Instructions to build a custom letter with inserted fields

The following is using the custom letter feature found under Reports | Letters. This can be used for delinquency letters and political action letters.

The standard letter feature allows the user to write standard wording using the Edit Text memo field.
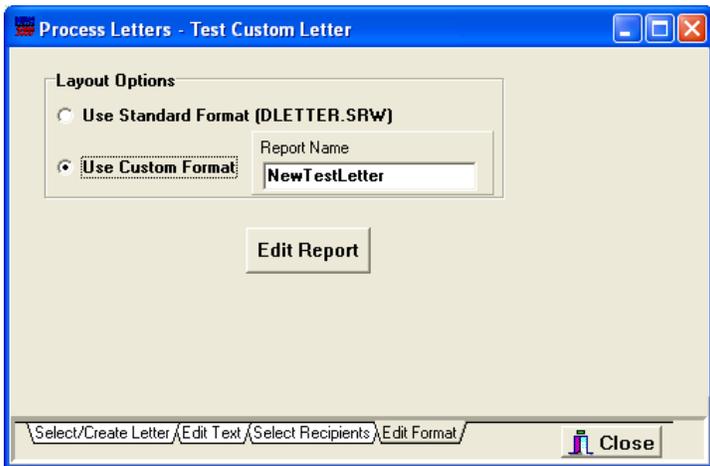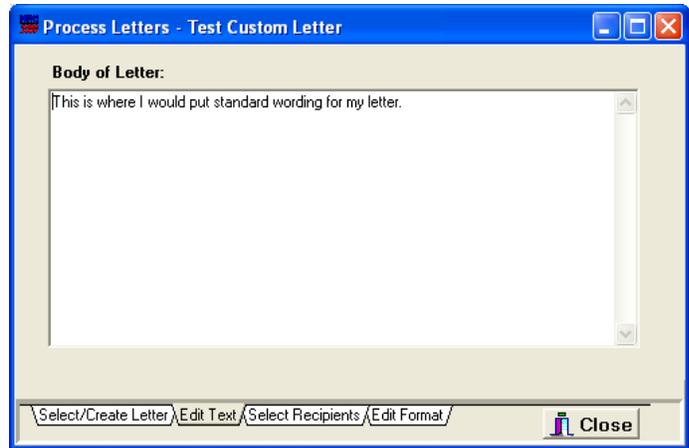
This can be used in the default letter "DLETTER.SRW" or create a new letter from the default to customize.

Once you enter a new name in Report Name area the program will duplicate the DLETTER.SRW format and open up the report writer for changes. This report format will then be used when you Select the Title of the custom report

If, however, you wish to use fields from within a member's record in the body of the letter, then you need to Edit the custom report you created and do the following:

Step #1: Add the fields you wish to use with Query Tab.

In this example we added LastName and PaidThruDate:

Fields are added by double clicking the name in the MEMBER list.
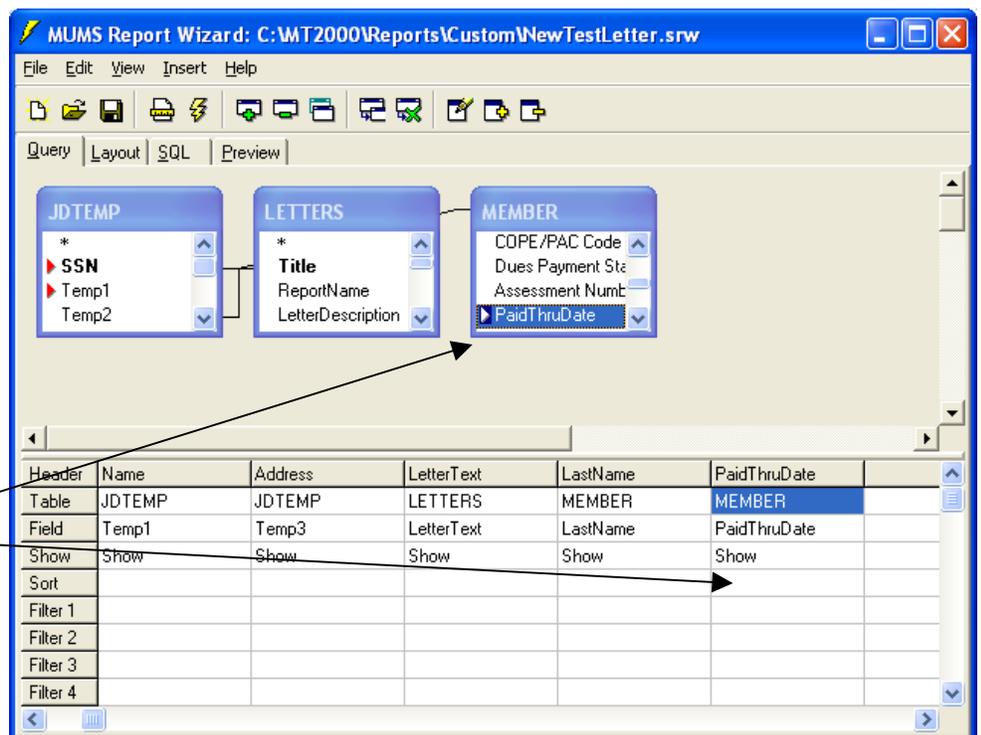
Step #2: Modify Text Area using the Layout Tab.

To edit the letter, right click on [LetterText] then click on "Edit Caption"

Note you can change other information in this format such as heading information. In fact besure to modify the default signature block before saving.

MUMS Report Wizard: C:\MT2000\Reports\Custom\NewTestLetter.srw

File   Edit   View   Insert   Help

MS Sans Serif   10   B I U

Query Layout SQL Preview

[Name]   12/31
[Address]

Dear Brother / Sister,

[LetterText]

Arrange Sections
Place Objects
Customize Objects
Edit Caption

Cut
Copy
Paste
Clear
Select All

Report Setup

Detail 0

Page Designer

Arrange | Place | Customize

LetterText

[LetterText]

Properties \ Caption
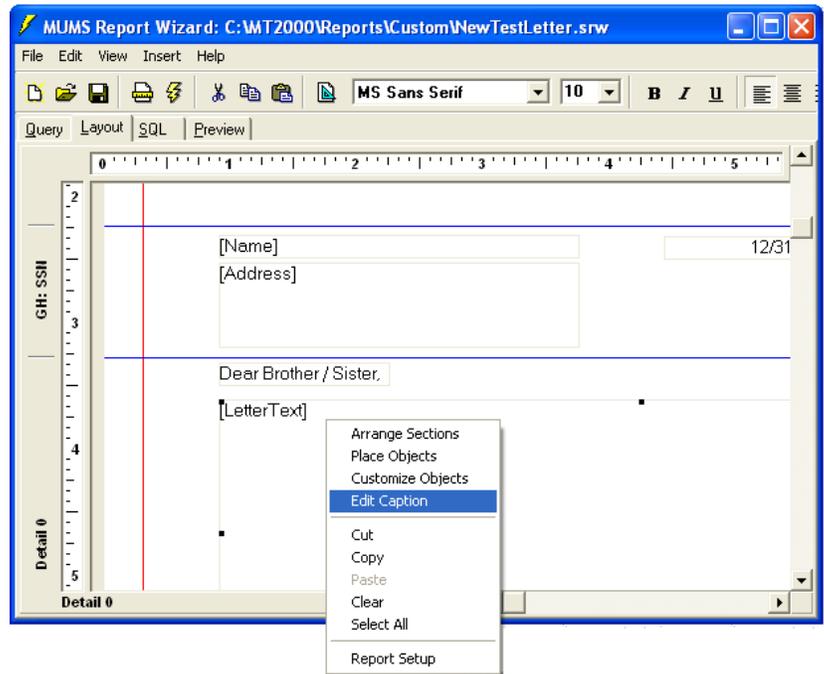
In this Page Designer screen, you can leave the [LetterText] field there if you have data entered in the "Edit Text" memo field shown previously. If you are creating all of the text in this screen with your own member fields, then delete [LetterText] field

If you want to use custom data from a member, you can insert your own wording before or after the [LetterText] field. Just treat this field as a set of fixed words. **NOTE you must make the Page Designer full width of your screen or the words will not wrap correctly.**

Page Designer

Arrange | Place | Customize

LetterText

Your Last Name = [LastName]

[LetterText]

Your Paid Thru Date = [PaidThruDate]

Properties \ Caption

In this text memo area you can insert any wording you want in addition or replacement of the [LetterText] that is generated by the Edit Text tab on the previous screen. To insert the data from a member's record just use the field name you added in Step #1 with brackets around it.

Your Last Name = Van Elgort

This is where I would put standard wording for my letter.

Your Paid Thru Date = 01/01/1998

Here is an example of the results.

Additional Notes:

How to add # months delinquent to your letter.

Add the Field TempInteger1 from the JDTEMP table
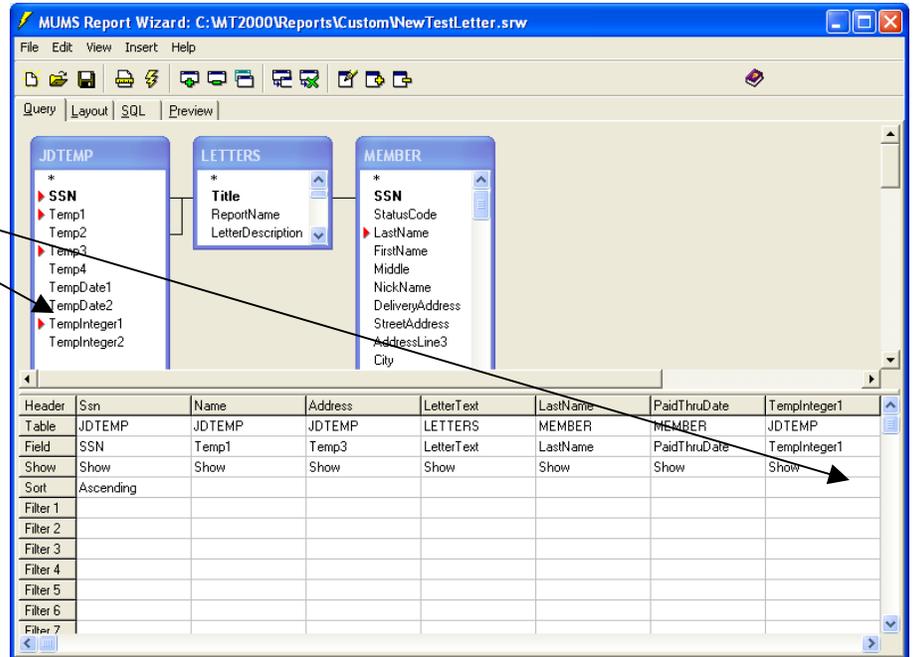
Then you can use this in the letter by using [TempInteger1]…
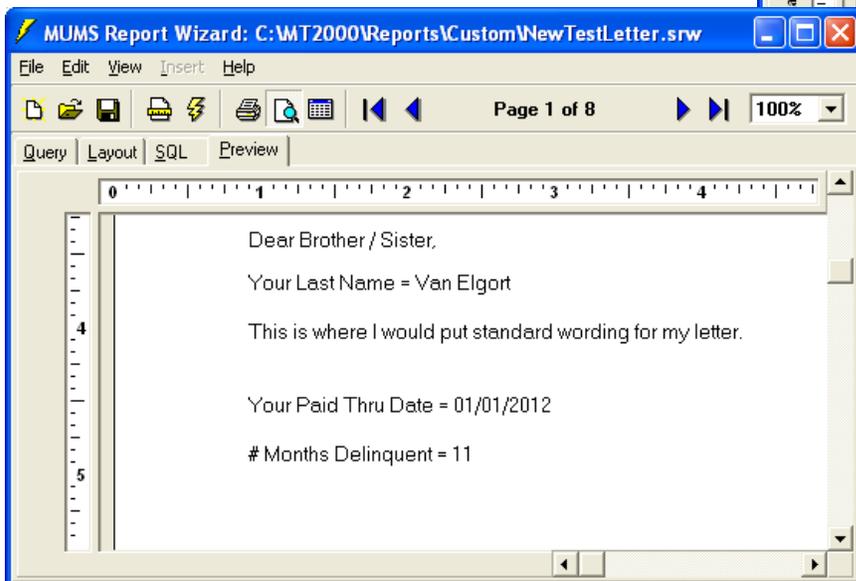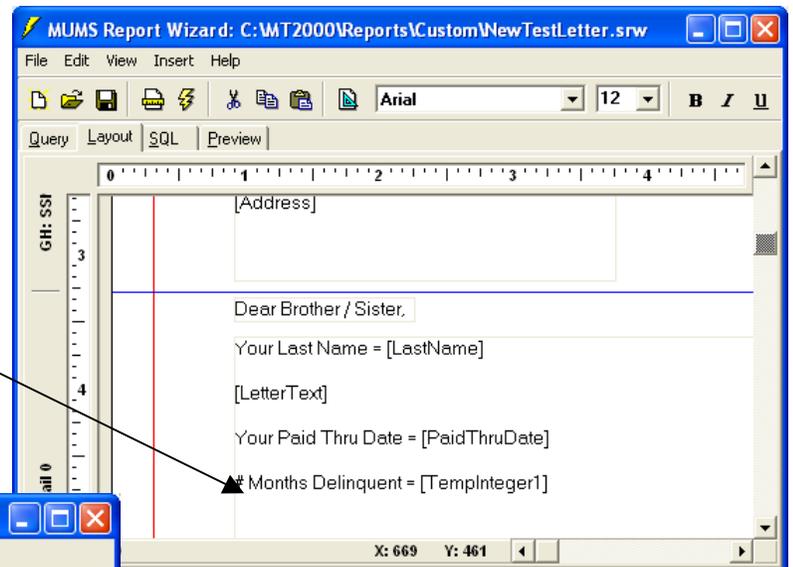
This shows the results.

How to use # Months to Calculate Total Dues

In this example we are going to setup a custom field that is # months delinquent times the member's individual payment amount.

First we add "Individual Payment" from the Member Table

Next we are going to double click into a blank column to create a new custom field
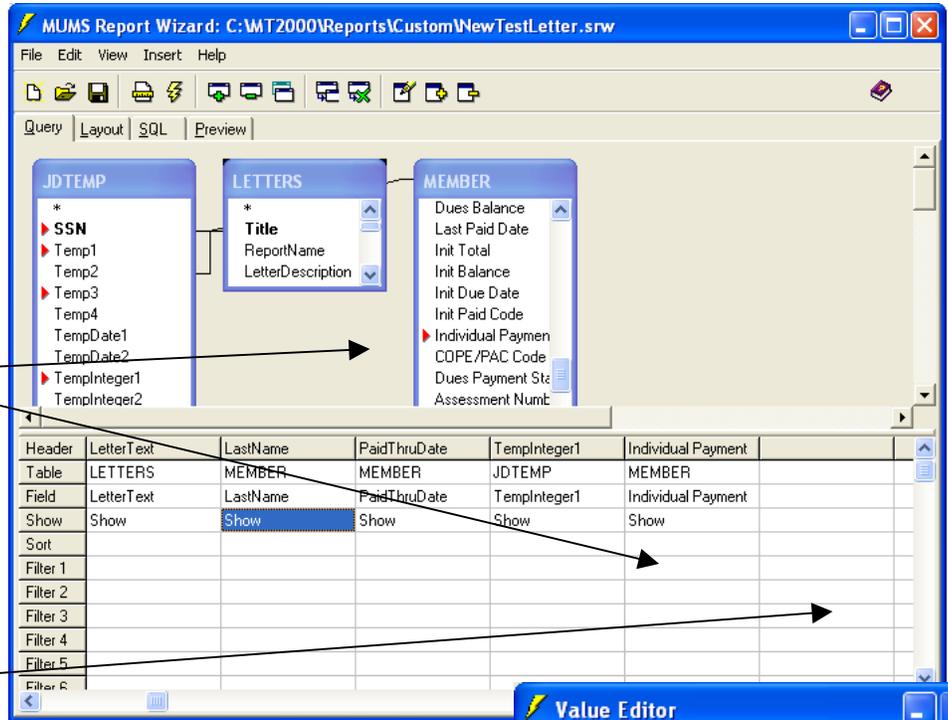
This will bring up the "Value Editor" and in this form you will enter the formula you see here
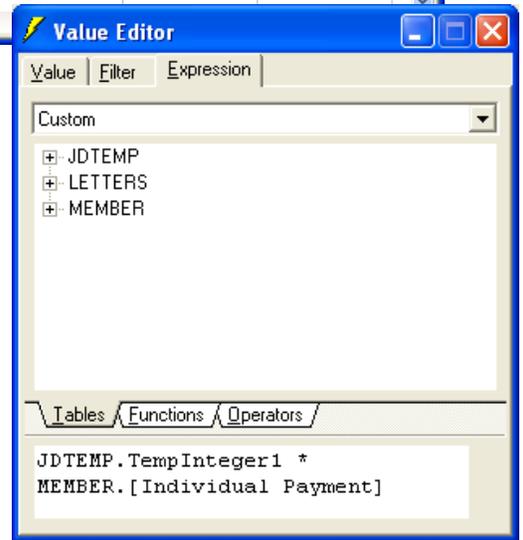
Then you can use this new field called [Custom] in your letter to show Total due.

Results: