

Make Template

<i>Speech</i>	<i>Cursor Actions</i>
<p>In order to create personalized letters in Sumac, you need to create a template. The first step is to draft the text. Let's assume that we have drafted a letter already. It is just a text file, so it has no special formatting.</p> <p>Select the whole document and copy it to the clipboard.</p>	<p>Open text file on desktop. Select text and copy.</p>
<p>Then choose the Make Template command in Sumac. You can find Make Template in Utilities, under Templates,</p>	<p>Expand Utilities and Template.</p>
<p>and also in the Contacts list, under Mailing.</p>	<p>Click Contacts, Mailing, then Make Template.</p>
<p>This window has lots of help at the top. Once you have read it you can collapse the help to make more room for your template.</p>	<p>Click to collapse help.</p>
<p>This is where you build your template. Paste the letter into this top text field. Now, to personalize your letter, you need to tell Sumac to get data from the database and insert it into the document.</p>	<p>Point to top text field. Paste letter in.</p>
<p>These drop-down menus let you do that!</p>	<p>Point to the area with drop down menus.</p>
<p>First, replace the mailing address.</p>	<p>Highlight mail address then go to Contacts drop-down menu and pick mail address. [it will insert <<c_Mail_Address>>]</p>
<p>Change the salutation. Note that you need to use the virtual salutation. The word <i>virtual</i> means that even if there is no salutation in the contact's record, Sumac will create an appropriate salutation for the contact.</p>	<p>Highlight salutation then go to contact drop-down and pick virtual salutation [It will insert <<c_Virtual_Letter_Salutation>>]</p>
<p>We can also tell Sumac to insert a donation amount and a donation date.</p>	<p>highlight donation amount go to donation dropdown, select total amount [insert <<d_Total_Amount>>] highlight date , go to donation dropdown, select when received [insert <<d_When_Received>>]</p>
<p>If you want to change the date at the top of the letter, you can tell Sumac to insert the current date when you use the template. Select the date, then choose Current Date from the Miscellaneous menu. Sumac inserts the formula that generates the current date in a merged document.</p>	<p>highlight the date, go to misc, choose current date [insert <<g_date>>]</p>

Next, test the template to make sure that it generates the letter you want.	
First choose a contact, then click the Test button.	Choose contact Henry Cavendish, and click Test.
Look at the document produced by the template. The mailing address and salutation are correct.	Point at mailing address and salutation.
But the two pieces of information about the donation – the amount and date – are not filled in. This is because we did not specify a testing context.	Point at the stars (***)).
The Testing Context drop-down menu tells Sumac which list window you will be in when you do the Mail Merge; this enables the Test button to behave more realistically. We clicked the Test button when in the Contacts context. So only contact information was available, and formulas that need donation information did not work.	Point at Testing Context.
Change the context to Donations. In the Donations context, Sumac knows about contact information, and also knows about donation information.	Change Testing Context to Donations.
Now click Test again. This time everything worked.	Click test.
The date, contact, and donation information were all filled in correctly.	Point at results.
By the way, the Test button uses real contact information. But for the other types of records, like donations, it creates test data. So the contact we chose may not have actually made a donation of \$100, or indeed any donations at all. But the Test button creates one to be used for testing purposes.	
Now you have a working template. It consists of some static unchanging text, and some formulas that tell Sumac what information to take from the database to make personalized letters.	Highlight static text. Highlight formulas.
You can insert this text into any word processing or html template,	Copy text and paste into formatted word processing template with logo.
then format it as you like. For example, if you want the amount of the donation to be bold, select the total amount formula. Make sure you include the angle brackets, otherwise the formatting will not be applied correctly in the merged documents.	Format the text: Choose <<d_Total_Amount>> and make it bold.
If you using a word processor, make sure that you save the template in .docx or .rtf format. If you using an html editor, you should save it in .html format for sending email. Remember, when using a template, test it first to make sure that everything works properly.	

When you use mail merge in Sumac to create letters with this template, whether for printing or emailing, the mail merge command personalizes each letter.	
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<i>Check out more training videos to learn more about Sumac.</i>	
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