

How Do I...

Change my Envelopes and Letters?

Problem

I have a Thank You letter and envelope that are using the Salutation instead of Label name. In addition, I'd like to update my letter with a new message.

Solution

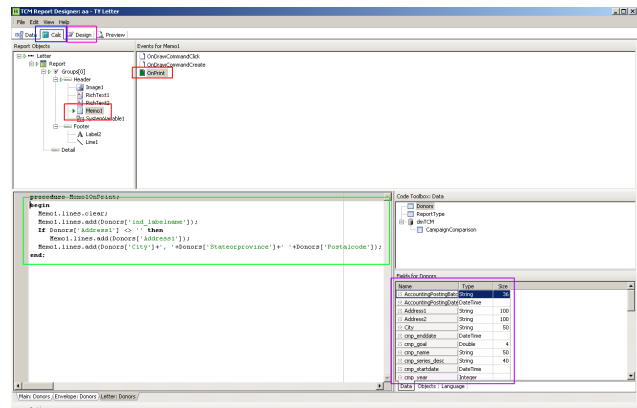
By modifying a simple formula, we can change the envelope to use any field we like. In addition, we can update the letter to use new text and even additional TCM fields.

Process

Changing the text on my Envelope

Envelopes use Memo Boxes to display name and address. The information is built using a formula.

1. In the report, click on the Calc tab [BLUE].
2. Find a field called Memo 1 [RED] and the event called *OnPrint* [RED]. Upon clicking on *OnPrint*, it will show a formula [GREEN].



While the formula contents may be different depending on the letter and envelope, it will look something like this:

```
begin
  Memo1.lines.clear;
  Memo1.lines.add(Donors['ind_salutation']);
  If Donors['Address1'] <> '' then
    Memo1.lines.add(Donors['Address1']);
  Memo1.lines.add(Donors['City']+', '+Donors['State']+ ' '+Donors['Zip']);
end;
```

3. In this example, LabelName should be used instead of Salutation, on the third line of the example formula, ind_salutation is entered. This represents the current Salutation.
4. To change the field, simply type in the desired field. The values on the right hand side [PURPLE] of the screen represent the available fields. In this example, the third line will look like this:

```
Memo1.lines.add(Donors['ind_labelname']);
```

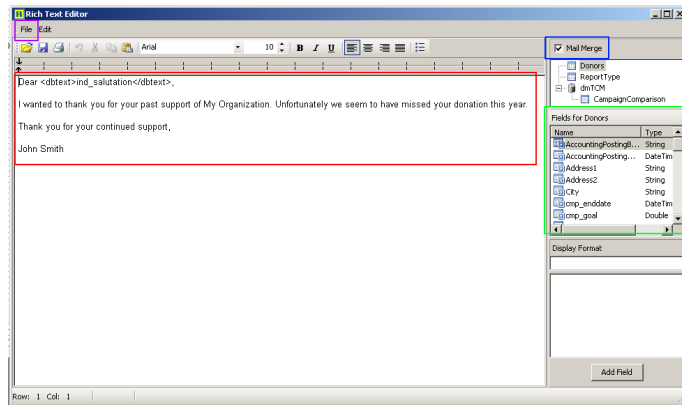
DONORS represents the dataset. The square brackets and single quotes enclose the field name. These are required for the process to know that *ind_labelname* is a dataset field.

5. Return to the Design tab [PINK] and then the Preview tab to see the new addressee.

How Do I...

Changing the Letter

RichText Boxes are multi-line text boxes that store Rich Text. Rich Text is a standard that allows formatting as well as fields to be stored and presented in-line in a larger format than a traditional field would allow. In this sample, the Rich Text Editor looks similar to a small word processor. The Rich Text standard actually started as a word processor engine 30 years ago. At this point the format is relegated to small universal files, but since it is a small lightweight format it's also used in situations like this.



1. Right click on the letter and choose *Edit*.
2. Edit the text [RED] as desired.
 - a. The letter can be treated as a "Mail Merge". From the right side of the screen, fields can be added. To add them, the Mail Merge check box [BLUE] on the top right of the screen should be checked.
 - b. Once checked, double click or type fields [GREEN] into the text.
 - c. The example above shows:

Dear <dbtext>Ind Salutation</dbtext>,

When the report is printed, the text in the letter will show:

Dear Mr. and Mrs. John Smith,

3. Once the letter is complete, go to *File, Close* and then *Save* [PURPLE]. Instead of saving to file, it will save into the main report.

In the letter to the left, there are two RichText boxes [RED] and a Memo box [BLUE] similar to a Memo found on an envelope.

