# 17

WORD-RITE

Now that we have explored the Contacts and Campaigns sections of the program, it is time to work with WordRite, the integrated, full-function Rich Text word processor that is included with PastPerfect. When you generate letters through PastPerfect, you will want to automatically merge information contained in PastPerfect's data fields into your mailings.

Using WordRite, you will be able to access such fields as: Date, Name, Address, Pledge Amount, and Donation Amount and merge those fields directly into your letters. This will make creating and sending out mailings fast and easy. In this chapter we will discuss, in detail, how to create professional, stylish letters merging the data you select from PastPerfect data fields. WordRite will be available whenever you open letters through Temporary Custody, Accessions, Contacts, Campaigns, or Contact Setup.

To begin, we will click on the **Setup** command button on the main menu. Select **Contacts** from the Setup Flyup menu. You will see the screen shown in Figure 17-1. Click on the Mail-merge Letters Tab. If no letters have been written, the list on the left will be blank. To create a letter for the first time, click on the **Add** command button. Enter a title for the letter in the blank provided and press **OK**. The new title will appear on the list at the left. It will be highlighted in blue. Press the **Compose Letter** command button and the WordRite program will be displayed.

If there are already letters in existence, you may edit the letters by highlighting them with the mouse and clicking on the **Compose Letter** command button.

Figure 17-1
Contacts
Setup Screen
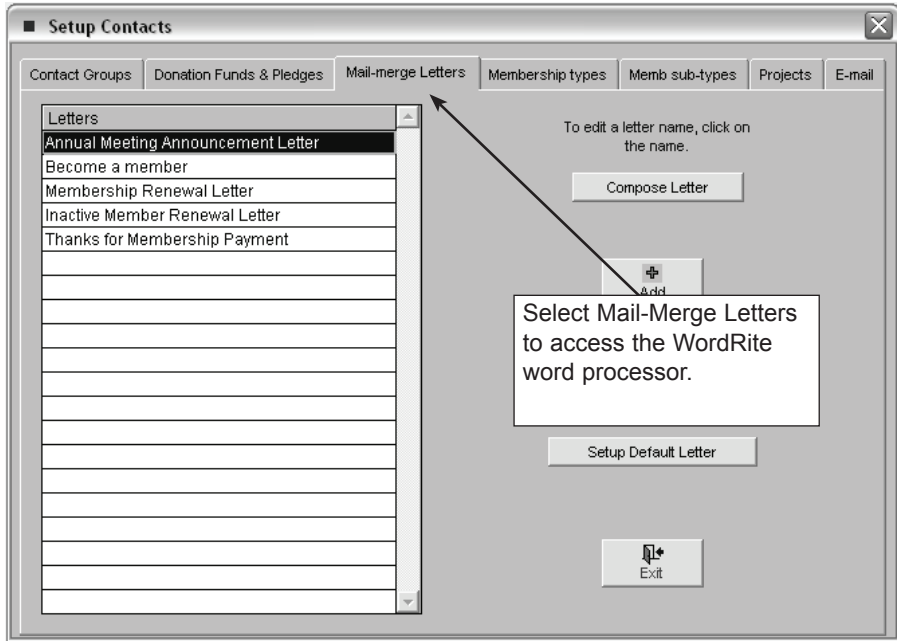
When the WordRite screen appears you will see three rows of tools at the top of the screen. We will discuss the function of each tool to give you the fundamentals you will need to compose and create your mail-merge letters.

Figure 17-2
WordRite
Screen
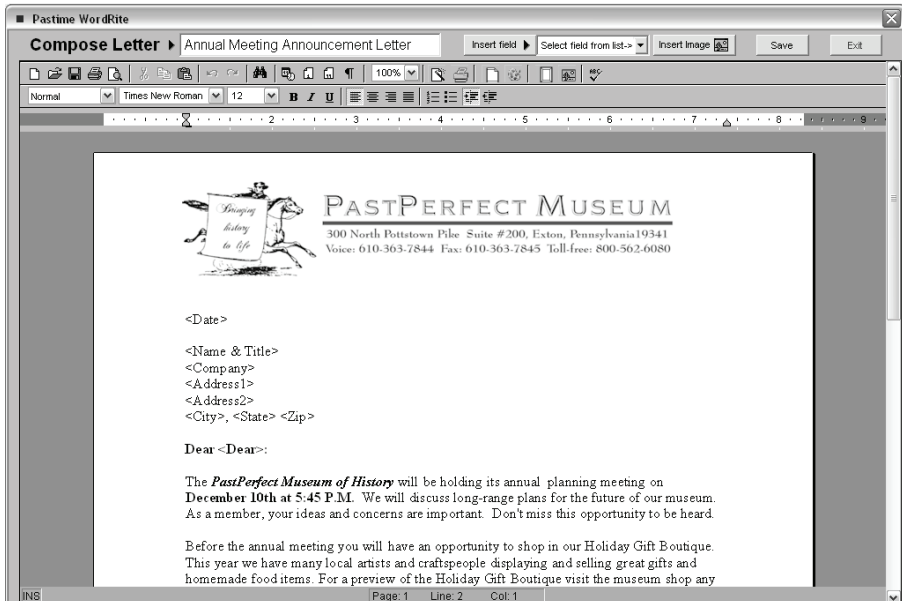
WORDRITE SCREEN

At the very top left of the WordRite screen the title of the current letter is displayed.

Insert field - The Insert Field combo box allows you to insert fields from PastPerfect databases into your letter. The mail-merge fields that are available for this letter can be displayed and selected from the combo box. Different types of letters will have access to different sets of fields.

Figure 17-3
Insert Field
Combo Box
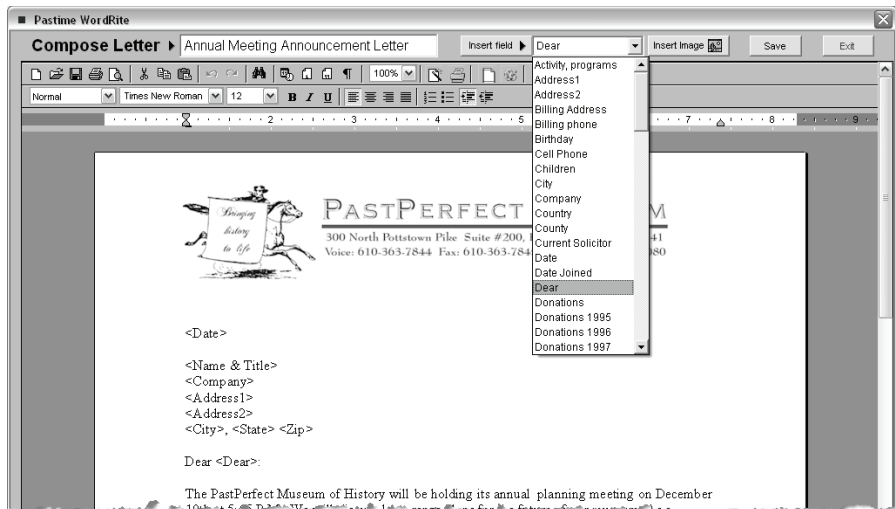
To insert the mail-merge fields:

1. Place the cursor on the document where you want the field to appear.
2. Click on the down arrow to the right of the Insert field box field window to peruse the list.
3. Highlight the field you want and click on it. It will appear in the field window.
4. Press the **Insert Field** command button to the left of the field name.
5. Repeat until all the fields you want are placed in your document.

The field name will appear in angle brackets on your document. When you use the mail-merge letter in conjunction with a mailing list, WordRite will fill in the mail-merge fields from the appropriate database. *See Lists & Labels, Chapter 16*.

Insert Image with Frame - This tool allows you to insert an image in your document within a frame. Text will flow around the image frame. You may move the image by clicking on the image then move the cursor outside the image until the cross icon appears. Hold down the left mouse button and move the image to the desired location and release the mouse. It is recommended that you insert images before you begin writing your letter or inserting mail-merge fields.

If you are going to insert a letterhead image, you may place it on a Header or Footer by first clicking on the Header and Footer tool, click on the Insert Image tool to add your image or letterhead.

Save - Press this command button to save your work before exiting the screen.

Exit - Press Exit to leave the WordRite screen.

WORDRITE TOOLS

We will now list the tools on the toolbars and discuss each tool as it appears going from left to right. Placing the cursor on the tool icon will reveal the title for each tool.

Erase all text - This tool removes everything on the page and leaves you with a completely blank page.

Import from RTF file - Allows you to import files from other programs such as MS-Word. It is not reccommended that you import letters with images.

Export to RTF file - This tool allows you to export your WordRite file to a Rich Text (.rtf) format which can be opened by other programs such as MS-Word.

Print - Use the Print command to access your computer's Printer Dialog Box. Select a printer and follow the instructions provided.

Print Preview - This tool displays the letter as it will appear on the page. From this display screen you may press the **Print** command or press **Edit** to return to the WordRite screen.

Cut - This tool allows you to cut highlighted portions of the text.

Copy - This tool allows you to copy highlighted portions of the text.

Paste - Use this tool in conjunction with the **Cut** or **Copy** tools. Place the cursor where you wish to place the cut or copied text and click on the **Paste** tool to insert the text where you want it.

Undo - Allows you to reverse the last operation. Click multiple times to reverse more past operations.

Redo - Allows you to redo the last operation. Click multiple times to re-create more past operations.

Find - Use this tool to search for words, phrases, or strings of text. First select whether you want the search to be case sensitive by clicking or unclicking the square box next to **Case Sensitive**. You have three choices with this tool:
1. **From Beginning of File** searches everything starting at the beginning of the file.
2. **Forward** searches all text starting at the place where the cursor is located.
3. **Backward** searches backward from the cursor.

Insert Date/Time - This tool allows you to automatically fill in today's date and time. Place the cursor where you want this to appear and select the Date/Time format from the displayed list to insert.

Insert Page Number - Use this tool to add page numbering to your document. Place the cursor where you want the page number to appear and click on this tool. Note: This is most effective when used in conjunction with the Header and Footer tool.

Insert Page Count - This allows you to insert page numbering that includes a page count. For example: "1 of 3". This tool is best used in conjunction with the Header and Footer tool.

Show Markers - Use this tool to display the hard carriage returns in your document. Click to display. Click again to hide.
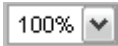
Zoom - Use the Zoom tool to display an enlarged or diminished version of your document by selecting the percentage at which you wish to view the document.

Margin Setup - Click on this tool and use the dialog box to set margins.

Printer Setup - Use the Printer Setup tool to select a printer and create settings such as paper size, source, orientation and other advanced printer settings.

Header and Footer - use this tool to set up the header and footer for the letter. For example, you may place a letterhead image on the header and the page number on the footer. These header and footer settings will now appear on all pages of the letter.

Select text color - Clicking on this tool will reveal a color palette. To change the text color, highlight the text and press the Select text color tool. Choose a color and press **OK**.

Insert Frame - The Insert Frame tool creates a box that may contain text or an image.

Insert Image - The Insert Image tool allows you to find and insert an image into your letter. The image inserted with this tool will not have a frame and will be placed depending on the location of the cursor. To move the image place the cursor next to the image and press the space bar or carriage return.

Note: To insert an image you must use either this tool or the Insert Image in Frame tool. Do not cut and paste images from other applications. This will result in embedded oversized images that will take up large amounts of storage space.

Spell Check - Click on the Spell Check tool to open the Spell Check dialog box. Spell Check will alert you to any words that are not in the WordRite dictionary.

Font - You may use any font in WordRite that is available for your computer. To change the font, select the text with the mouse. Click on the down arrow to the right of the Font field. Highlight and click on your selection to change the font.

12 ⌄ **Font Size** - To change the font size, select the text with the mouse. Click on the down arrow to the right of the Font Size field. Highlight and click on your selection.

B **Bold** - To change text to Bold, select the text with the mouse. Click on the **B** tool to change the text to Bold.

I **Italic** - To change text to Italic, select the text with the mouse. Click on the *I* tool to change the text to Italic.

U **Underline** - To underline text, select the text with the mouse. Click on the **U** tool to underline the selected text.

≡ **Align Left** - This tool aligns the text on the left. Select the text that you wish to align by highlighting with the mouse. Then, click on the Align Left tool.

≡ **Center** - This tool centers the lines of text. Select the text that you wish to align by highlighting with the mouse. Then, click on the Center tool.

≡ **Align Right** - This tool aligns the text on the right. Select the text that you wish to align by highlighting with the mouse. Then, click on the Align Right tool.

≡ **Justify** - This tool aligns the text on both the left and the right. Select the text that you wish to justify by highlighting with the mouse. Then, click on the Justify tool.

≟≡ **Numbering** - This tool creates a numbered list. Highlight the text using the mouse. Click on the Numbering tool to create a numbered list.

≔ **Bullets** - This tool creates a bulleted list. Highlight the text using the mouse. Click on the Bullet tool to create a bulleted list.

≟≡ **Increase Indent** - Use this tool to increase the size of the paragraph indentation.
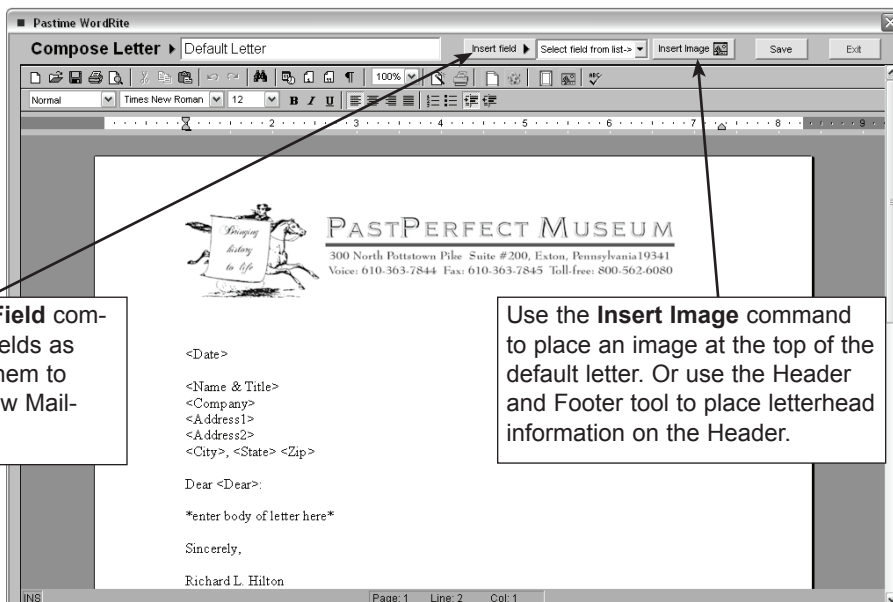
≟≡ **Decrease Indent** - Use this tool to decrease the size of the paragraph indentation.

SETUP DEFAULT MAIL-MERGE LETTER

Now that all the tools have been explained, let's create the default mail-merge letter in Contacts Setup. It is a good idea to create a default letter with the basic mail-merge fields already selected. This information will be pre-filled whenever you create a new letter and will let you start all your letters with the basics already filled-in. This will save time and make creating new letters easy.

Click on the Mail-merge Letters tab and select the **Setup Default Letter** command button. The WordRite screen will appear. Place your Letterhead image at the top of the screen or use the Header and Footer tool to create a header where you can type letterhead information. You may also place your letterhead image on the header. However, if your letter is more than one page, everything placed in the header and footer will appear on every page of your letter.

Figure 17-4
Setup Mail-
merge Default
Letter

Use the **Insert Field** command to place fields as you would like them to appear on all new Mail-merge letters.

Use the **Insert Image** command to place an image at the top of the default letter. Or use the Header and Footer tool to place letterhead information on the Header.
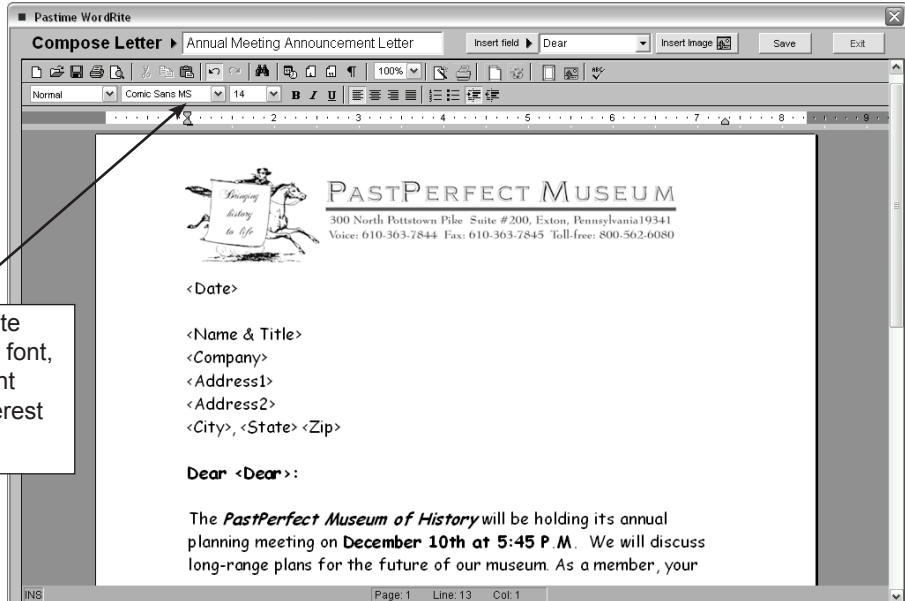
CREATE A MAIL-MERGE LETTER

Now that you have created a Default letter, you may create any number of specific mail-merge letters for your organization. Here are the steps:
1. Press the **Add** button to start a new letter. You will be given a window in which to type the title of the letter.
2. Type a title for the letter.

3. Once you have named the new letter, press **OK**. The new letter will be placed on the list at the left and highlighted in blue.

4. Press the **Compose Letter** command to activate WordRite.

Figure 17-5
create a new
Mail-merge
letter

Use the WordRite tools to select a font, font size and font color to add interest to your letters.

Notice that your new letter contains all the fields and the letterhead image that you entered on the default Mail-merge Letter. Now type the body of your letter. You may use any font or font size that is available to your computer to create your letter.

PRINT A MAIL-MERGE LETTER

Now that you have created a mail-merge letter, you have several options for printing the letter.

PRINT ONE LETTER FROM THE CONTACT SCREEN

To send a letter to only one individual go to the Contacts screen. Select the contact you wish to send a letter to by using the **Next** and **Prior** commands at the top of the screen. You may also select the contact by pressing the **Browse** command at the top of the screen. PastPerfect will display your contacts in table form. Highlight the contact you want and press Enter. Or you can use the **Find** command to locate the desired contact.

Next, press the **Print** button at the top of the screen. The screen below will be acti-vated. Highlight the letter on the **Letters on File** list that you wish to send to this contact. Press the **Print Letter** command button. The WordRite screen is activated. Notice that the information from the contact is now filled in automatically. You may edit the letter at this point. However, keep in mind that changes made here will only change this particular letter for this particular contact. The mail-merge letter on file and the default letter remain unchanged.

Figure 17-6
Print Screen
from Contacts
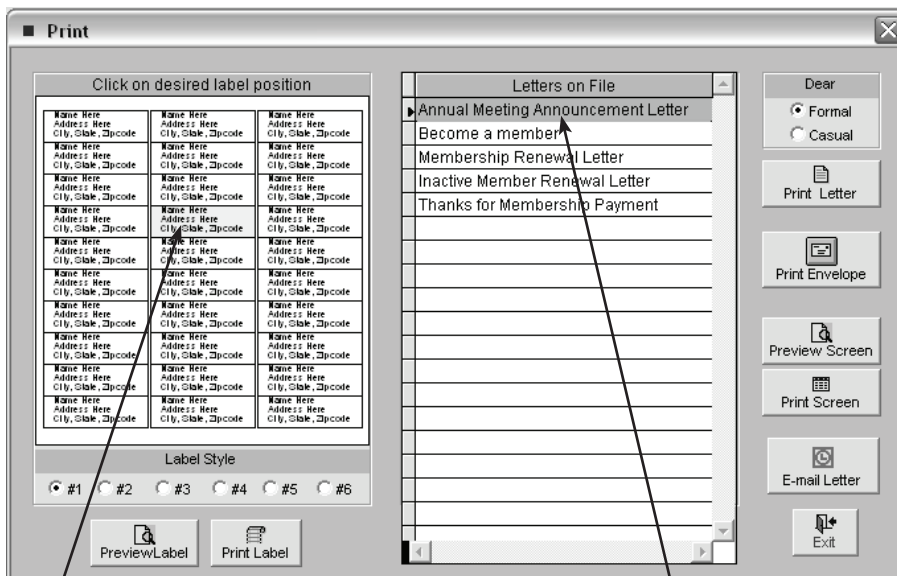
Select the mailing label you wish to print from the Label Grid. Highlight the label position, select the label style and press **Preview** or **Print Label**.

Select the letter that you want to send to this contact from the Letters on File list on the right of the screen. Highlight your selection and press **Print Letter**.

When the letter is ready to print, press the **Print this Letter** command button at the top of the WordRite screen. Your printer will be activated. Follow your print-er's instructions to complete the printing process.

PastPerfect has a special built-in printing feature that allows you to print individ-ual mailing labels when you print a letter from the Contacts Screen. This feature allows you to re-use mailing label stock. Simply select the position on the mailing label stock by highlighting the position with the mouse. The printer will print the contact mailing information on that particular label.

PRINT MULTIPLE LETTERS USING A MAILING LIST

To print a mass mailing, select Lists & Labels from the PastPerfect main menu. The following screen will be revealed. This screen shows all the mailing lists, both user-defined and fixed, that are available. Select the desired list and press the big **Continue** command button.

Figure 17-7
Lists & Labels
screen

Select the List for which you wish to print a mailing, and press the **Continue** command button.
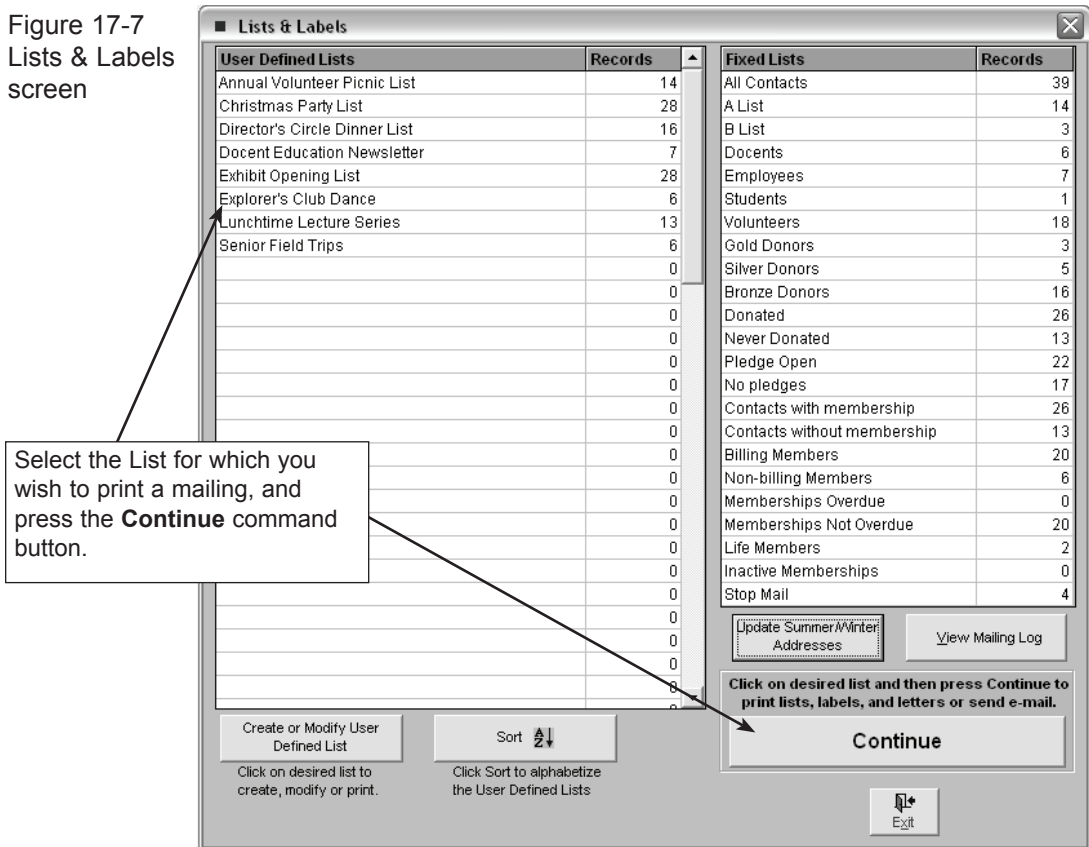
Pressing the **Continue** command button will activate the screen shown in Figure 17-8 where you may narrow the list to be printed by using the field range choices on the left side of the screen.

For example, you may wish to print letters for contacts whose last names begin with the letters A through L. To print only that sub-set of the list type "*From* AA *Thru* LZ" in the Last Name fields. This will narrow the list to only contacts whose last names fall between "A" and "L" in the alphabet. Once you have narrowed

Figure 17-8
Select List
Screen

Use the range fields to narrow the list of contacts for which you wish to print a mailing. If you want to send the mailing to all contacts on the list simply leave the pre-filled setting.

Press the **Print Letters** command button when you are satisfied with the list you have selected.

your list to only the contacts for which you wish to print letters, Press the **Print Letters** command button.

Pressing the **Print Letters** command button will activate the WordRite screen as shown in Figure 17-9. At the top of the screen you will notice a row of new command buttons that have not been available before.

Print Letter - This window shows you the titles of the letters that are available for printing. To peruse the list, press the down arrow to the right of the blank window. To select a letter, highlight it with the mouse and click. The selected title will appear in the title window.

Print this Letter - This command lets you print the default letter template.

Print all letters - This command sends a letter for each contact on the list to your printer.

Print selected letters - This command allows you to go through the letters one at a time and decide to print or not print each letter.

Dear Formal/Casual - Select whether you want to print the letter using the casual or formal Dear name for the selected letter. Click on the radio button to choose casual or formal.

Figure 17-9
WordRite
Screen

Use the down arrow to the right of the Letter Title window to view the list of available letters.