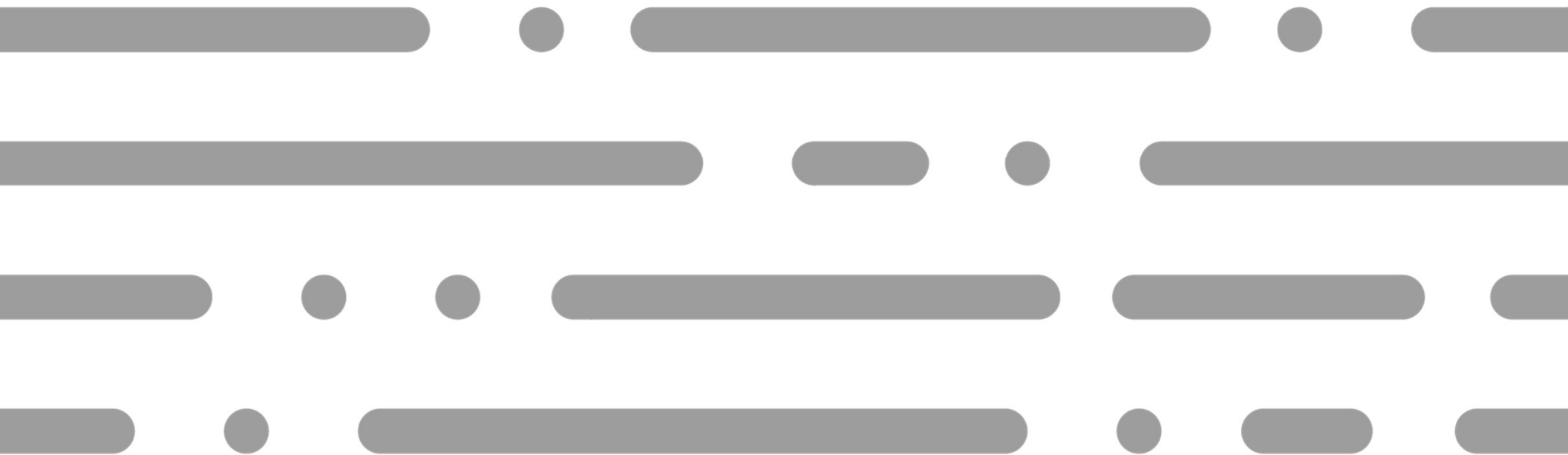# Festive Messaging with Sage Letters

Tina Stewart

Agenda

- **POLL – do you currently use the Sage Letters module?**

- **Standard Letters**

- **Saving As New**

- **Editing Content**

- **Other changes**
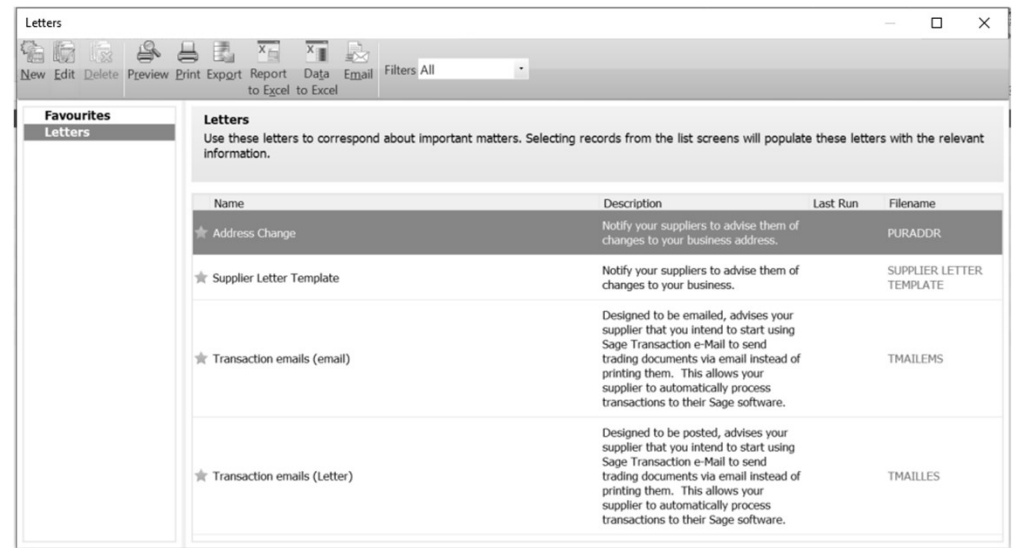
- **Further Support**

Letter Templates

Letter Templates

Customers > Letters

- Address Change

- Transaction Email

- Payment Reminders
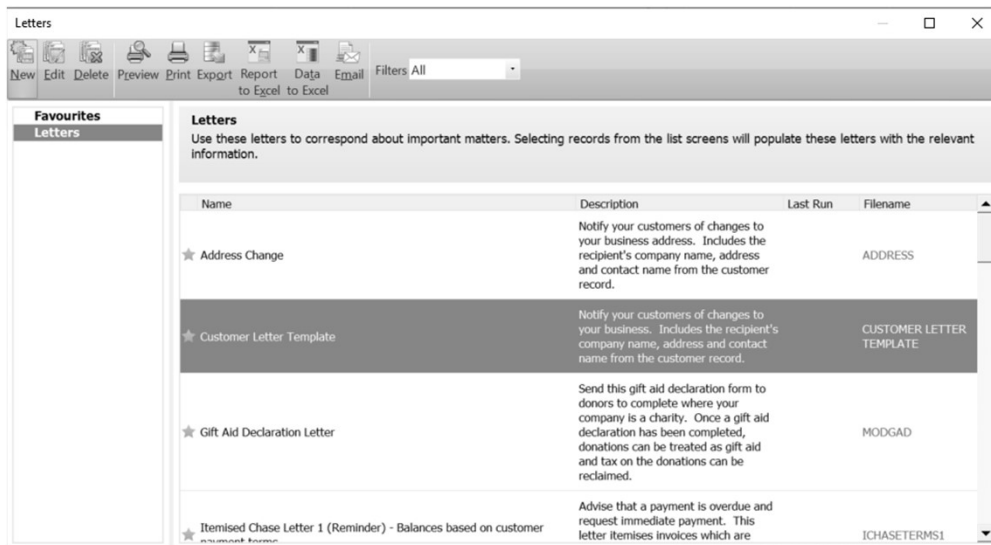
- Chase Letters

- Gift Aid Declaration (Charities)

Suppliers > Letters

- Address Change

- Transaction Email

Sage

Letter Templates

Create a new letter Help Centre Article
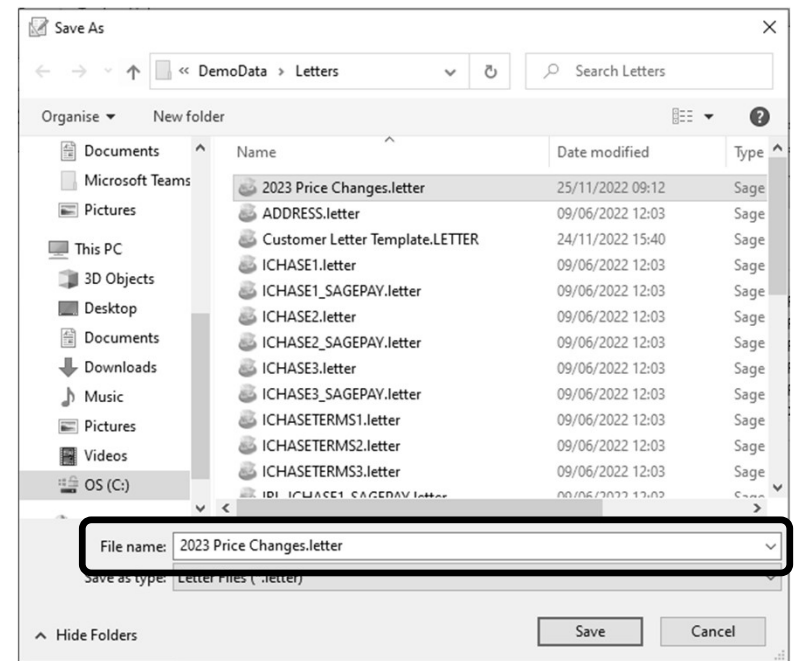
Creating a copy of a letter

To change the **name** of the letter: -

- Report > Report Properties > change Report Name > OK
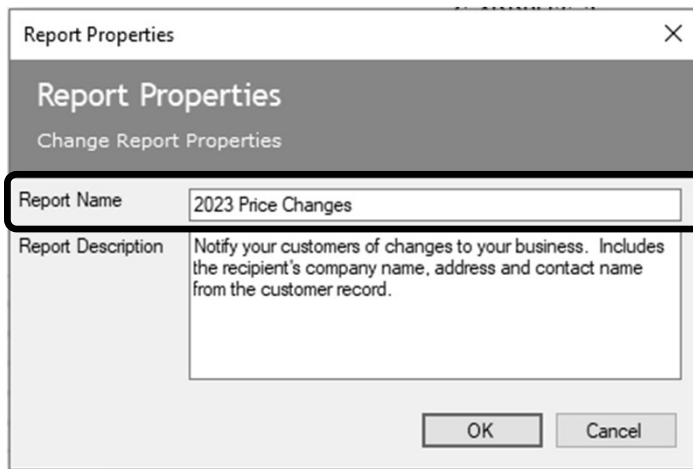
To change the **filename** of the letter: -

- File > Save As > add filename > Save

Editing body text

Manually: –

- Click on text box > hit ENTER key on keyboard > delete existing text > type new text

Copy / Paste: –

- Select text from letter in Word (**CTRL A** for all)

- Copy text from letter (**CTRL C**)

- Click on text box > hit ENTER key on keyboard > delete existing text

- Paste in copied text – **must use CTRL V**

Adding a logo

Add Image/Logo > draw box to size of logo > OK > browse to logo and select > Open

Amending salutation

To show only the **first name** of the customer contact on the letter rather than their full name: -

- Double click on existing data field for CONTACT_NAME to open Expression Editor

- Click **Clear** and copy the following into window then click OK: -
  Substring(SALES_LEDGER.CONTACT_NAME,0,IndexOf(SALES_LEDGER.CONTACT_NAME," "))
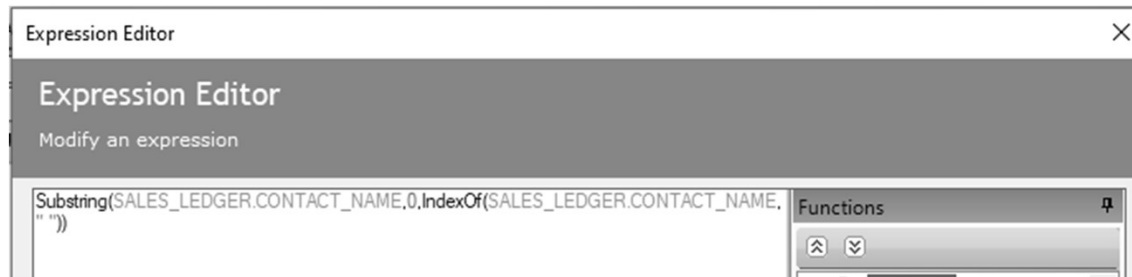
Letter now shows only first name in salutation.

Adding a web link

Web links can be added to either text box or data field

- Select object > Properties Pane > Drill Down property

- Select "Open a web page" from drop-down > paste required web address into fixed web address field > OK

Drill Down ✕

Drill down action
Configure an action to happen when this element is clicked

When this element is clicked | Open a web page ∨

Settings | Advanced

◉ Go to a fixed web address

https://www.sage.com/en-gb/sage-business-cloud/payroll/?utm_medium=
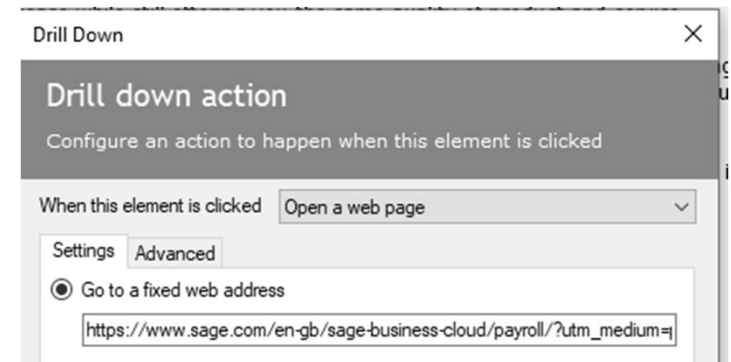
When previewing/emailing from Letters list (not Report Designer) click object to open web page

We greatly appreciate your continued support in this time of change. Please contact our team if you have any questions or concerns regarding this price change.

CLICK HERE FOR PRICE CHANGES

Sage

Reducing white space

Move objects at the end of the letter further up the page: -

- Drag and drop

- Select objects and use direction arrow keys on keyboard

<u>Before</u>

We greatly appreciate your continued support in this time of change. Please contact our team if you have any questions or concerns regarding this price change.

CLICK HERE FOR PRICE CHANGES

Yours sincerely

CompanyName

<u>After</u>

We greatly appreciate your continued support in this time of change. Please contact our team if you have any questions or concerns regarding this price change.

CLICK HERE FOR PRICE CHANGES

Yours sincerely

CompanyName

Favourites

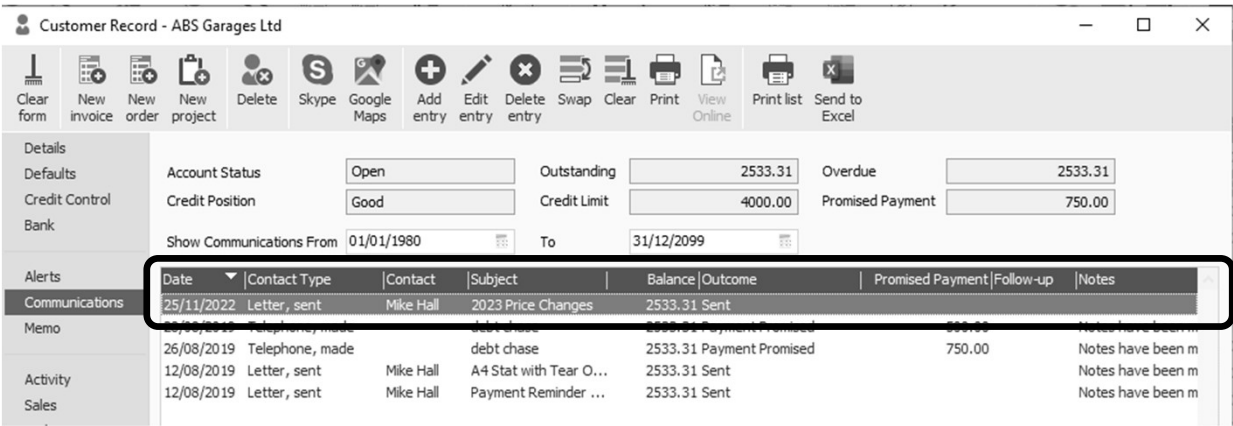Click the star to the left of any letter....

....to show it as a Favourite, for easy access

Sage

Communication History

Each time a letter is either **Printed** or **Emailed** from Sage, you have the option of updating the communication history in the customer record.

Click **Yes** to record the sending of the letter in the **Communications** tab in the Customer Record

Completed Letter – Before and After

Stationery & Computer Mart UK
Sage House
Benton Park Road
Newcastle Upon Tyne
NE7 7 LZ

Tel : 0191 955 3000
E Mail : newbusinessadvice@sage.com

ABS Garages Ltd
Unit 34
Holystone Ind Estate
Hebburn
Tyne & Wear
NE31 1VB

24 November 2022

Dear Mike Hall

Please enter your text here

Yours sincerely

Stationery & Computer Mart UK

Stationery & Computer Mart UK
Sage House
Benton Park Road
Newcastle Upon Tyne
NE7 7 LZ

Tel : 0191 955 3000
E Mail : newbusinessadvice@sage.com

ABS Garages Ltd
Unit 34
Holystone Ind Estate
Hebburn
Tyne & Wear
NE31 1VB

25 November 2022

Dear Mike

We're reaching out to advise you that there will be an increase of 5% on our product range with effect from 1 January 2023. This increase is a result of both high demand and limited stock availability.

We as a business are committed to offering you the quality you expect and deserve, and have found a way to minimise the price increase while still offering you the same quality of product and service.

Any orders placed before 24 December 2022 will be honoured at 2022 prices, and we encourage you to place any orders before this date as we will be closing for the festive period from 4pm on 24 December until we reopen at 9am on 3 January 2023.

We greatly appreciate your continued support in this time of change. Please contact our team if you have any questions or concerns regarding this price change.

CLICK HERE FOR PRICE CHANGES

Yours sincerely

Tina Stewart
Office Manager
Stationery & Computer Mart UK

Recap

- Download the layouts only backup from the Help Centre Article, and restore into your Sage company

- New Customer Letter template in Customers > Letters and Supplier Letter template in Suppliers > Letters

- Save As – to avoid overwriting the original templates

- Copy and paste main body of letter from Word, or enter manually in Report Designer

- When printing or emailing letters from Sage, select Yes to the prompt to update the communications tab in the customer / supplier record for traceability

Further Support

Create a New Letter

Reporting Support Hub

Sage Report Design Service