

FP2 - TIP 'O THE WEEK #14 CREATING LETTER TEMPLATES

Creating letter templates will save you time. Period. Like any other template system, it allows you to re-use work you have already done and spares you the annoyance of having to start from square one each time. Here's how to make it happen.....

CREATING AND USING LETTER TEMPLATES

Letters are linked to either a Properties or a Firefighters record.

1. Go to the record of the property or firefighter to which you will be addressing the letter, and click on the **Letters** button. This will open a window that lists historical letters written from this Property or Firefighter record. Click on the **Add** button to begin creating a letter template.
2. Clicking on Add will open the Letter entry window. To activate the **Create Templates** button, click **OK**. This will take you to the Templates Entry Window.
3. Click on the **Add** Button and enter a name in the *Template Title* field. This will be the way that you identify this template for future use. The Templates you create in a property record will be available from any other property record, and likewise, templates created in a firefighter record will be available from any other firefighter record.
4. On the right-hand side of the screen you will notice a list of Merge field options with a blue background. These are signified by the symbol << >>. In the case of Letter templates, the way that the Merge system works is that it will insert a corresponding substitute from that property or firefighter record into the letter. So for example, if you insert the <<Owner First Name>> merge field into the template creation area (left side of the screen) the system will substitute whatever is listed in the Property record as the Owner's first name once you use this template to create a letter.
5. So, what you want to do in the Template entry window is to write an entire letter in the white area on the left side of the screen, inserting the merge field options wherever appropriate. Double-click on any Merge field option and FP2 will insert it wherever your cursor is placed. You will need to insert spaces and carriage returns manually. When you are satisfied with your letter, click **OK** to save this template.
6. Once you have created a template, you're ready to use it - that's what all this was about in the first place. Back on the Letter Entry window, click on **Edit** and then click on the **Load Template** button.

7. Select the name of the Template you wish to use from the drop-down list of Template titles. Now click, **Choose Template**. This will take you back to the Letter Entry window where the template letter will have been inserted and the merge substitutions will have taken place. Insert a letter title (a name for this particular letter) to complete the process.
8. You can of course edit letter templates as needed. To do so, click on the **Create Templates** button to open the Templates Entry window. Select the title of the template to be edited from the drop-down list and click **Edit**.
9. Incidentally, you can choose to add your department's letterhead to the letter when you print it out, simply by choosing this option from the dialogue box that comes up when you go to print the letter. Graphic letterhead can be made available by going to FirePro 2 → Set-up Menu → Custom Settings Button → "Other" Tab → Graphic Letterhead.