Prospect Communication - Standard Letters

Take2 can simplify communicating with multiple prospects in a number of ways; including standard letters and envelopes customised with the stored details of the person. This can save you time otherwise spent manually typing. These instructions are for the standard letter. The steps for the envelopes are similar.

Three Word files are supplied with Take2 and are copied into the same directory as the Take2 data file on installation. The files are:

- Standard Envelope.doc
- Standard Letter.doc
- Standard Invoice.doc (used for invoices)

These files are also available on the Take2 website.

Creating a Copy of the Standard Letter

1. Double click on My Computer. Navigate to where you have the standard letters stored. By default this will be where your Take2 database is stored.
2. Click the *Standard Letter.doc.*
3. Click *edit* on the menu bar, then *copy*.
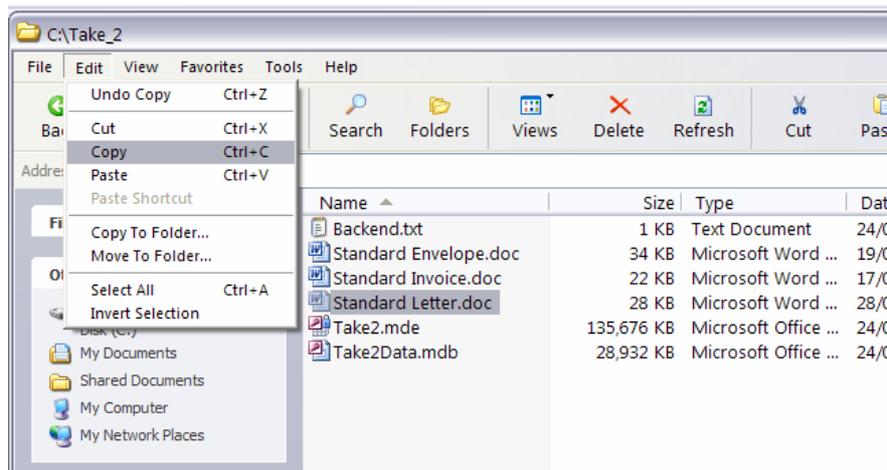
4. Click *edit* on the menu bar, then *paste*.
5. Click *file* on the menu bar, then *rename*. Type the new name of the document, for example *My Standard Letter.doc*

Customising the Letter

1. Double Click the new document. Because the document is not connected to your *Take2* data you will be told that a command will be run. Click *No*.
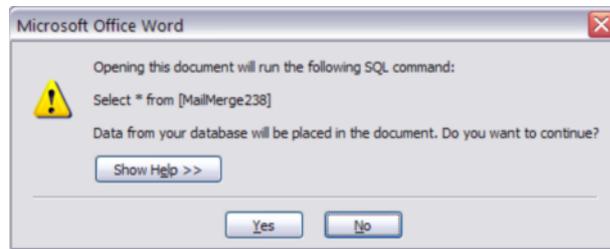
The document opens and you will see mail merge fields.
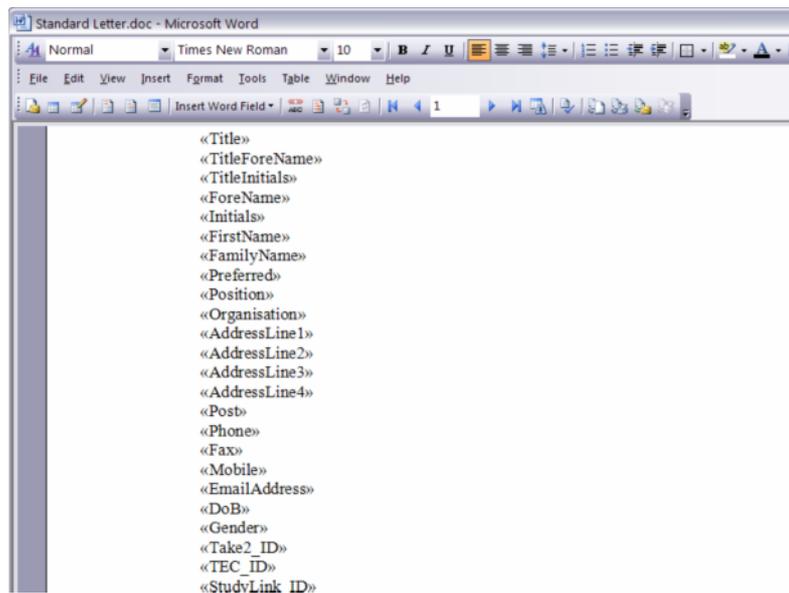
2. Type the document you wish to send. You can copy and paste the text for the letter you wish to send from any other Word document. The fields marked between the << >> signs will be replaced with the information in Take2 when the mail merge is run. You can remove any fields you do not require and move the fields you do want to the correct positions.
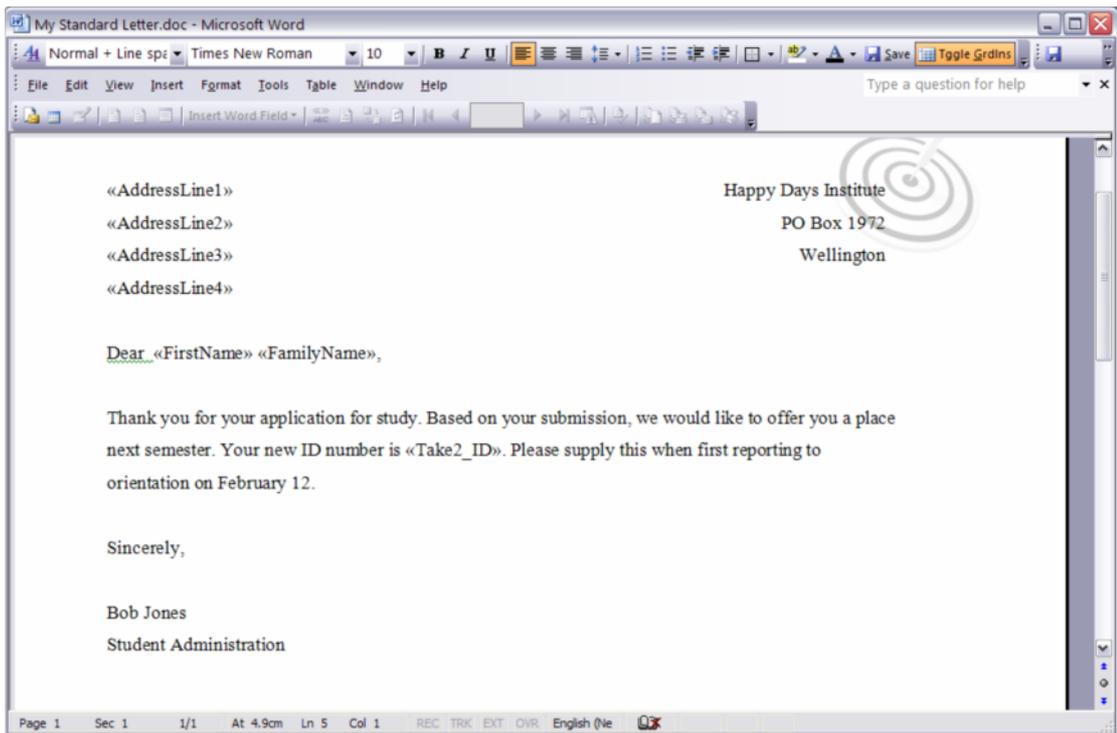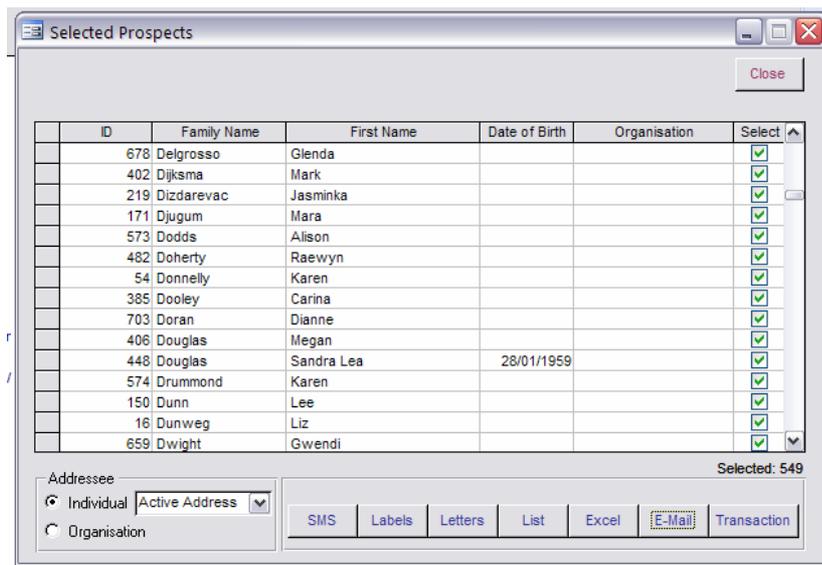
3. Click *file* on the menu bar, then *exit*. Click *save* when asked.


Running the Mail Merge

1. Open *Take2*.

2. Click *Contacts*.

3. Click *Prospect Selection*.

4. To narrow down your selection, use one or more of the available criteria on the various tabs; for example category, dates, warmth, interest etc.
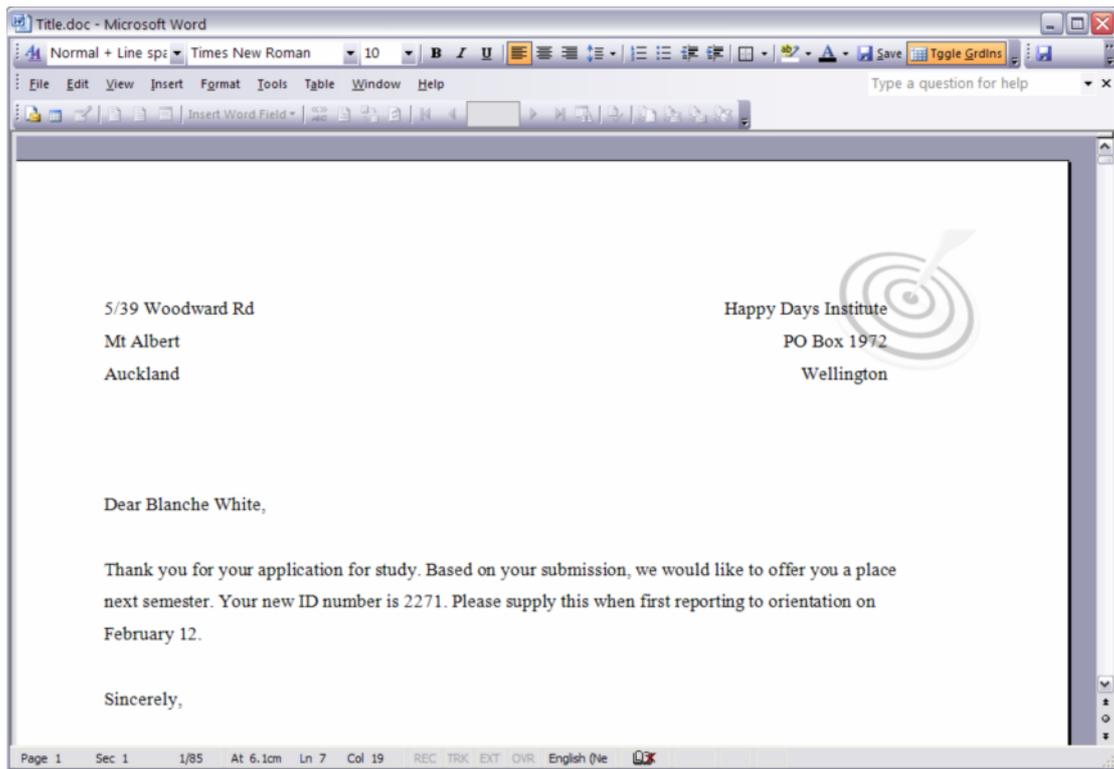
5. Click *Filter*.
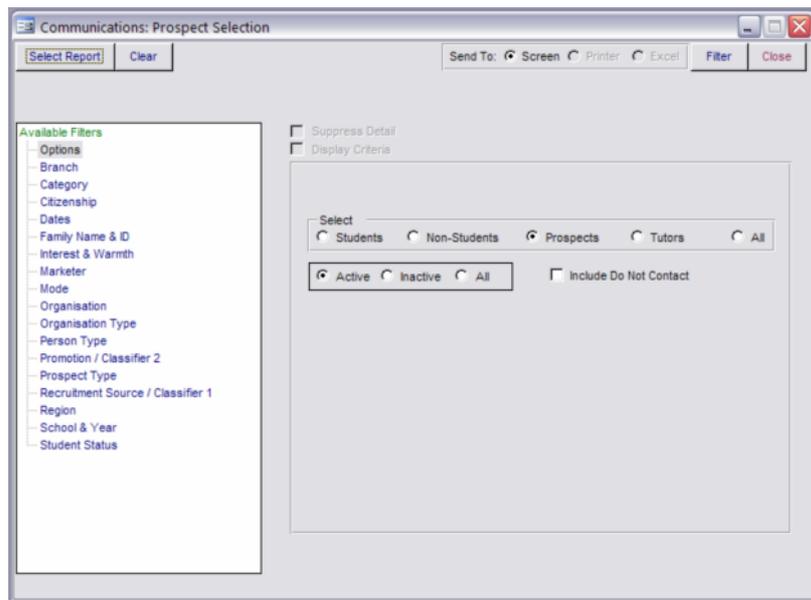
6. A list of prospects is shown. Click *Letters.*

7. Then select *Word Mail Merge*. A *Save File* form opens - find *My Standard Letter.doc* and click *Save*.
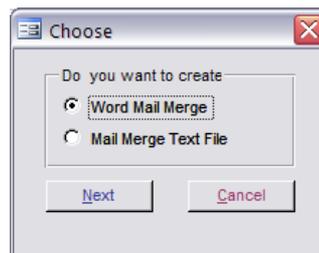
8. A word new document is created based on the *My Standard Letter.doc* customised with the details from the Take2 database. You can now print this as required.

Multiple letters are produced within the same document when more than one person is selected in Take2.