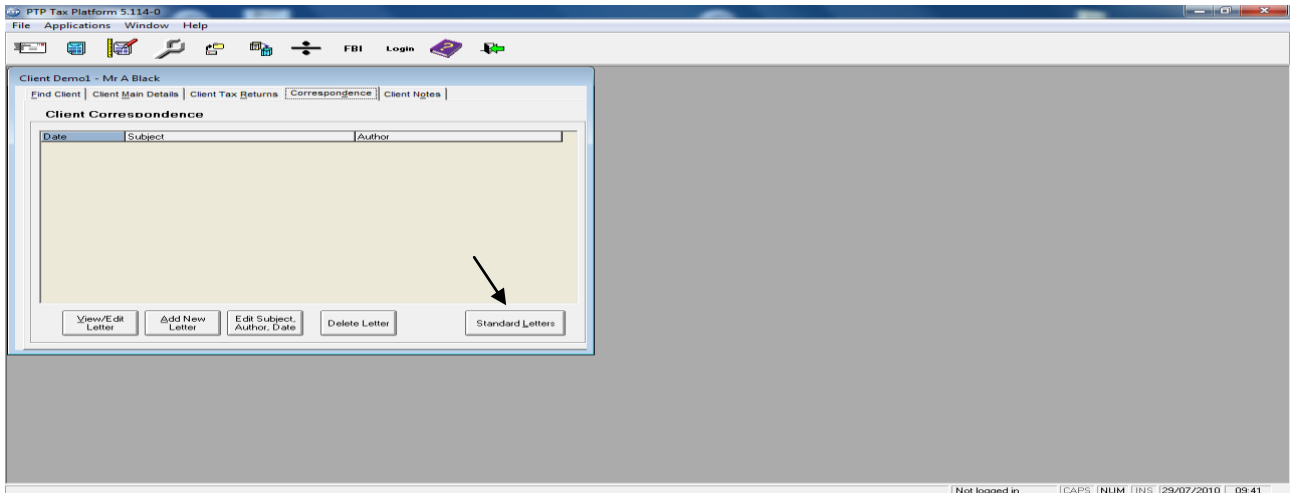


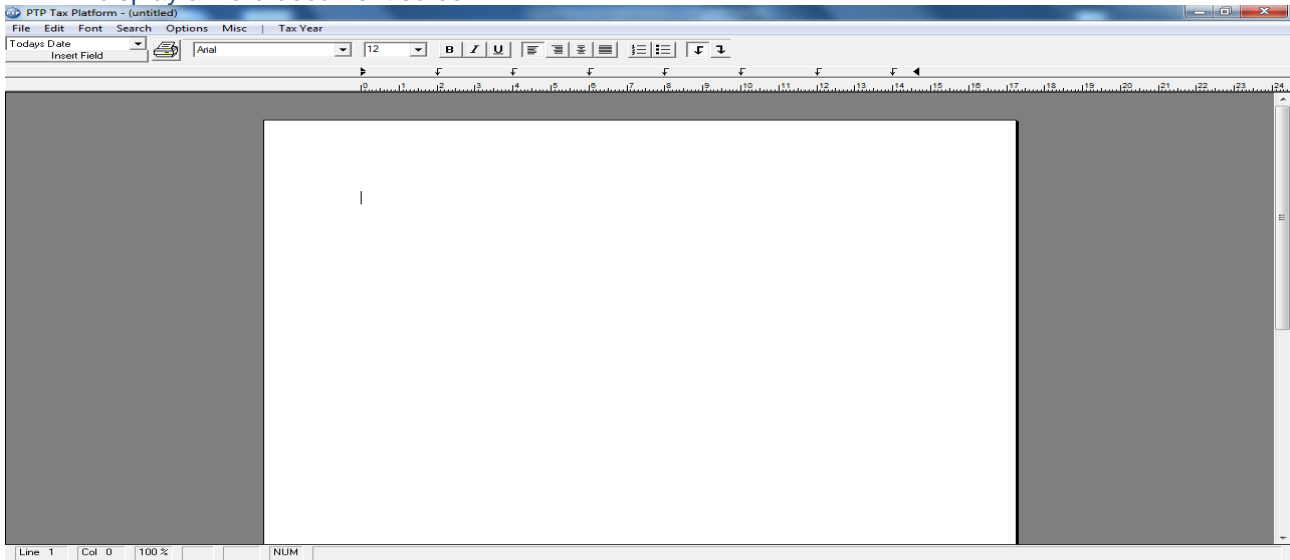
Creating Standard Letters and Mail Merge

Step 1 – Creating the Standard Letter

- Launch Tax Platform and click the correspondence tab

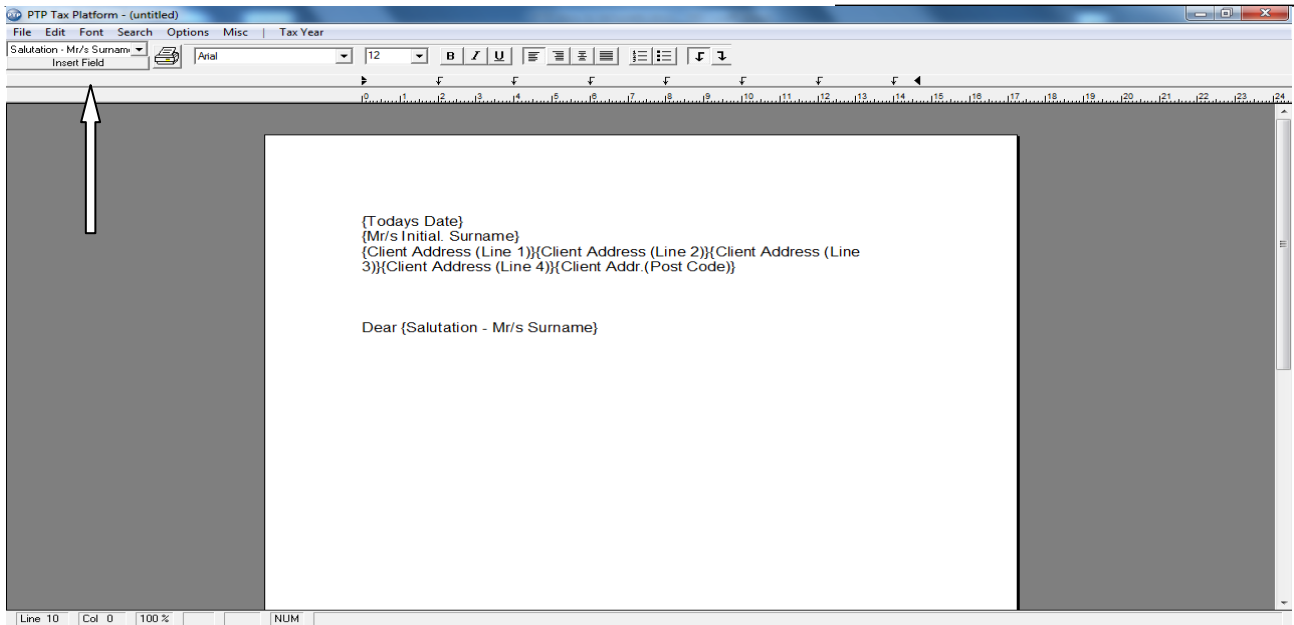


- Once this is selected you need to click the Standard Letter option on the right hand corner of the screen
- Click Add new Letter and enter a date, subject and an author and then click onto OK and this will display a word document screen

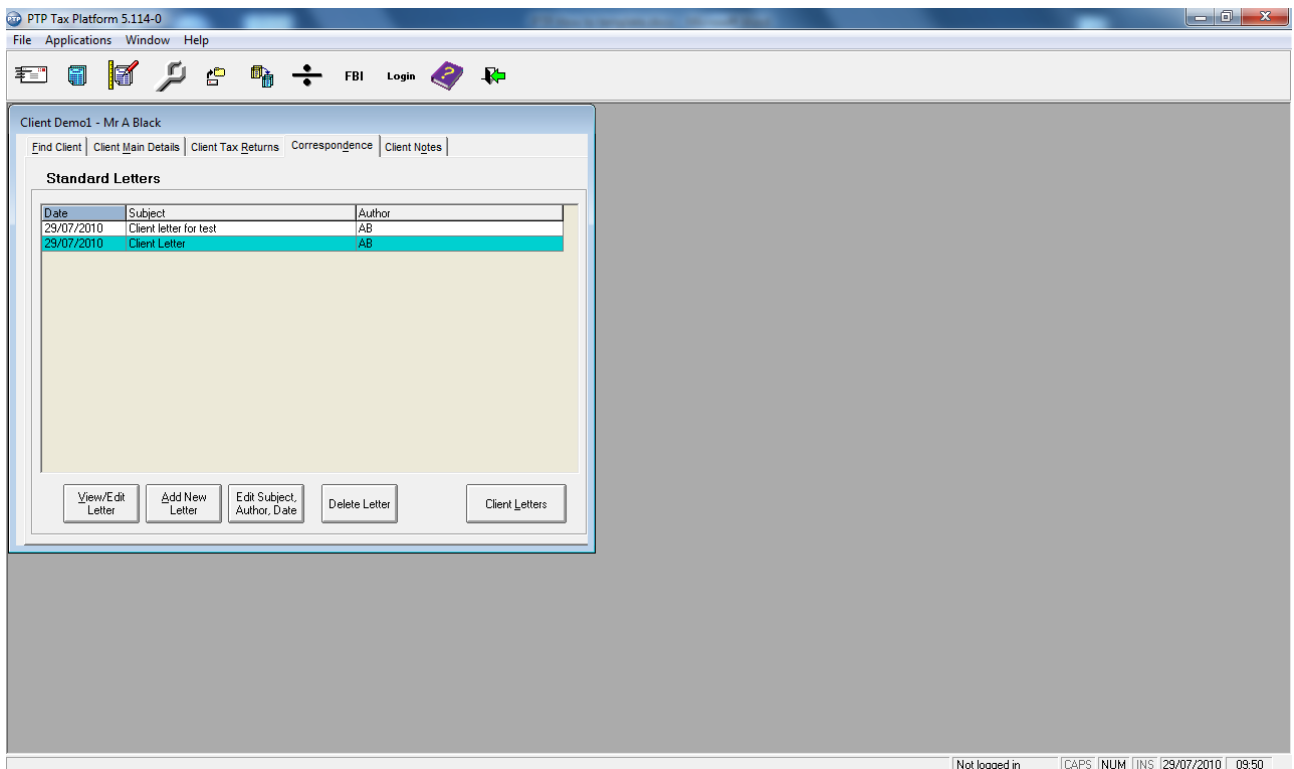


- On the top left hand corner there is a drop down menu where you can insert fields to be completed with relevant information from the client's main details or tax calculation

Creating Standard Letters and Mail Merge

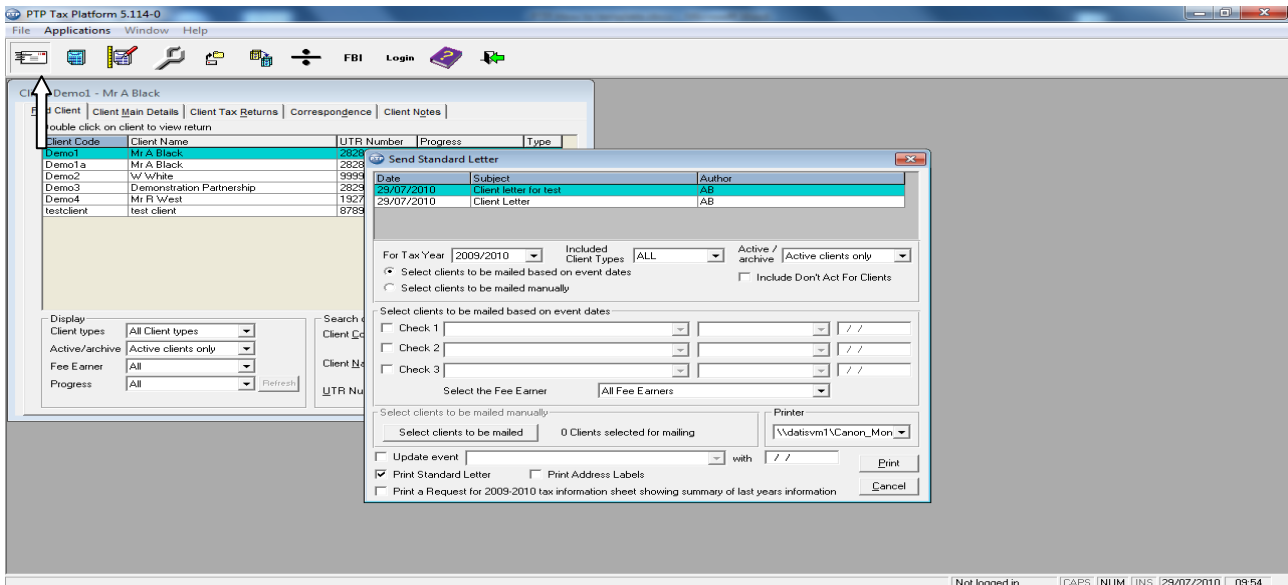


- Enter the letter as you wish, inserting fields that are relevant so you can access the clients tax figures from the calculation
- Once the letter is complete close the screen, either on the X or clicking File>exit and you will be prompted to save the changes of the letter
- This will then display on the standard letters screen as a saved letter



Step 2 – Mail Merge

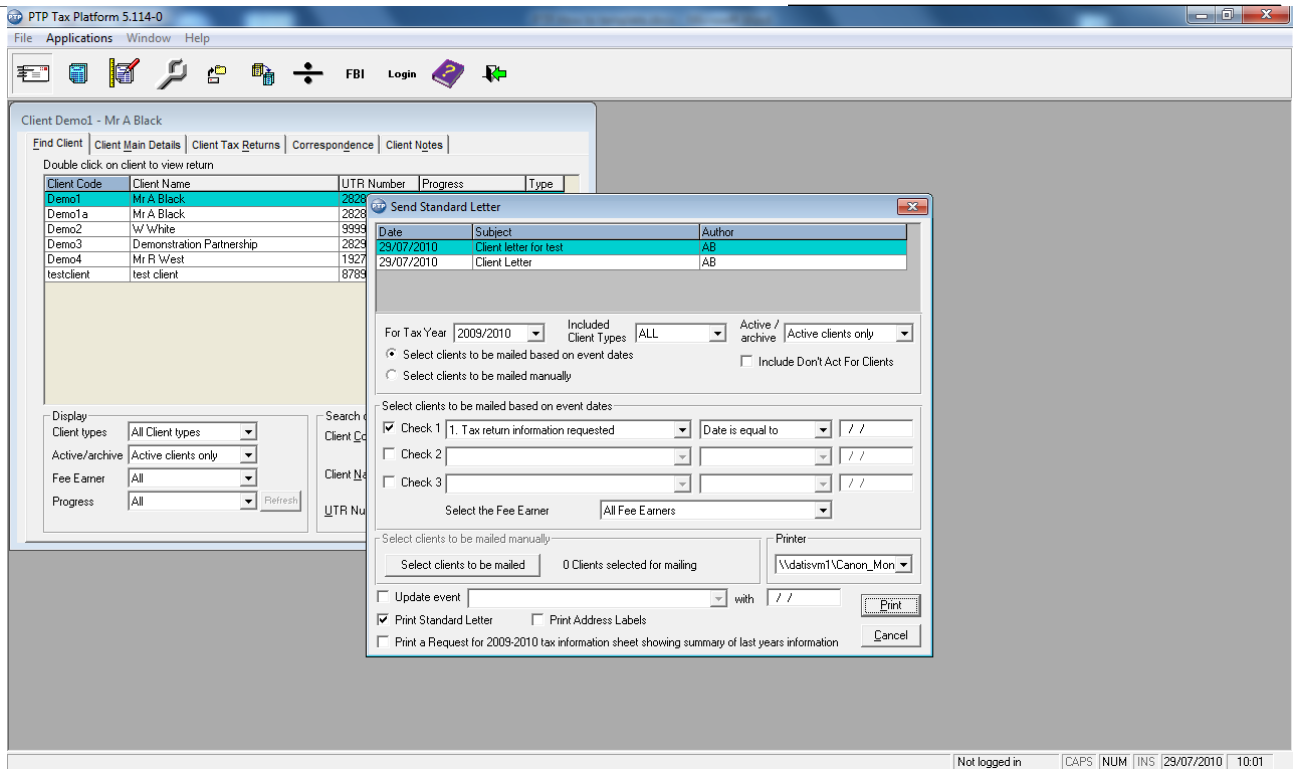
- once the standard letter has been completed if you click the first icon on the toolbar, mail merge, this displays the send standard letter window



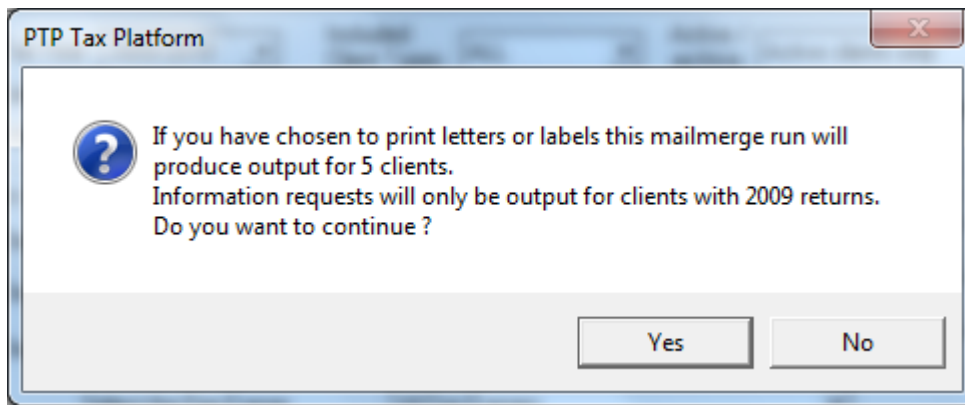
- this lists all standard letters already created
- there are two ways of mail merging, one is based on Event Dates, the second is based on selecting the clients manually

Based on Event Dates

- Highlight the relevant letter, leave the option of “select clients to be mailed based on event dates” selected, tick check 1 and from the drop down menu select which event you wish to use for the criteria, then select from the second drop down menu whether you wish the date to be before or after a specific date, and then enter the date (N.B. if you wish to send a letter to clients that haven’t got a date against a specific event, then you select the event, select “date is equal to” and then leave the date box blank as this will then report all clients that don’t have a date against a particular event)



- then you select print and it will display a screen showing how many clients are going to be mail merged

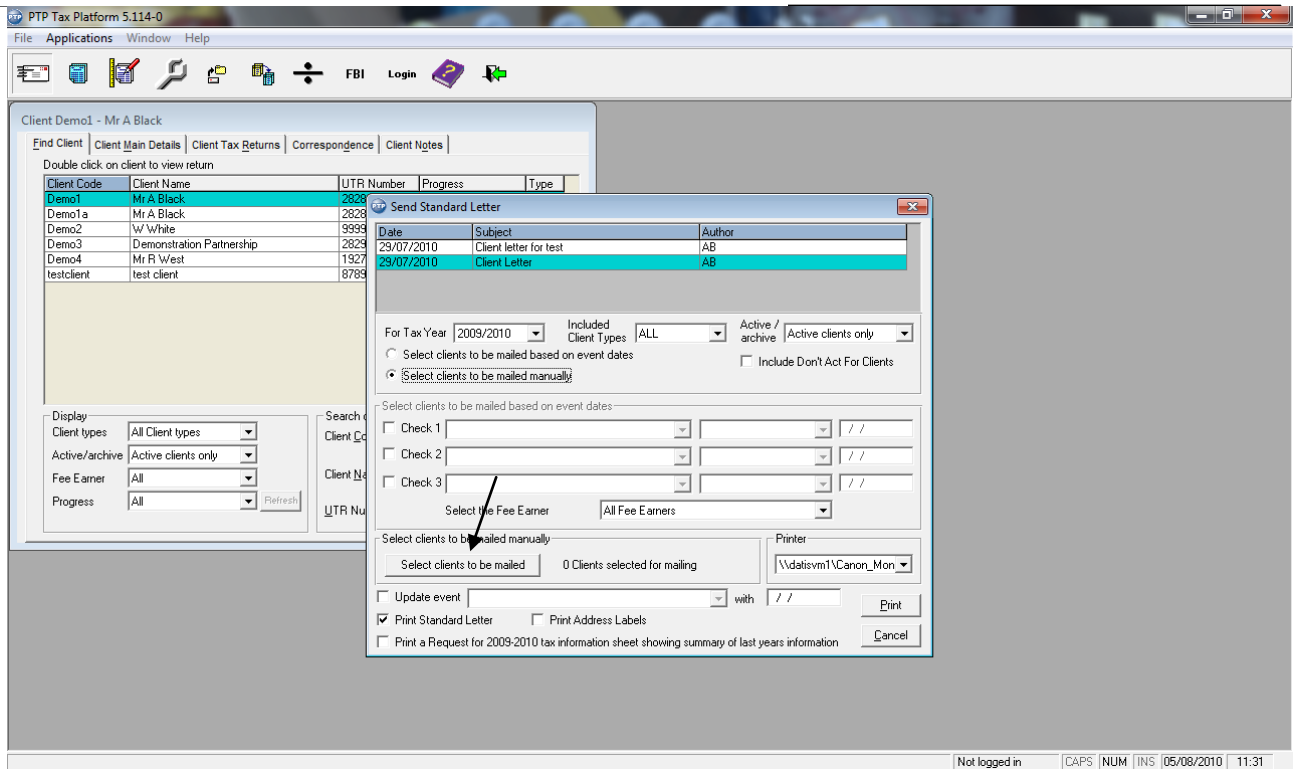


- click yes and the letters will be printed and any fields inserted in the standard letter screen will be populated with the information for each client

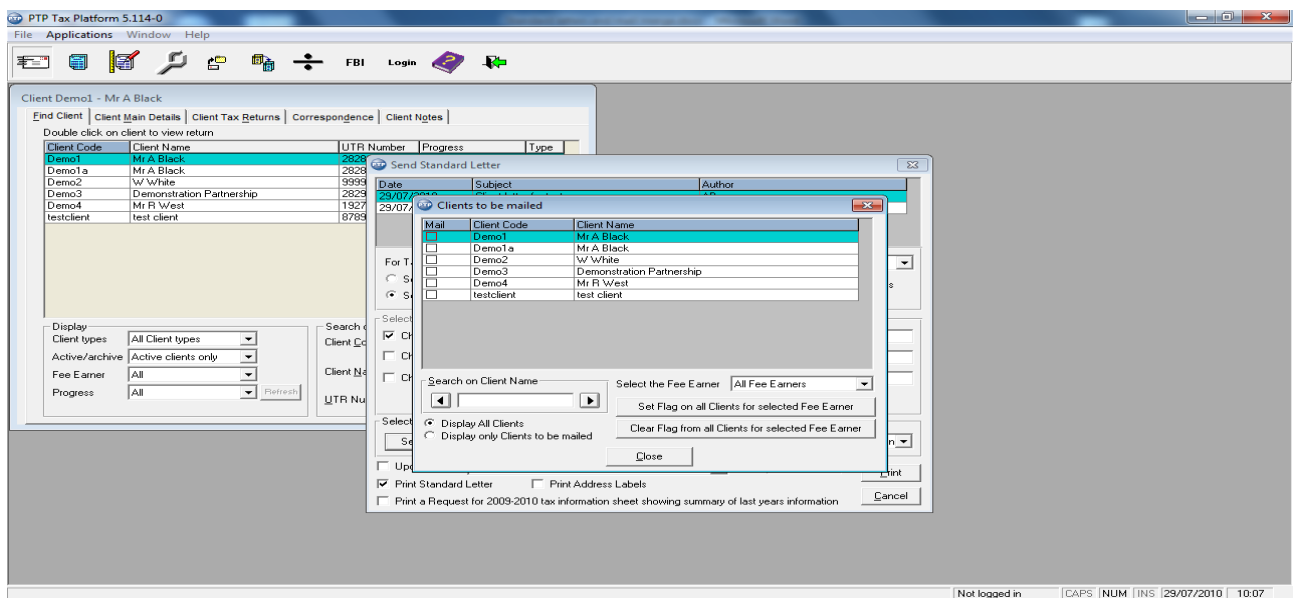
Based on Selecting Clients Manually

- Highlight the relevant letter and then choose the option of “select clients to be mailed manually”
- Click “select clients to be mailed”

Creating Standard Letters and Mail Merge



- this then displays a screen showing all clients with a tax return for the tax year you have installed



- you then have the option to “set flag on all clients for the selected fee earner” or you can select each client individually by ticking the mail box to the left of the client code
- Once all the clients have been selected when you close the window it will then display how many clients have been selected for mailing and you then click print. Again all the fields that have been included will be populated with the entries relevant to each client