



Don't let QuickBooks's letter templates limit you



AT A GLANCE

QuickBooks offers many letter templates to use in mail merges with Microsoft Word, but the application simply can't anticipate every business scenario for every industry. Instead of trying to edit an existing template so that it conveys the message you want to customers, vendors or employees, create your own letter template from scratch.

To create a new letter template instead of modifying an existing template, we'll:

- Formulate a plan for what we want to include in the letter template for future mail merges.
- Access the Letters And Envelopes wizard to create the new letter template.
- Write the text of the letter template inserting merge fields in place of customer, vendor or employee information that will change with each letter.
- Insert a company logo to give the letter a professional touch.

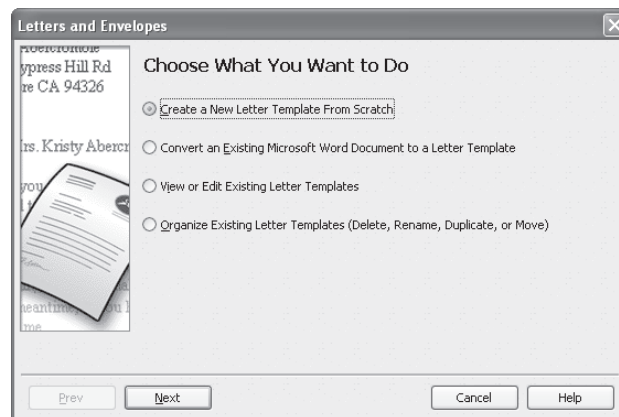
You know the old saying, "If you want something done right, you'll have to do it yourself." There are some cases when none of QuickBooks's existing letter templates applies to your business situation. You could modify the template that most closely matches your needs, but this can be more time-consuming than you'd expect. Instead, we'll show you how to create a letter template from the beginning — along with a few tricks for making it professional and personal so you leave your recipients with a great impression.

Determine what you need from the letter

Before you start writing a letter template from scratch, you should make sure that none of the letter templates in your company file make the grade. Then you need to answer a few important questions:

- What is your letter trying to say and who will receive it?
- What personalized customer, vendor or employee information do you need to include?
- How can you make your letter both professional and memorable?

For our example, let's suppose we want to remind our customers that if they refer a new customer to do business with us, both the customer and the referral will receive a 25 percent discount on their next purchase. We want this letter to double as a proof of reference, so that the customer can give it to the person he



1: When you create a new letter template, you have complete control over how it looks and what data it includes.



I have expertise and experience with small business owners and non-profit organizations, setting up and maintaining their books, assessing problems and implementing appropriate solutions. Since obtaining my CPA license in 1989, I have had opportunities to work with many different segments and industries. My specialty is helping small and start-up companies as they begin and grow their operations.



refers, who in turn gives it to us to earn the discount for both parties.

Build the foundation for your letter template

Once you know what you want, it's time to get to work. You can build new letter templates through the Letters And Envelopes wizard.

To create a letter template from scratch:

1. Launch QuickBooks and open your company file. Alternatively, you can open the sample company file for Carl's Computer Shop to follow along with us.
2. Choose Company | Prepare Letters And Envelopes | Customize Letter Templates to open the Letters And Envelopes Wizard.
3. Select the Create A New Letter Template From Scratch option button, as shown in **Figure 1** and click Next.
4. Select the Customer option button since we plan to distribute our letter to names on the Customer list.
5. Enter *Referral Discount* in the Name The Letter Template text box, as shown in **Figure 2**.
6. Click Next to open the new letter template in a blank Microsoft Word document.

The Word document opens with a custom toolbar that includes two dropdown buttons — one for My Company merge fields and one for Customer Name fields. This is based on the letter type we chose in the wizard.

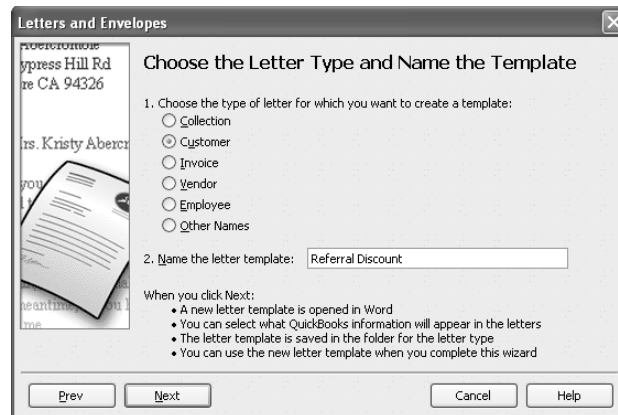
To create the letter's text and insert merge fields:

1. Click the Insert My Company Fields button and choose Date Letter Was Created from the resulting dropdown list. Press [Enter] twice.
2. Create the return address block by inserting your company's name, address block, phone number and

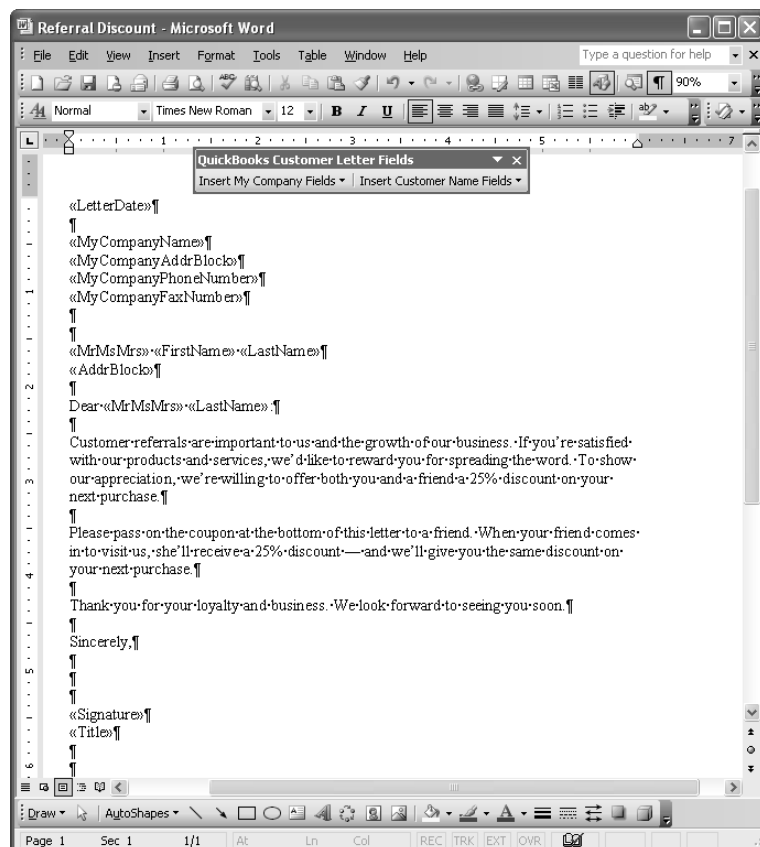
fax number, as shown in **Figure 3**. (To insert a merge field, select it from either the Insert My Company Fields dropdown list or the Insert Customer Name Fields dropdown list.)

3. Press [Enter] three times and then repeat step 1, except enter the customer's name and address.

4. Type the body of the letter. If you refer to information that changes with each customer letter, such as an open balance or credit limit, insert the relevant merge field.
5. Click the Save button on the Standard toolbar in Word to save the letter template.



2: The letter type you choose determines the folder where QuickBooks stores the letter template.



3: If you want customer-specific data to change from letter to letter, use a mail merge field.

Design a coupon to identify the customer

We want to use our letter to encourage customers to bring in a friend and boost company growth. So, the letter will include a “coupon” at the bottom — something you won’t find in any of QuickBooks’s letter templates. Let’s create the coupon with information about the customer so we can easily identify and record who referred the new customer.

To create the coupon in your letter template:

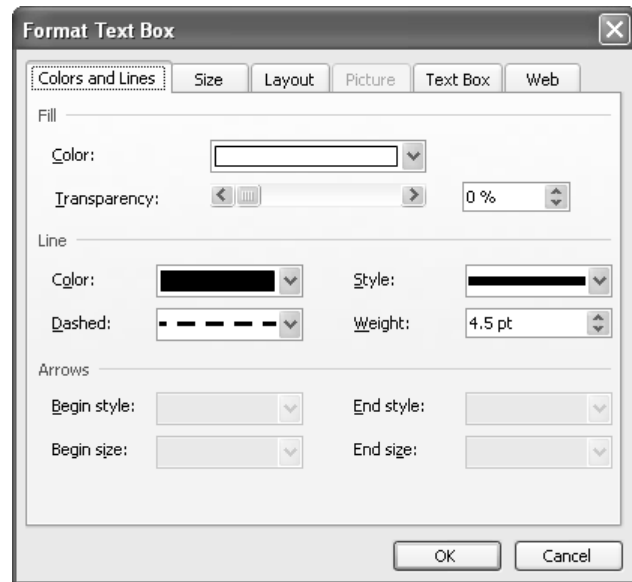
1. In Word, ensure that the Drawing toolbar is displayed by choosing View | Toolbars | Drawing from the menu bar. (If there’s a check box beside the Drawing option, it’s already displayed.)
2. Click the Text Box button on the Drawing toolbar and then click and drag a box in the bottom half of your letter.
3. Right-click on the box border and choose Format Text Box from the resulting shortcut menu to display the Format Text Box dialog box.
4. Click on the Colors And Lines tab, if necessary and choose a dashed line style from the Dashed dropdown list in the Line panel.
5. Select 4.5 pt from the Weight dropdown list in the Line panel, as shown in **Figure 4**.
6. Click OK to apply the changes. Your text box now has a border that simulates a cut-out coupon.
7. Enter the text you want to display in the coupon, inserting merge fields when necessary. Make sure you include information to identify the customer to whom you sent the letter.

When you’re finished, your coupon should look similar to ours, as shown in **Figure 5**.

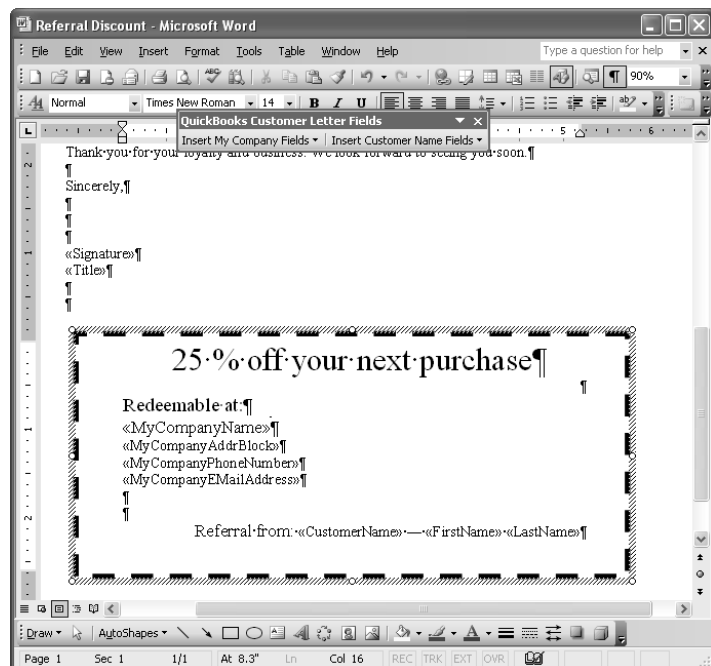
Add a company logo to the letter template

Nothing personalizes a company letter like the logo. Many clients make a quick visual association with your company if

they’re consistently exposed to your logo. This type of branding is vital for company recognition and company growth. You can quickly insert your logo in your letter template if you have it saved on your hard drive as an image.



4: You can change the text box’s border to simulate a cut-out coupon.



5: Your coupon helps show your appreciation for your customers and helps you gain new customers.

Great idea: You may want to include two logos in your letter template — one in the letter header and one on the coupon. This way, even when the customer cuts out the coupon, your logo is still visible.

To insert a logo in your letter template:

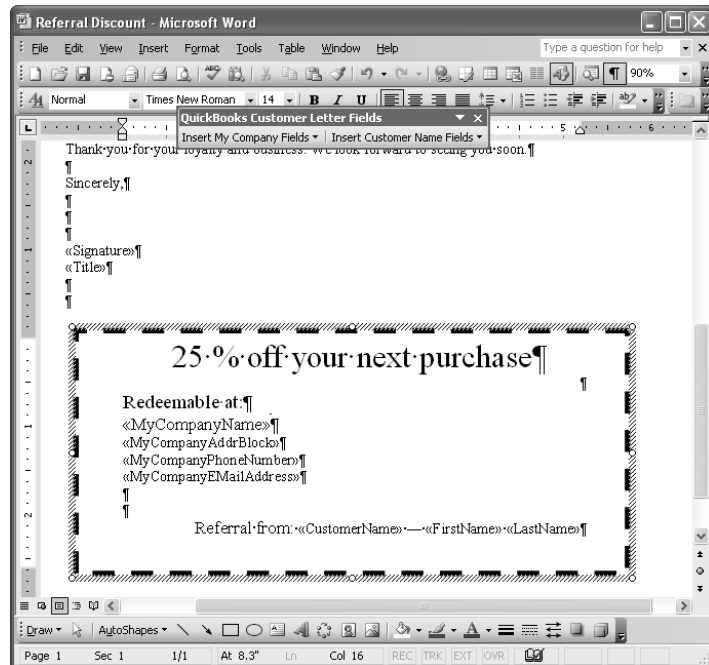
1. Click on the Insert My Company Fields button and select Insert My Company Logo from the resulting dropdown list.
2. Navigate to the image file that contains your logo in the Insert Picture dialog box, as shown in **Figure 6** and click Insert.
3. Select the image and click the Text Box icon on the Drawing toolbar. (If the Drawing toolbar isn't displayed, just choose View | Toolbars | Drawing from the menu bar.) This forces text to flow around the image instead of the image interrupting your letter's text.
4. Click and drag the image to the correct placement in the letter template.

Expert tip: By default, text box objects have a border. If you don't want the border around your image, just right-click on the text box's border and choose Format Text Box from the resulting dropdown menu. Then, in the Format Text Box dialog box, select the Colors And Lines tab. In the Lines panel, choose No Lines from the Color dropdown palette and click OK.

Save the template and put it to use

When you're ready to save the template, simply click the Save icon on Word's Standard toolbar. Then, close Word and return to QuickBooks. You'll see that the Letters And Envelopes Wizard's

final screen includes a Use Template button. If you want to use the new letter template right away, click this button. Otherwise, you can click Cancel. Your letter template is now available with the other letters of the same letter type. For instance, our template is stored with the Customer letters.



6: You can insert your company logo to give a letter template your personal touch.

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