

Support Webinar Letter Templates

Agenda

- Letter Templates Overview
- Benefits of Letter Templates
- When to use Letter Templates
- Prep Work: Setting yourself up for success
- Letter Template files in MS Word
- Generating Letters from the akoyaGO
- Troubleshooting Tips & Tricks

Where Can I Find Additional Related Resources?

<https://gosupport.powerappsportals.com>

[KA: Generating Letters in CRM](#)

- Most up-to-date documentation
- Recording of this Session



What are Letter Templates?

A way to create documents in bulk from your akoyaGO CRM

Dynamically inserts data from associated records

Batch printing PDF for mailings

Autosaves to related records in akoyaGO

Uses a template set up in Microsoft Word

Examples of Letter Templates

Gift Acknowledgements/Thank you letters

Grant Award/Denial notices

Grant Agreements

Scholarship Notifications

Letters to fundholders

And many more!

Alternative Options to Letter Templates

Manual Letter Generation

- Time consuming
- Does not automatically attach to record in CRM

Mail Merge (traditional)

- Time consuming
- Leaves ample room for user errors
- Does not automatically attach to record in CRM

Document Templates

- Functions for one-off letter generation, does not support bulk letters
- Does not automatically attach to record in CRM

Customized Cloud Flows Created by Tech Services

May contain additional features that are not currently possible using the Letter Templates entity

- If this is the case, then please continue to utilize these for the letters you are generating that require those additional features.

Benefits of utilizing Letter Templates when you don't need those extra features

- Easier to add dynamic content into letters
- Cloud flows make it more difficult to adjust the language in your letters
- Easier to maintain yourself
- Easier for akoyaGO staff to troubleshoot and support (can be supported by any tier)

Benefits of Letter Templates

Support

- Directly supported by all 3 tiers of Support
- Quicker response time
- Faster bug fixes

Maintain

- Easier to add dynamic content
- Easier to adjust language in template
- Ability to bulk print

Prep Work: Setting yourself up for success

Set System Views

- Create new system views
- Establish which existing views to utilize

Folder Setup

- Establish Shared Document Location
- Only “approved” letters in the agreed upon location

Naming Convention

- Agree on naming convention for Letter Template Files
- Ex: (Entity)_(View)
 - Gift Payment_Awards to be Notified

Letter Templates in MS Word

Create new document in MS Word

- Format document

Highlight dynamic content.

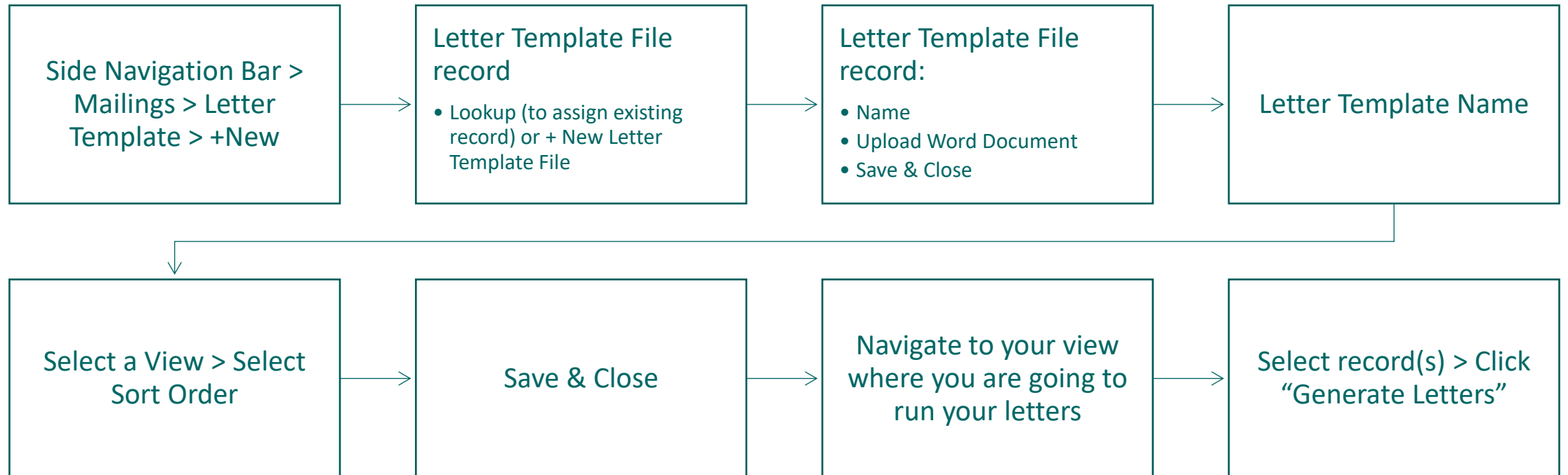
- Insert > Quick Parts > Merge Field

Insert “Field Name”

- **Must** be an **exact match** to the column in the system view.

Proofread and save document

Generating Letters in akoyaGO CRM



Letter Template Demo

- Set up Letter Template Request - Denied to be Notified
- Generate Letters
 - From Denied to be Notified
 - From another System View

Troubleshooting

Views

- When generating letters from a view, make sure you are using the same view you specified in the “Select a View” field on the Letter Template record.
- If the associated record (Constituent, Contact, Donor, Payment, etc.) does not exist in your selected view, you will receive an ERROR

Timeline

- Each letter that is generated is logged as an activity in the Timeline of the Letter Template Session.
- Any record(s) that did not successfully generate letters will be marked in the timeline and can be identified by the GUID.

Thank you!

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