the New button at the bottom of the list, or the New button at the top-left of the screen. If there are any templates stored in the system, you will be given a list to choose from when you click **New** as shown below.



Selecting a template from the list will create a new letter, ready to edit, with the text and header line as per the template. All you have to do is choose a contact to send it to and you are ready to send it. You can also edit the text for the individual letter before sending, if necessary.

### N.2.2 Creating a new template

To create a new template go to the **Main Menu**, open the **Miscellaneous** menu and select **Letters**. This will bring up a list of all the letters that have been created. Now press the **Lines** button at the bottom right and choose **Templates** from the options that pop up.



This will change the list from displaying the letters in the system to displaying the templates instead. Here you can press the **New** button which will bring up what looks like a blank letter. You can write your letter as usual, giving it a header and putting text in the body. Do not fill in the other fields at this point though. When you are done, press the **OK** button. At this point you will be asked to give a name to the template. Enter a name and press **OK** or press **Cancel** to go back to editing the template. The template will then appear in the list of options when you go to create a new letter.

### N.2.3 Editing an existing template

To edit an existing template, go to the **Main Menu**, open the **Miscellaneous** menu and select **Letters**. This will bring up a list of all the letters that have been created. Now press the **Lines** button at the bottom right and choose **Templates** from the options that pop up. This will change the list from displaying the letters in the system to displaying the templates instead. Find the template you want to edit in the list and select it. If necessary you can change the name of the template at this point, or just press the **Open** button to bring up the template ready to edit.

Simply alter the text as you wish and press the **OK** button to save your changes and close the window.

## N.3 The Multiple Letter Wizard

Eulogica has a useful way for you to send the same letter to a batch of contacts. This is called the Multiple Letter Wizard and can save a lot of time. One use for this could be to send all your clients from the last year a letter about a Christmas memorial service.

### N.3.1 Create a letter template to use

The Multiple Letter Wizard uses the letter templates for creating letters so you need to create your letter beforehand. Follow the steps in the previous section to do this. It will be possible to edit the text of an existing template when going through the wizard.

### N.3.2 Preparing the recipients list

The first step when using the Multiple Letter Wizard is to prepare your list of recipients. To do this, open a list of contacts from the **Main Menu**. This could be any of the lists that have a clients or contacts in them. If using a funerals list, letters will be addressed to the clients of invoiced funerals.

The next step is to filter the list and sort it so that it represents the list you wish to send your letters by using the **Sort** button, as described in **Section E** of this manual. The screenshot below shows a list of Clients (**Main Menu | Contact | Clients**) filtered by town.

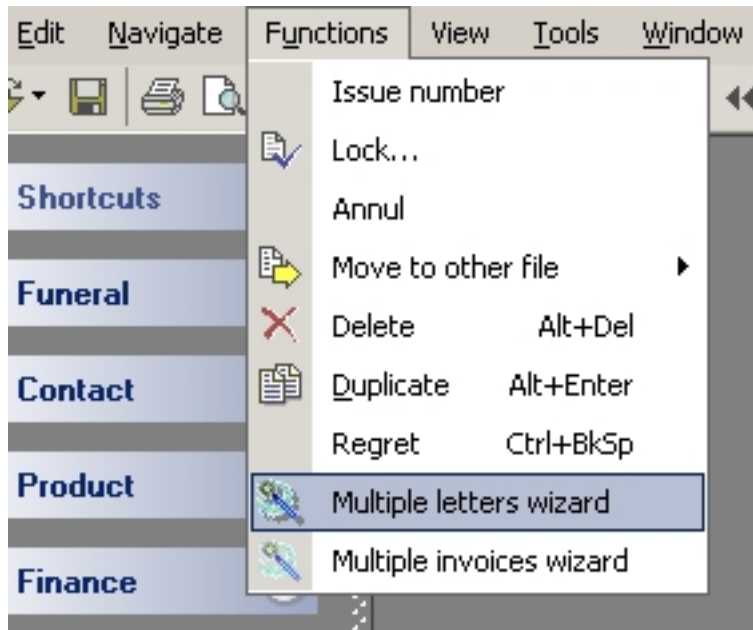
Ref.number	First names	Name	Town	Telephone
11299	Sarah	Blair	Surrey	
11321	Douglas	Blairtest	Surrey	
11295	June	Grayson	Surrey	
11317	Susan	Housley	Surrey	
11312	Graham	Johnson	Surrey	
11298	John	Jones	Surrey	
11316	Gillian	White	Surrey	

7 lines

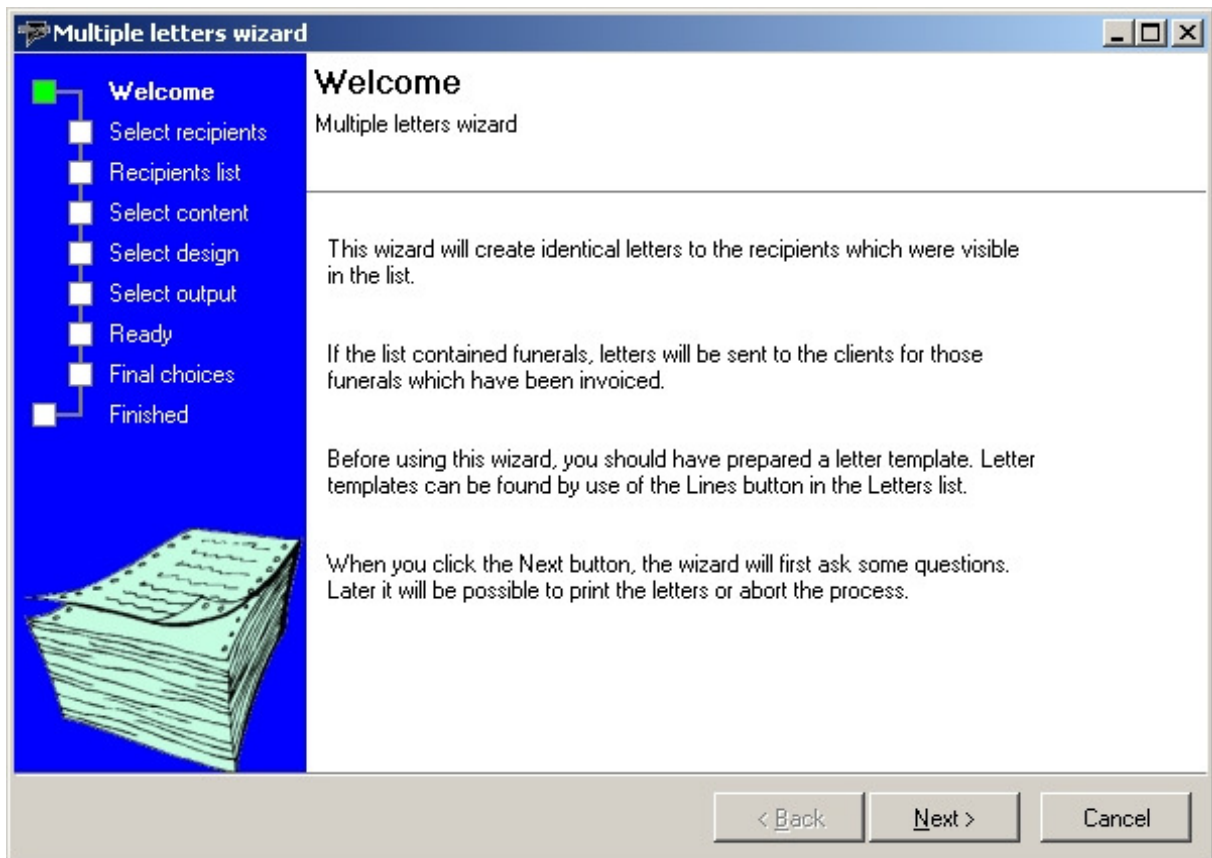
Town:

### N.3.3 Starting the wizard

With your list of contacts ready, click on the **Functions** menu at the top of the screen and choose **Multiple letters wizard**



This will start the wizard and you will see the Welcome screen, shown below, which gives you an introduction to the wizard.



On the left hand side you can see your progress through the wizard. Press the **Next** button to continue.

The next screen allows you to filter your list further. There are options that are based on the **Organisation** tab of the contact file, such as the staff member that is responsible, the area, branch, region or brand, the religion of the contact or two of the custom “group” fields.

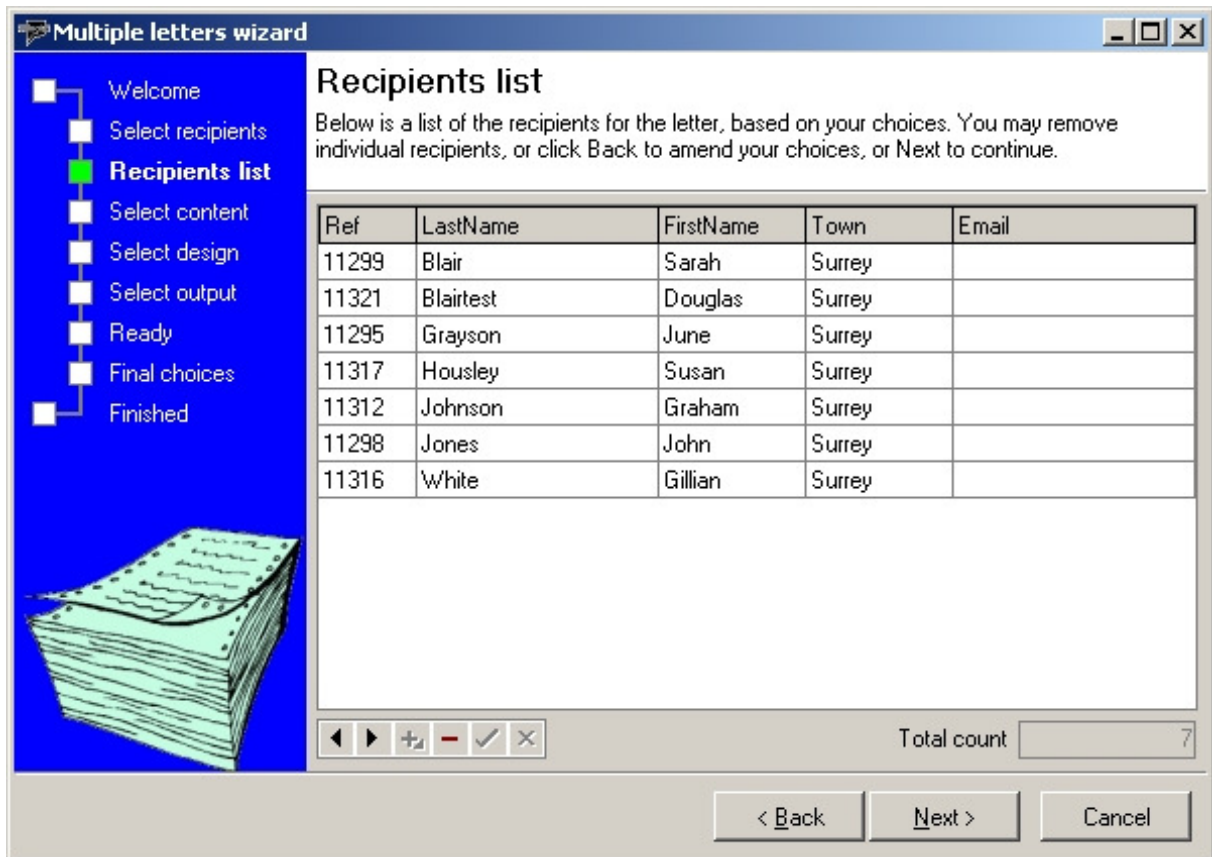


The bottom section of this screen allows you to find only the contacts with or without an email address. Choosing to only include contacts with an e-mail address will clean the list up if you wish to only email the letters. Choosing to only include contacts without an e-mail address would be useful if you have already sent one batch of letters by email and now wish to send to the remaining contacts by post. If you only wish to post the letters then choose the do not consider e-mail address option.

Press **Next** to continue.

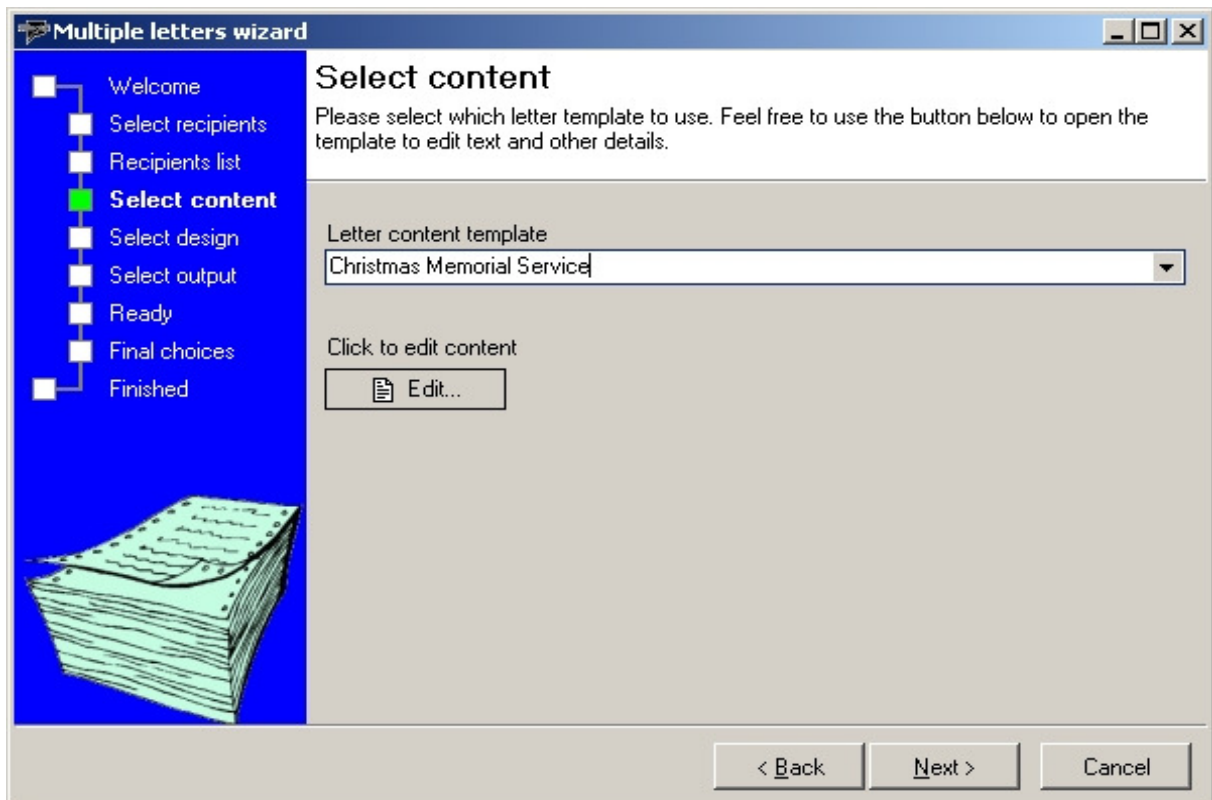
The next screen shows you all the contacts that meet your criteria. Here you can remove individual recipients from the list. To remove a recipient from the list, click on their line and then press the red minus button at the bottom of the screen, shown here.





When you are happy with your list of recipients, press the **Next** button to continue.

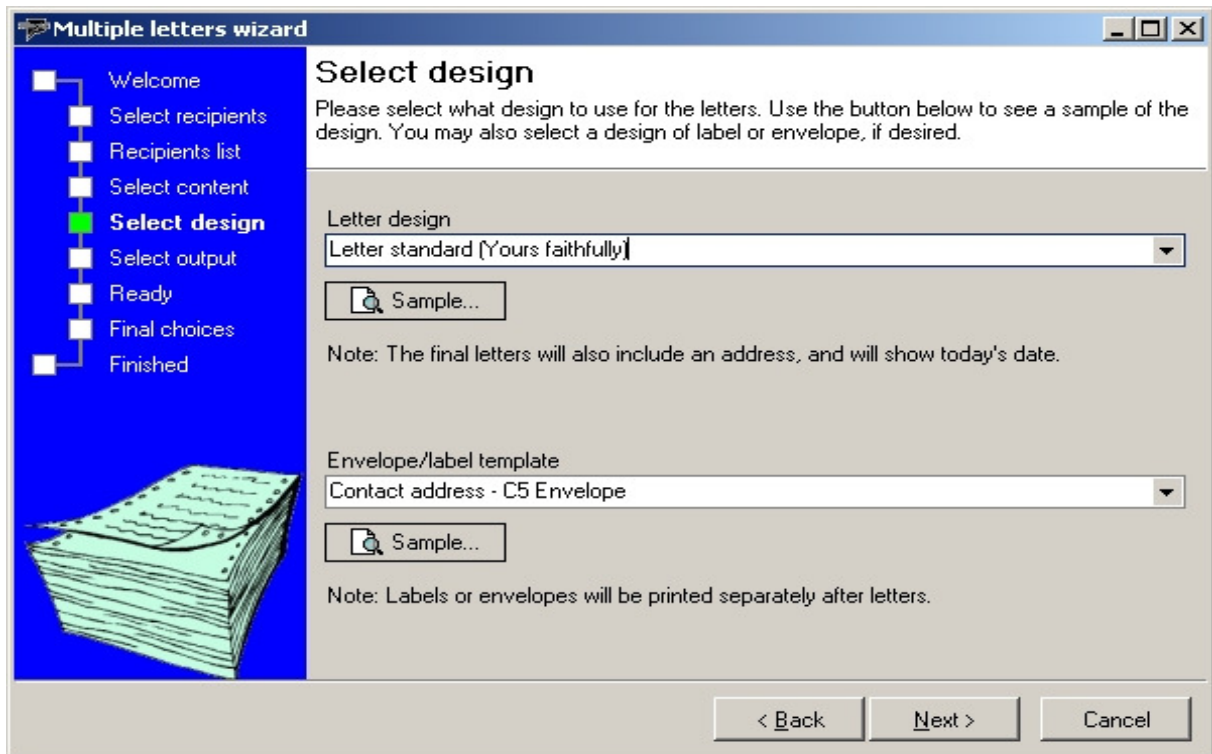
The next screen, shown below, asks you to choose the template for your letter. The drop-down list displays the templates you can choose from.



The **Edit** button allows you to change the text of the letter. This is useful if your template is set up but for this one instance you want to add something extra, or change some wording. By pressing **Edit** you can also change the date which will appear on the letter and who the letter is being sent from. It is always useful to press **Edit** and check that your letter is written how you wish.

Press **Next** to continue to the next step.

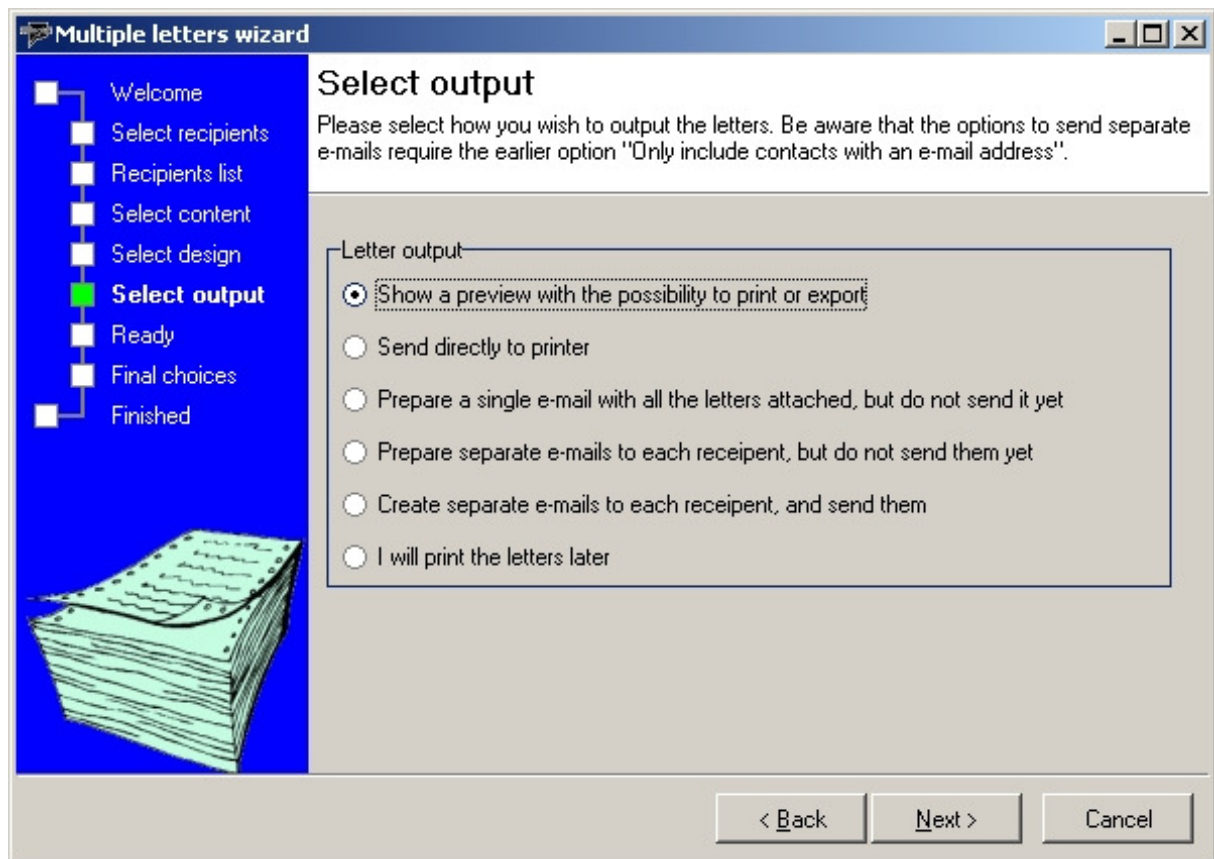
The next step is shown below. This is where you choose the design for your letter and also for your envelopes if you require them. Choose the designs you wish to use from the drop-down boxes. You can press the **Sample** buttons to preview the letter in the selected style.



If you do not wish to print envelopes as well then clear all of the text out of the **Envelope/label template** box by selecting the text and pressing the delete key.

When you have chosen your templates, press **Next** to continue.

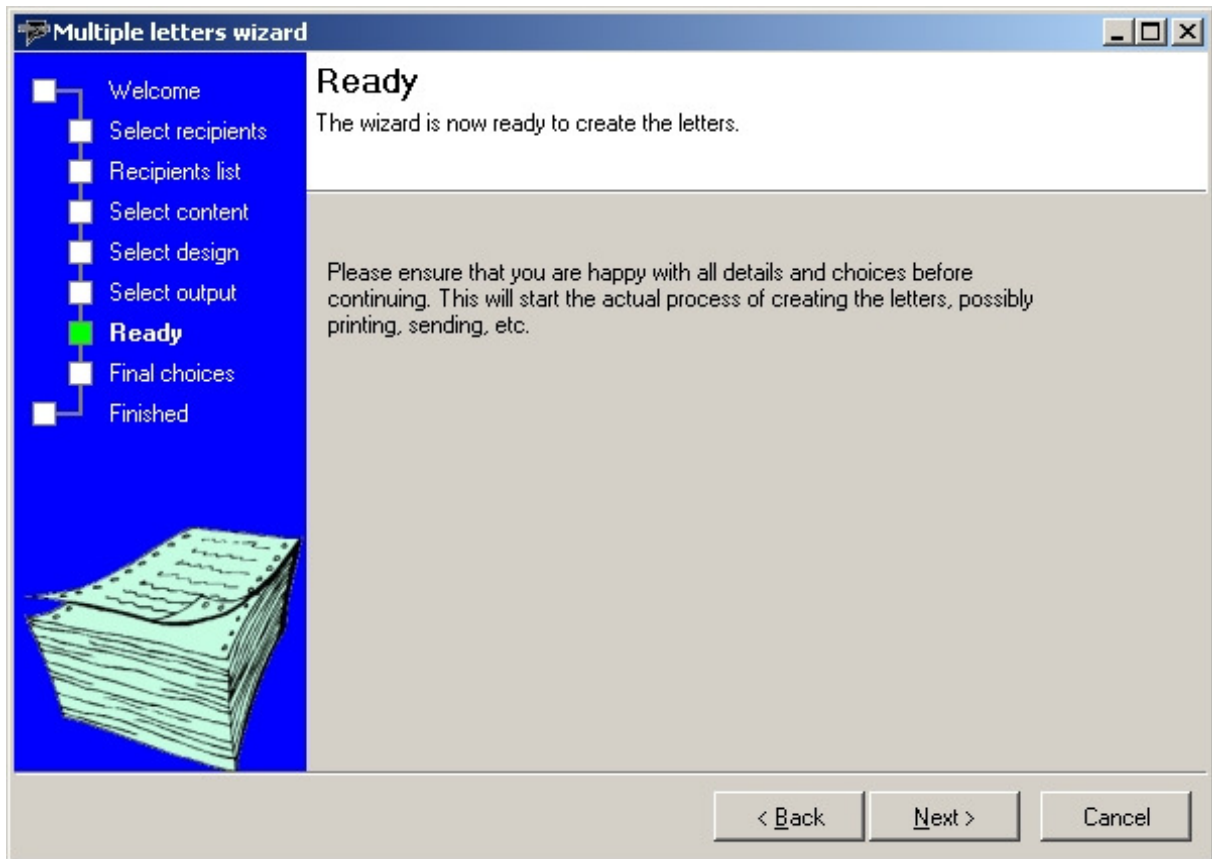
The next screen gives you your options for how you wish to generate the letters.



The options are:

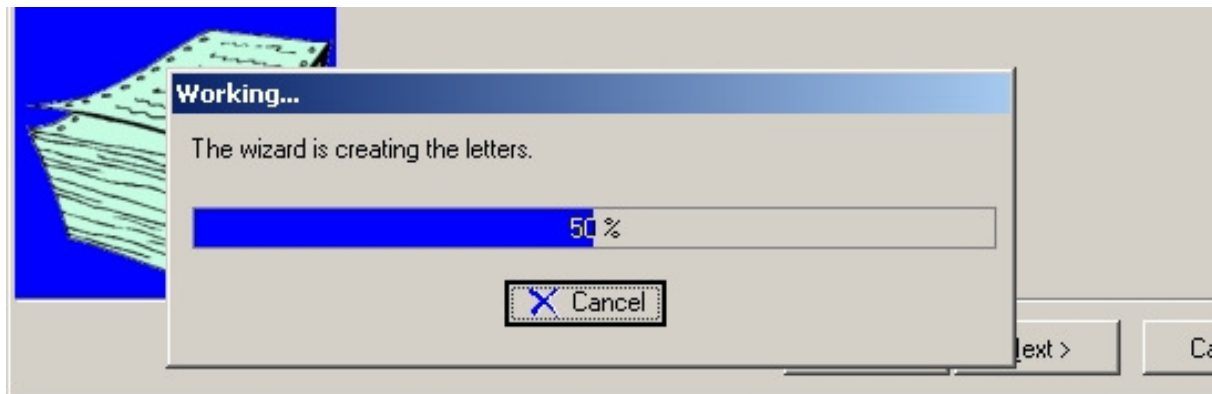
- **Show a preview with the possibility to print or export** – this will generate the letters and bring a print preview of them. From this you can then print or export the document as required.
- **Send directly to the printer** – this will generate the letters and print them out, without a print preview.
- **Prepare a single e-mail with all the letters attached, but do not send it yet** – this will generate the letters and create a single pdf document, attaching it to a new email.
- **Prepare separate e-mails to each recipient, but do not send them yet** – this will generate the letters and attaches each one as a pdf to a new email to each recipient. The emails will open so that you can edit them before sending.
- **Create separate e-mails to each recipient, and send them** – this will do the same as the above option, except this time the emails will be sent automatically.
- **I will print the letters later** – this option generates the letters but does not do anything further with them.

When you have chosen the option necessary, click the **Next** button to move to a confirmation screen.

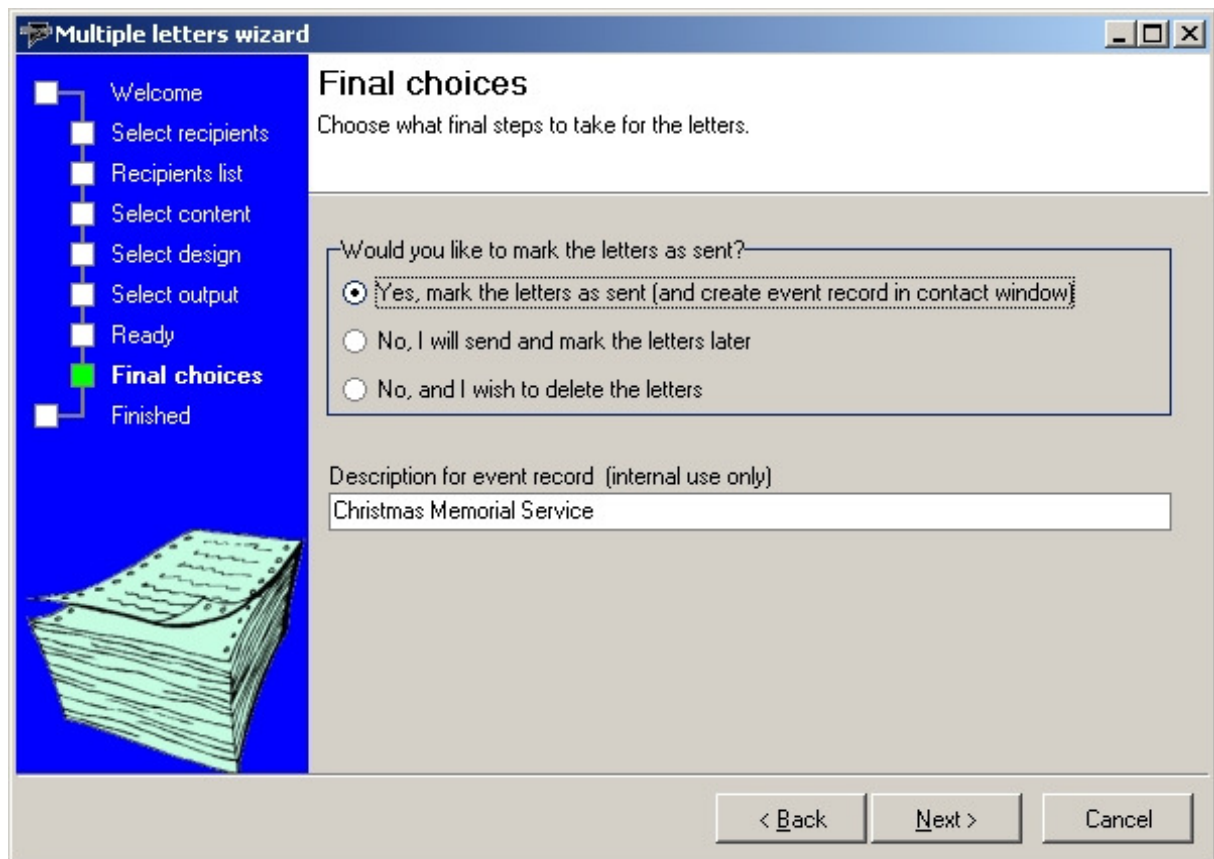


This screen is asking you to make sure you are happy with your settings, as pressing the **Next** button will execute the option you chose for generating the letters.

Press **Next** to generate the letters, or use the **Back** button to go through the previous stages.



When the wizard generates the letters, each one is added to the **Main Menu | Miscellaneous | Letters** list. When the wizard has finished doing this you will be presented with a print preview if you chose that option. If you chose to generate the envelopes as well these will be generated when you close the print preview. If you chose to have emails generated this will be done at this stage.



This last set of questions asks you how you wish to mark the letters within the system. The three options are:

- **Yes, mark the letters as sent (and create event record in contact window)** – this option will mark all the letters as sent and also create an event record in each of the contacts that was in the list.
- **No, I will send and mark the letters later** – this will leave the letters marked as 'not sent' and will not create an event for each contact. The letters will be in the letters list under **Main Menu | Miscellaneous | Letters**.
- **No, and I wish to delete the letters** – this will remove the letters from the letters list and leave no record that you created the letters.

Press the **Next** button to execute your option and finish the wizard. You will see a final confirmation screen that tells you the wizard is finished. Press the **Finish** button to close the wizard.