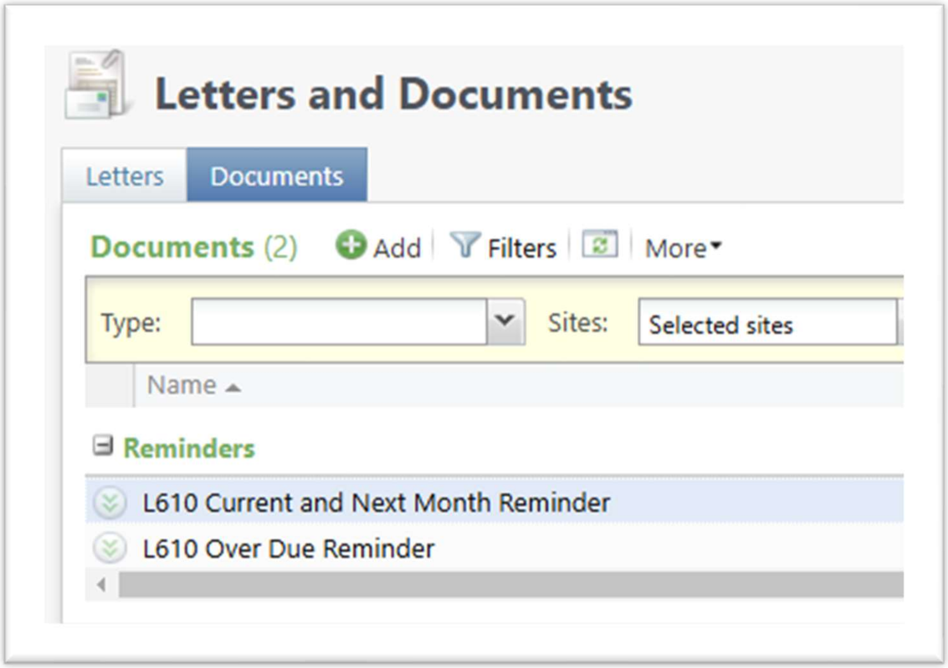
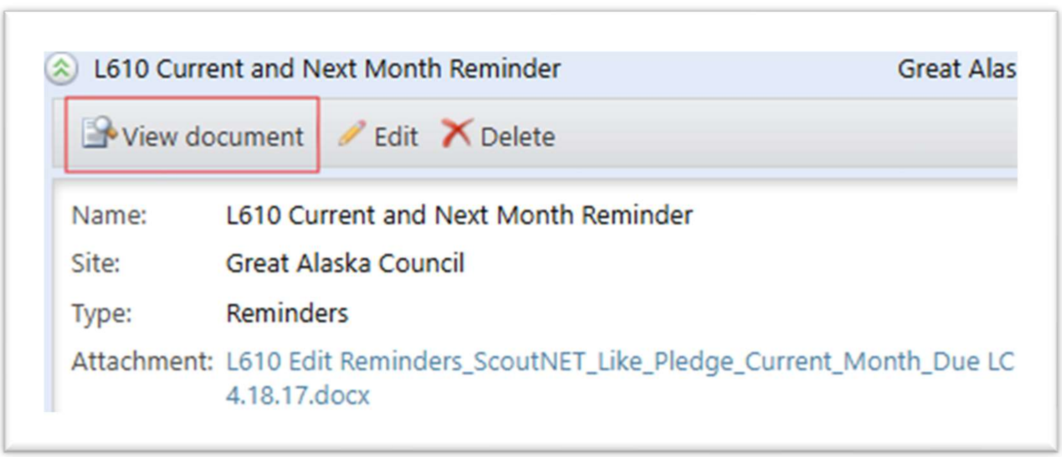
## Updating Reminder and Thank You templates

## Created December 13, 2024

<table>
<tr><td>1.</td><td>Reminder templates can be updated by you. This may need to be done if contact information changes or you want to change the design of the template</td></tr>
<tr><td>2.</td><td>Original templates are available to download from Letters and Documents in CRM.</td></tr>
<tr><td>3.</td><td>To find your original templates navigate to:<br>Marketing & Communications \ Packages \ Letters and Documents \ View Letters and Documents \ Documents tab<br>


</td></tr>
<tr><td>4.</td><td>Drop the chevron and click view document. This will download the reminder template in Microsoft Word. You can save it to your desktop and make changes so that you can update your reminder.<br>


</td></tr>
<tr><td>5.</td><td>You have two templates. One is used with the overdue processes the other is use with current month and next month bills.</td></tr>
<tr><td>6.</td><td>To update your reminder, navigate to your reminders.<br>Marketing & Communications \ Donor Relations \ Reminders \ Reminders tab.</td></tr>
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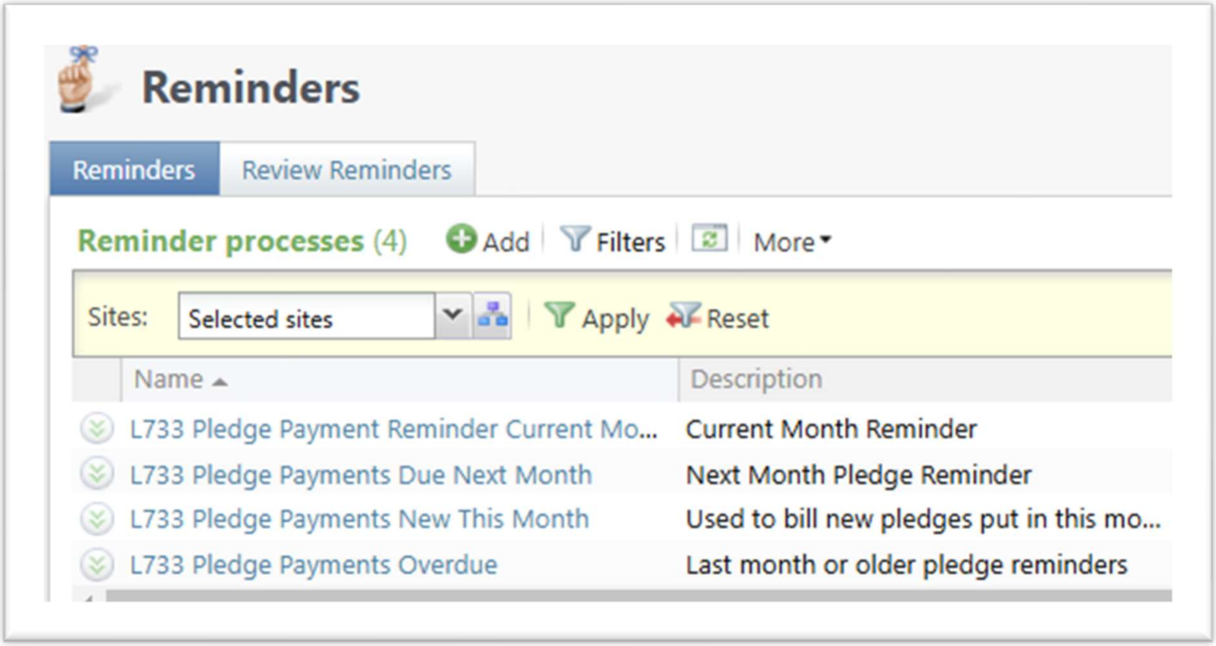
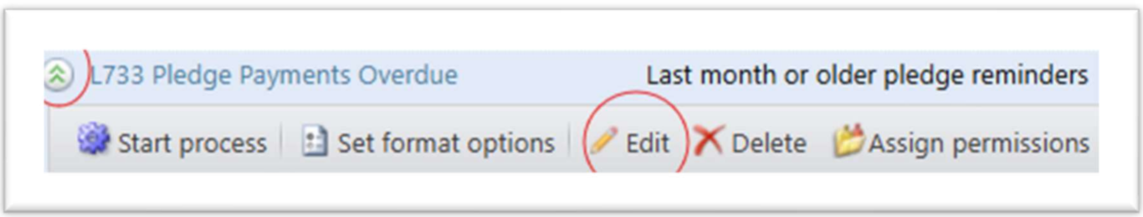
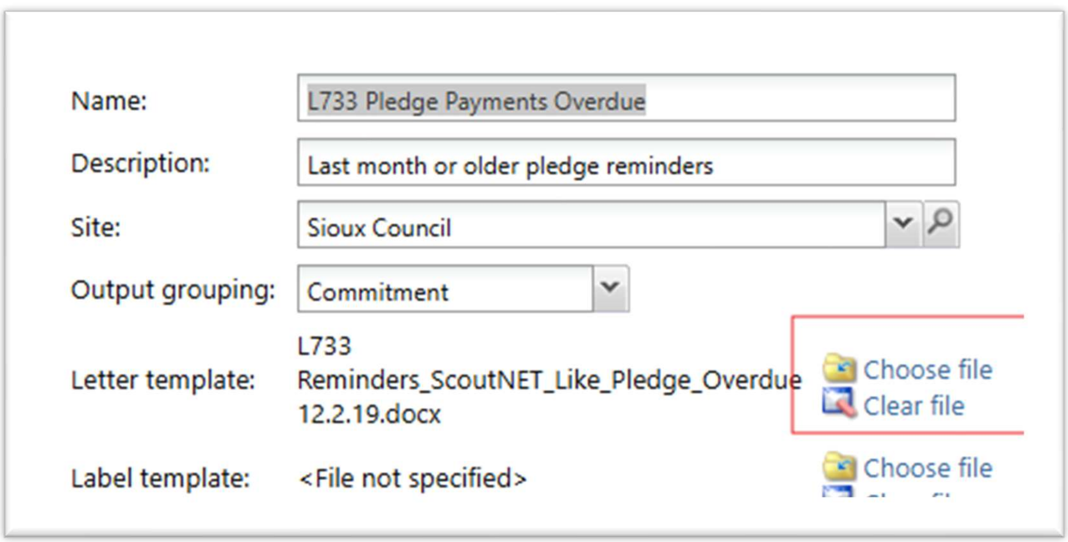
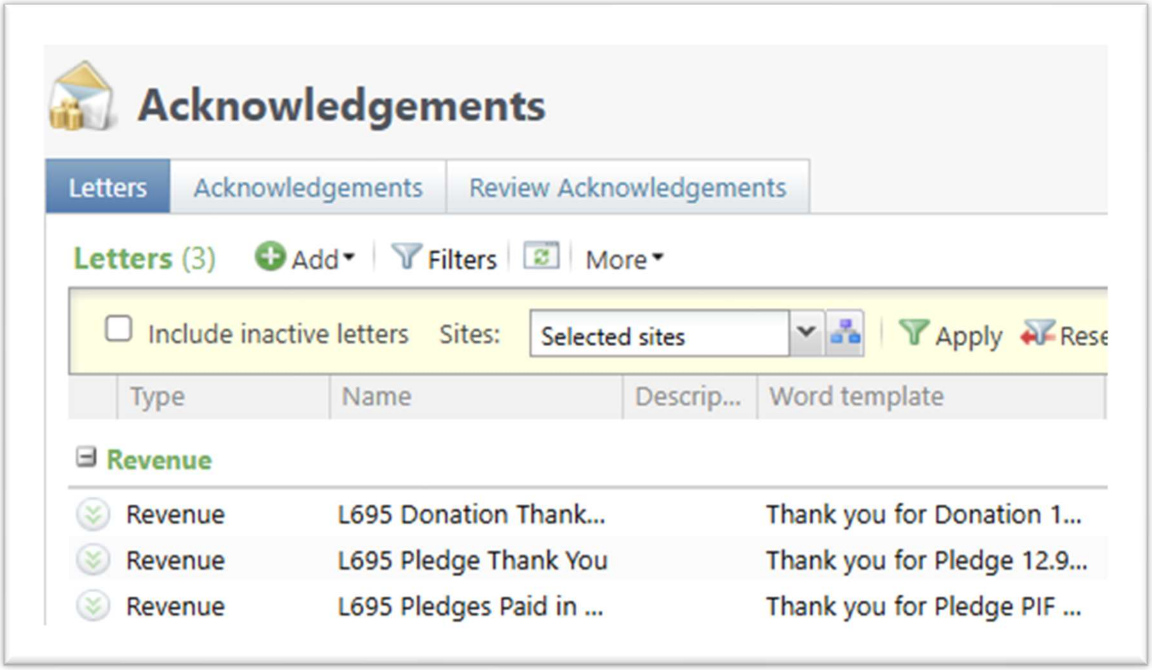
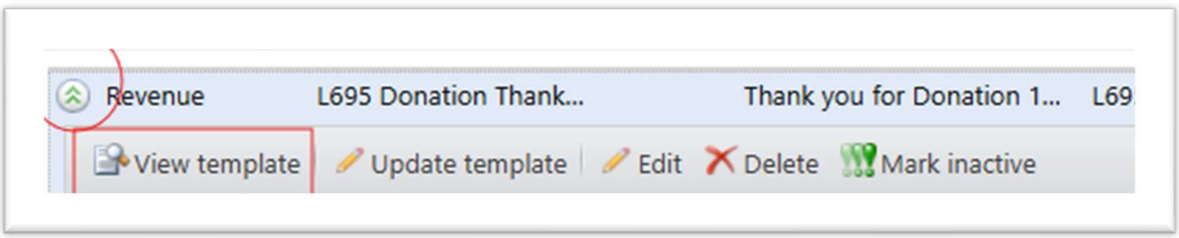
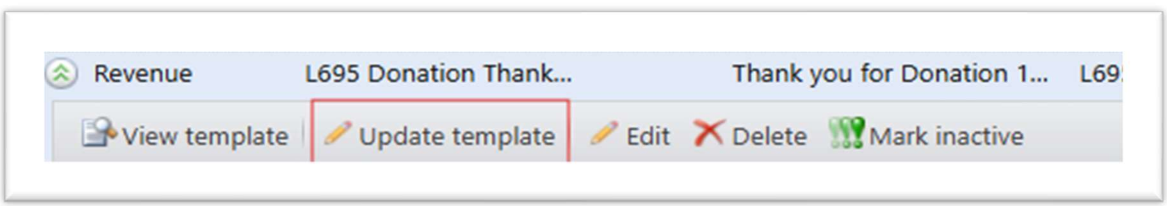
<table>
<tr><td></td><td>
</td></tr>
<tr><td>7.</td><td>Drop the chevron on the reminder process you need to update and click edit.

</td></tr>
<tr><td>8.</td><td>When the Edit process form opens, find the letter template area and click clear file and then click choose file.

</td></tr>
<tr><td>9.</td><td>The choose file will open the folder explorer so that you can find your updated reminder template on your computer and uploaded it into your reminder process.</td></tr>
<tr><td>10.</td><td>Once the template is uploaded, click the save button and the process is completed.</td></tr>
<tr><td>11.</td><td>Return to the documents area and edit our document where you downloaded your template. Clear the old template and upload your new version so the next employee that needs to update it can find the correct template to change.</td></tr>
<tr><td>12.</td><td>To update an acknowledgement process you will need to proceed to:<br>Marketing & Communication \ Donor Relations \ Acknowledgements l Letters Tab</td></tr>
</table>



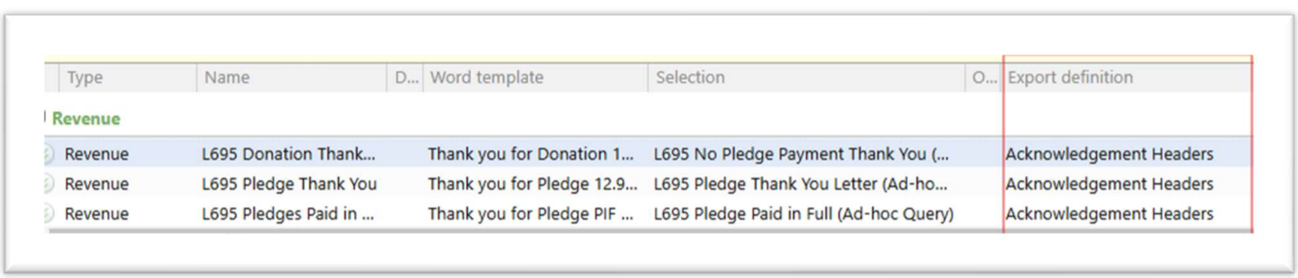

13. Drop the chevron and view your template to download a copy so that you can make whatever revisions are needed.



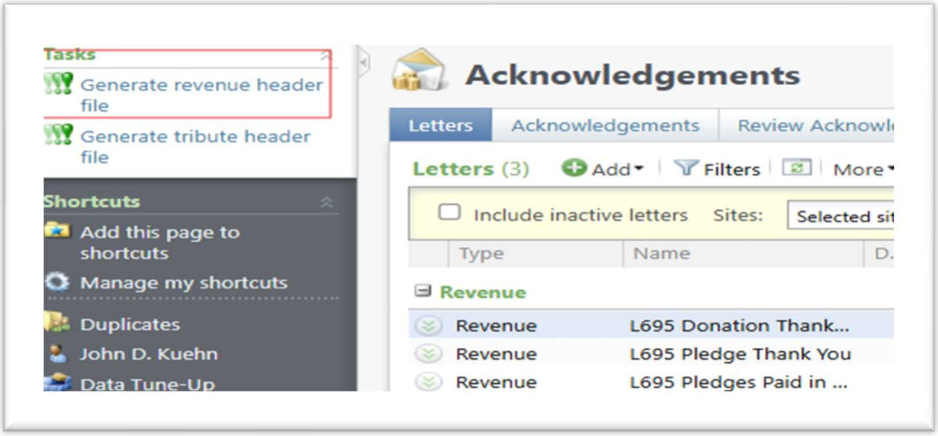
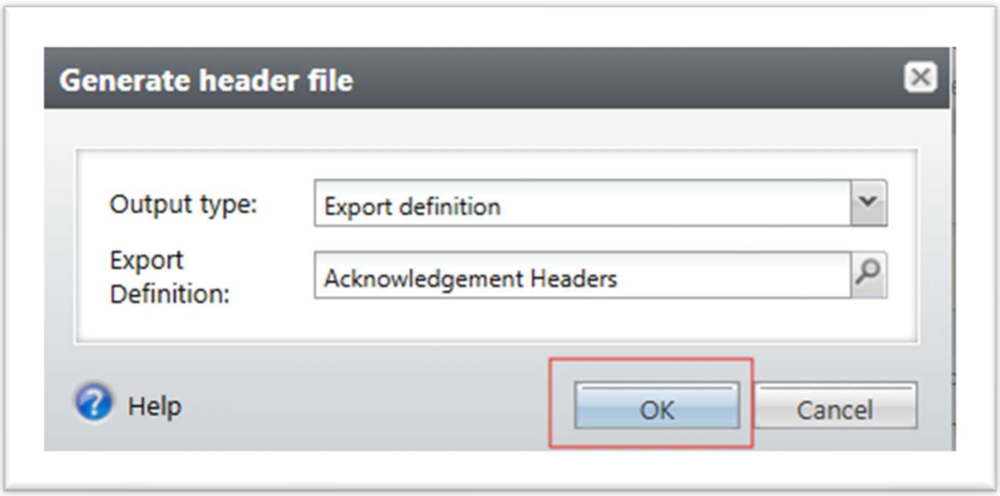

14. When rewording your template be mindful to keep the same merge field. Once updated, save to your desktop and then click Update Template and find your saved template and click save to upload it.




15. If you plan to create a new letter from scratch, review your current letter to see which Headers you use in the mail merge. This can be seen on the letter line under export definition. Most letters are set to use the Acknowledgement Headers.




16. To get the header file. Click Generate Revenue headers under task on the left-hand side of the screen.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>17.</td><td>This will open the Generate Header File box. In the output type select “Export Definition” and in the Export Definition field search for “Acknowledgement Headers”. Then click OK. This will download the file.<br>
</td></tr>
<tr><td>18.</td><td>The excel file created can be saved to your desktop and then you can connect your letter to it via select recipients under the mailing options. Once connected to the file, you can insert the correct merge fields into your word document.</td></tr>
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