

Letter Templates and Types

VSys Webinar – June 2012

Letter Templates

Letter templates are the documents which VSys merges together with information about your people to produce letters. They are identical in concept to mail merge documents in Microsoft Word. Write your letter and include merge fields which are then replaced with each person's data to create the individual letters.

Letter Types

Every letter has a letter type. These let you categorize your letters and group them by what is being communicated. Letter types also dictate what options are available for merging (or sub reports); Awards, Mandates, Job assignments, Reference checks.

How to find a starting letter templates

- Add letter template - Creates a new, blank template.
- Load built-in templates - Brings up a list of the sample templates which are built into VSys One. These can act as a starting point for your own templates, and you can hide those which are not useful to you.
- Load from a file - Loads a saved template from disk, usually one sent by another VSys user.
- Copy – On the right-click menu, copies an existing letter template.

Actual letter templates

- Insert fields – Data fields bring the information in VSys into your letter
- Subletters - Sub-letters are like detail reports: for each matching detail record, they'll be included once. These are most commonly used to detail a person's assignments, upcoming trainings, or account records.
- Attachments - Define your attachments in the E-mail Attachments tool from the E-mails and SMS messages panel.

Note: Once an attachment is set up here, VSys no longer uses the file on your disk. Instead it works from the copy that it saved to its database. If you've made a change to the disk file and want VSys to use the updated one, edit the attachment and click the Replace link to update it. VSys will not let you include any attachments which appear to be Windows executable files, even if they don't have a .exe or .dll extension on them.

Letter properties

Letter Template Properties - Use this to define the data about a letter, rather than its contents.

- Letter type
- Alternate Language Variants
- Data source
- Attachments
- RSVP
- Status of newly-merged letters - Delayed
- Preferred sending method(s)