## Festive Messaging with Sage Letters

**Tina Stewart** 



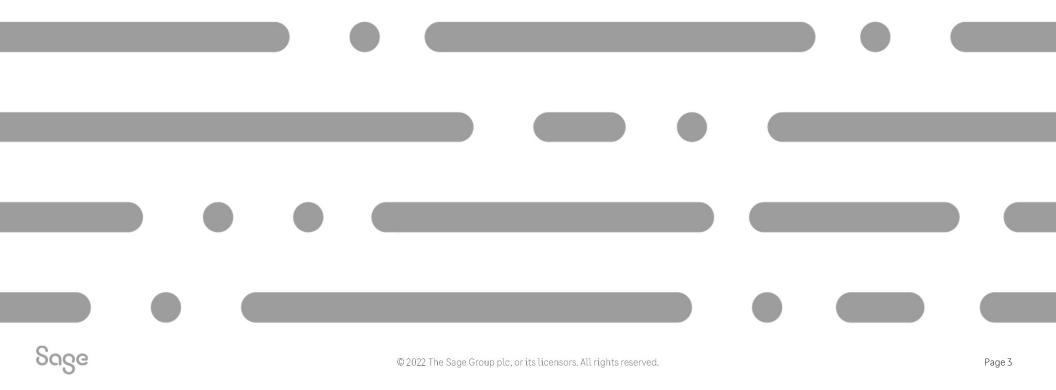


### Agenda

- POLL do you currently use the Sage Letters module?
- Standard Letters
- Saving As New
- Editing Content
- Other changes
- Further Support

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### **Letter Templates**



### **Letter Templates**

### **Customers > Letters**

- Address Change
- Transaction Email
- Payment Reminders
- Chase Letters
- Gift Aid Declaration (Charities)

### Suppliers > Letters

- Address Change
- Transaction Email

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Favourites Letters	Letters Use these letters to correspond about important mainformation.	tters. Selecting records from the list screens will popula	te these lette	ers with t	the rele	vant
	Name	Description	Last Run	Filena	ame	
	🕆 Address Change	Notify your suppliers to advise them of changes to your business address.				
	🚖 Supplier Letter Template	Notify your suppliers to advise them of changes to your business.		SUPPL	.IER LET LATE	TER
	★ Transaction emails (email)	Designed to be emailed, advises your supplier that you intend to start using Sage Transaction e-Mail to send trading documents via email instead of printing them. This allows your supplier to automatically process transactions to their Sage software.		TMAII	LEMS	
	★ Transaction emails (Letter)	Designed to be posted, advises your supplier that you intend to start using Sage Transaction e-Mail to send trading documents via email instead of printing them. This allows your supplier to automatically process transactions to their Saae software.		TMAII	LLES	



### **Letter Templates**

#### Create a new letter Help Centre Article

Letters				— D	$\times$
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Favourites Letters	Letters Use these letters to correspond about important matters. Selecting information.	records from the list screens will popu	late these le	tters with the relev	ant
	Name	Description	Last Run	Filename	
	★ Address Change	Notify your customers of changes to your business address. Includes the recipient's company name, address and contact name from the customer record.		ADDRESS	_
	★ Customer Letter Template	Notify your customers of changes to your business. Includes the recipient's company name, address and contact name from the customer record.		CUSTOMER LETTE TEMPLATE	R
	★ Gift Aid Declaration Letter	Send this gift aid declaration form to donors to complete where your company is a charity. Once a gift aid declaration has been completed, donations can be treated as gift aid and tax on the donations can be reclaimed.		MODGAD	
	Itemised Chase Letter 1 (Reminder) - Balances based on customer	Advise that a payment is overdue and request immediate payment. This letter itemises invoices which are		ICHASETERMS1	

	Stationery & Computer Mart UK Sage House Benton Park Road Newcastie 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 IVB 24 November 2022 Dear Mike Hall Please enter your text here	
Yours sincerely	
Stationery & Computer Mart UK	



## Creating a copy of a letter

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

 Report > Report Properties > change Report Name > OK

Report Properties X										
Report Properties Change Report Properties										
Report Name	2023 Price Changes									
Report Description	Notify your customers of changes to your business. Includes the recipient's company name, address and contact name from the customer record.									

#### To change the **filename** of the letter: -

• File > Save As > add filename > Save

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Desktop	8	ICHASE2.letter	09/06/2022 12:03	Sa
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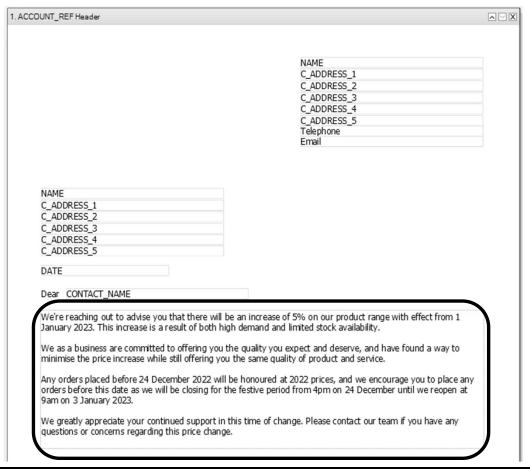
# **Editing body text**

#### 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

2023 PRICE CHANGES.LETTER - "2023 Price Changes" - Sage Report Designer -								×
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## **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," "))

ſ	Expression Editor	×
-	Expression Editor	
l	Modify an expression	
	Substring(SALES_LEDGER.CONTACT_NAME,0,IndexOf(SALES_LEDGER.CONTACT_NAME, Functions	<b>₽</b>

Letter now shows only first name in salutation.



25 November 2022



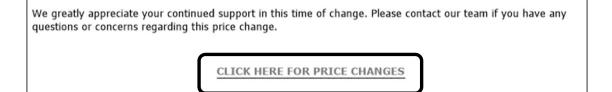
## Adding a web link

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 d	Drill down action								
Configur	e an action to h	appen when this element is clicked							
When this	element is clicked	Open a web page	×						
Settings	Advanced	open a neo page							
Go to	a fixed web addres	35							
https	://www.sage.com/	/en-gb/sage-business-cloud/payroll/?utm_m	edium=į						

When previewing/emailing from Letters list (not Report Designer) click object to open web page





### **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>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



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.

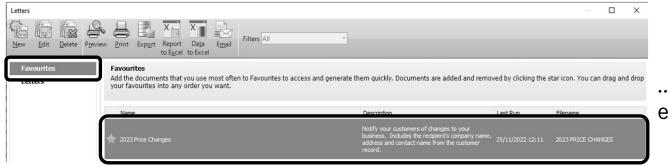
CLICK HERE FOR PRICE CHANGES

Yours sincerely

CompanyName

### Favourites

× Letters 
 Line
 Delete
 Preview
 Print
 Export
 Report
 Data
 Email
 Filters All -New to Excel to Excel Click the star to the left of any Favourites Letters Use these letters to correspond about important matters. Selecting records from the list screens will populate these letters with the relevant information. letter.... Last Run Name Filename Description customers of changes to your includes the recipient's company Notify your customers of changes to your business address. Includes the recipient's Address Change ADDRESS company name, address and contact name from the customer record.



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



# **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

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### **Completed Letter – Before and After**

	Stationery & Computer Mart UK Sage House Benton Park Road Neucartife Upon Tyne NE7 7 L2 Tel : 0191 955 3000 E Mail : newbusinessadvice@sage.com	Sage	Stationery & Computer Mart UK Sage House Benton Park Road Newcastle Upon Tyne NE77 LZ Tel : 0191 955 3000 E Mail : newbusinessadvice@sage.com
ABS Garages Ltd Unit 34 Holystone Ind Estate Hebbum NE3 1 1VB 24 November 2022 Dear Hike Hall Please enter your text here Please enter your text here		ABS Garages Ltd Unit 34 Holystone Ind Estate Hebbum Tyme & Wear NS31 118 25 November 2022 Dear Mike We're reaching out to advise you that there will be an in January 2023. This increases is a result of both high dem We as a business are committed to offering you the gua minimise the price increase will be closing for the febt Sam on 3 January 2023. We gready apprecise your continued support in this tim questions or concerns regarding this price change. CLICK HERE FOR Yours sincerely Tina Stewart Office Manager Stationery & Computer Mart UK	ind and limited stock availability." ity you expect and deserve, and have found a way to me quality of product and service. sured at 2022 prices, and we encourage you to place any re period from 4pm on 24 December until we reopen at

Sage

### 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
<u>Create a New Letter</u>
<u>Reporting Support Hub</u>
<u>Sage Report Design</u> <u>Service</u>

