

# Festive Messaging with Sage Letters

Tina Stewart

Sage



# Agenda

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

# Letter Templates



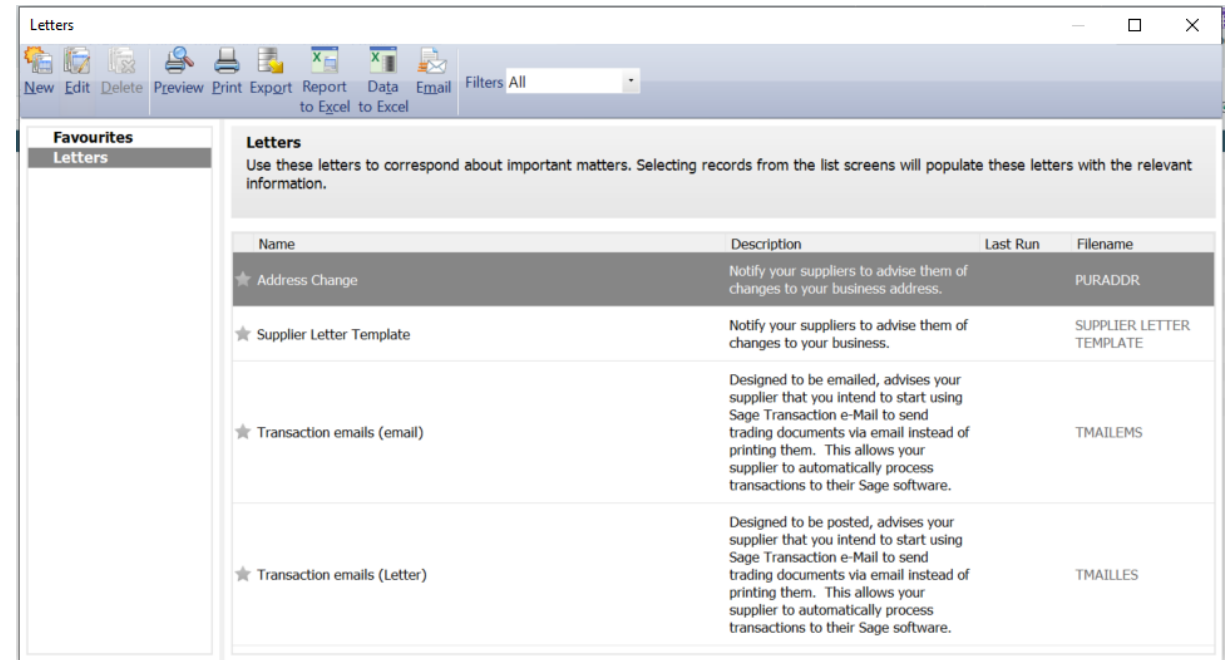
# Letter Templates

## Customers > Letters

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

## Suppliers > Letters

- Address Change
- Transaction Email



# Letter Templates

Create a new letter Help Centre Article

Letters

New Edit Delete Preview Print Export Report to Excel Data to Excel Email Filters All

Favourites Letters

Letters

Use these letters to correspond about important matters. Selecting records from the list screens will populate these letters with the relevant information.

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 LETTER TEMPLATE
★ 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 payment terms	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  
Newcastle Upon Tyne  
NE7 7 LZ  
  
Tel : 0191 955 3000  
E Mail : newbusinessadvice@sage.com

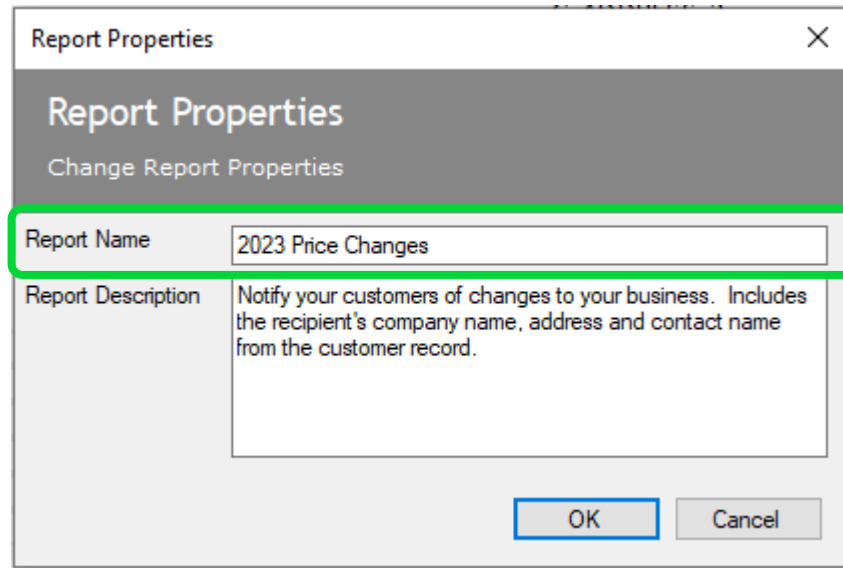
ABS Garages Ltd  
Unit 34  
Holystone Ind Estate  
Hebburn  
Tyne & Wear  
NE31 1VB  
  
24 November 2022  
  
Dear Mike Hall  
  
Please enter your text here

Yours sincerely  
  
Stationery & Computer Mart UK

# Creating a copy of a letter

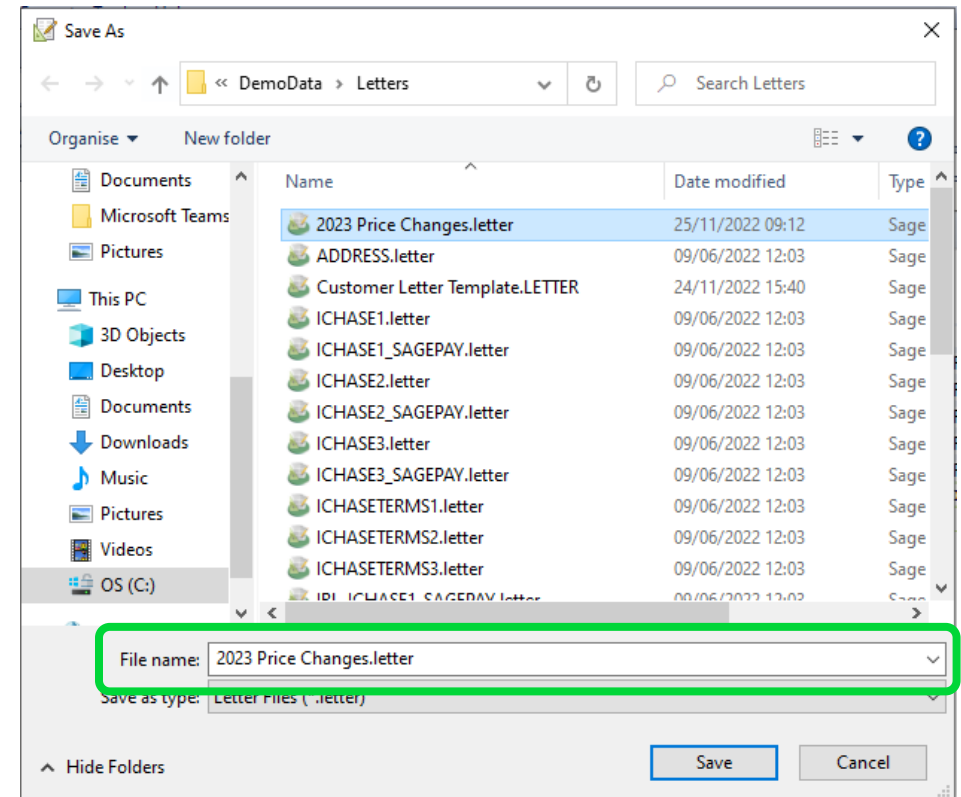
To change the **name** of the letter: -

- 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**

1. ACCOUNT\_REF Header

NAME
C_ADDRESS_1
C_ADDRESS_2
C_ADDRESS_3
C_ADDRESS_4
C_ADDRESS_5
Telephone
Email

NAME
C_ADDRESS_1
C_ADDRESS_2
C_ADDRESS_3
C_ADDRESS_4
C_ADDRESS_5

DATE

Dear CONTACT\_NAME

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.

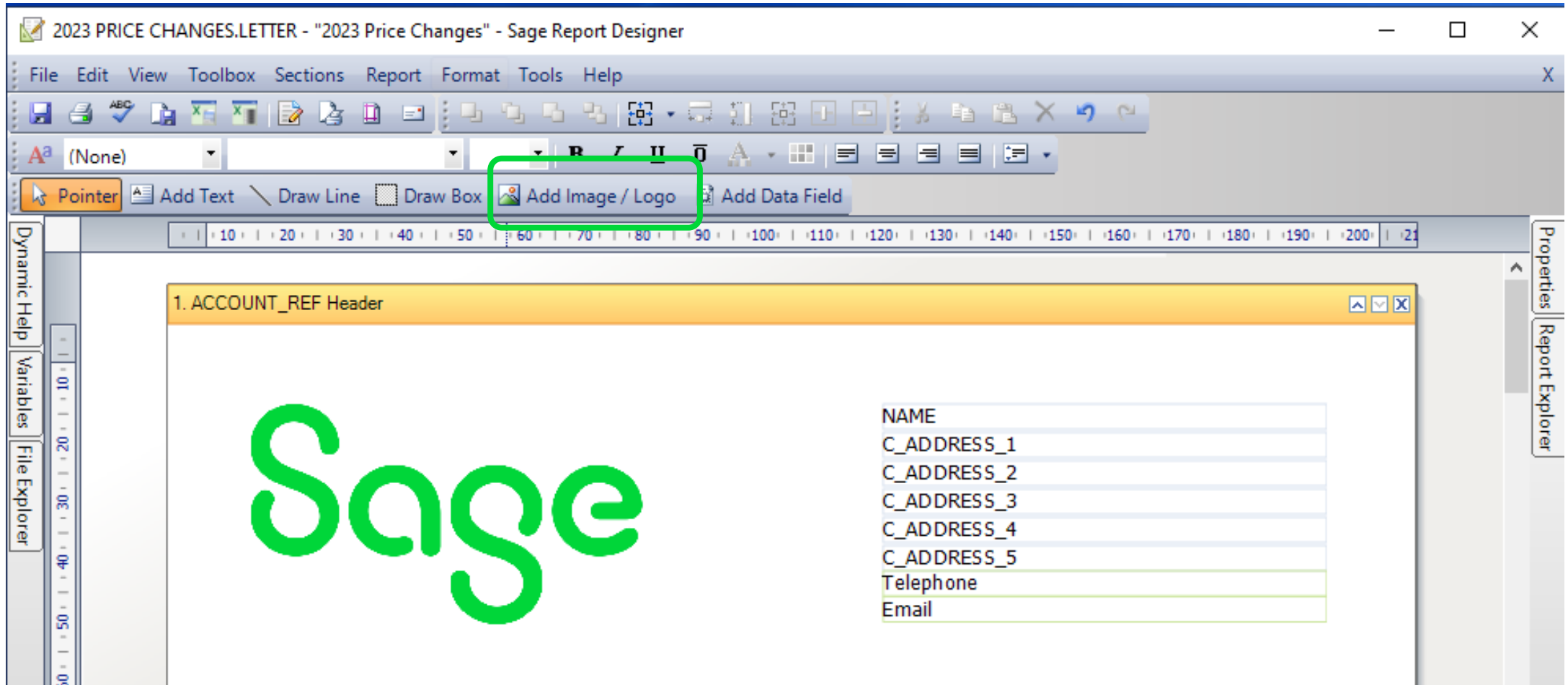
We as a business are committed to offering you the quality you expect and deserve, and have found a way to minimise the price increase while still offering you the same quality of product and service.

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.

# 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," "))`



25 November 2022

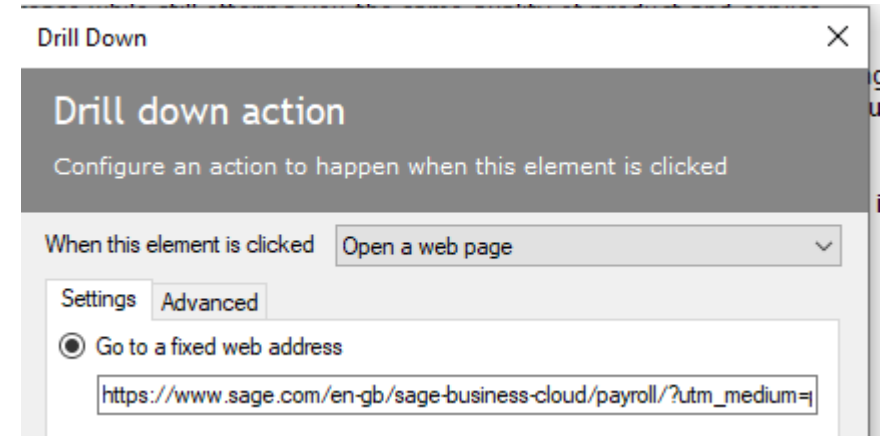
Letter now shows only first name in salutation.

Dear Mike

# 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



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](#)

# 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

## Before

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[CLICK HERE FOR PRICE CHANGES](#)



Yours sincerely

## After

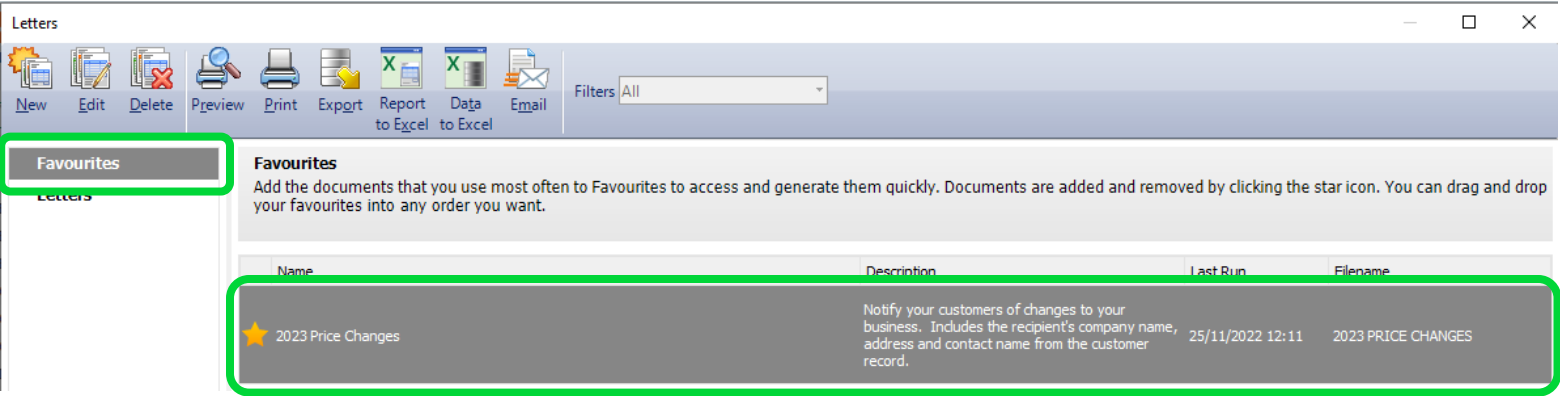
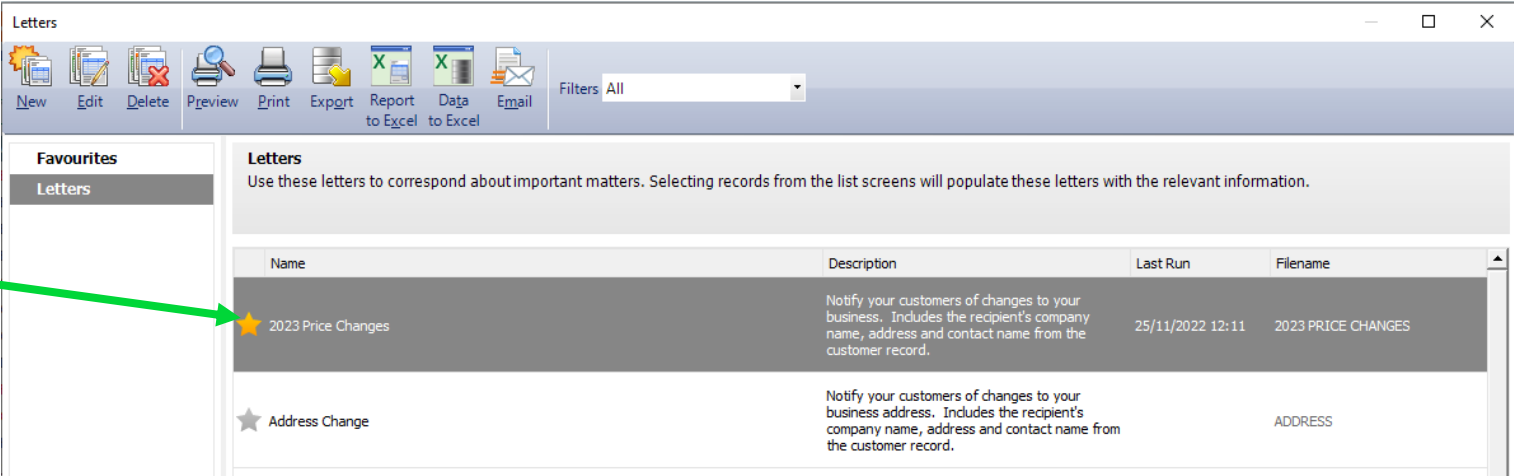
We greatly appreciate your continued support in this time of change. Please contact our team if you have any questions or concerns regarding this price change.

[CLICK HERE FOR PRICE CHANGES](#)

Yours sincerely

# Favourites

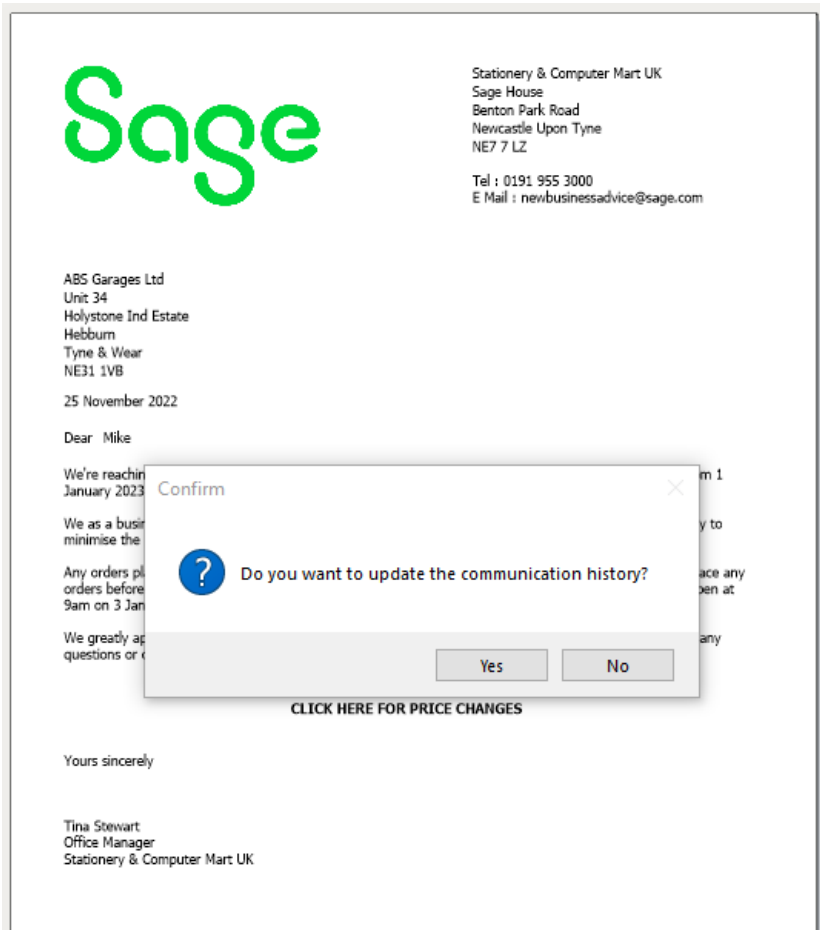
Click the star to the left of any letter....



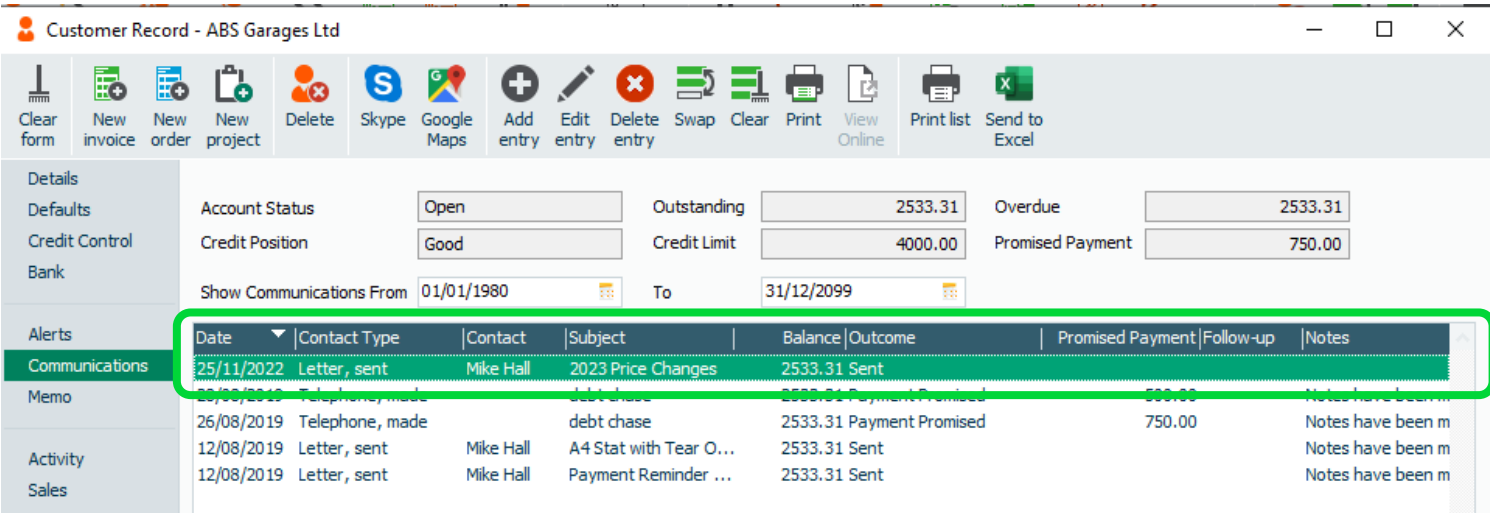
....to show it as a Favourite, for easy access

# 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



# 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

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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](#)