

Sending Initial Ask Letter through MP

The content of Letters in Ministry Platform can be edited. The format cannot. If you wish to have more flexibility in formatting your CSA letters, consider doing a merge. Instructions can be found on the training website.

Completing necessary clean-up steps: Receiving a letter containing the name of a divorced or deceased family member can be very painful for the surviving family members. Before you send any CSA follow-up letter, you should review these views and rectify these potentially painful situations.

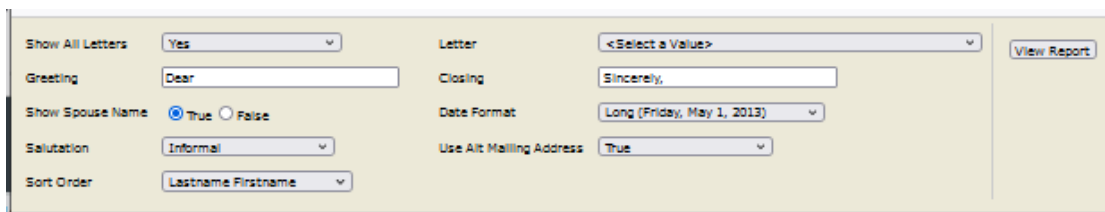
1. Visit this view: [Fix: Households w/ Deceased Contact](#) If you have any families that contain deceased Heads of Household, you must run the DPT.
2. Visit this view: [Fix: Divorced Heads in same Household](#) If you have families that contain both divorced (or separated) Heads of Household, you must either:
 - Move one of the spouses to his/her own household marked as Head of Household. **Or,**
 - Mark one of the spouses as Other Adult and change his or her Contact Status to Inactive. The remaining spouse should remain Head of Household.

Using a letter from the CSA handbook

1. Click **Advanced Navigation > Communication > Diocese Template Letters**
2. Double click the letter you would like to edit for your purposes.
3. Click the **Actions** button, choose **Copy** and then **Edit**
4. Change the **Letter Title** to give it a name appropriate for your needs.
5. Edit the following fields as you see fit.
 - a. **Letter Opening:** Leave the letter text in there.
 - b. **Letter Body:** Leave this blank.
 - c. **Letter From** (Do **not** enter "Sincerely" in **From** but DO add 2 blank lines.)
6. Select your parish from the **Congregation** drop down list.
7. Click **Save** and then click **Close** on the warning pop up.

Printing the letter

1. **Important:** Clear any sticky/saved selections:
 - a. Click **Home** on the left menu and click **My Selections** on top of screen.
 - b. Check the **check box** at the bottom of the screen to select everything.
 - c. Click the **Actions** button and choose **Clear** and then **click the Clear** button.
2. Click **Contacts** and choose the view **All Current Contacts**.
3. Check the box in the lower left corner to select everyone on this view.
4. Click the **Reports** button and choose **Selected Contact Letter - Erie**.
5. Select your new CSA letter from the **Letter** drop down menu in the shaded area.
6. Edit the **Greeting** and **Closing** if needed.
7. Choose your **Salutation** style
8. Choose your **Sort order**.



9. Click **View Report**
10. Click the **Diskette** button and choose **PDF** to save and print your letter.
11. Special note for Thank you letters: Mark the records to indicate the thank you was sent:
 - a. While the records are still check marked, click the **Actions** menu and choose **Assign**.

- b. Check the box marked **Acknowledgement Date**.
- c. Choose today's date and click the Assign button.

12. **Important:** Clear your selections

- a. Click the arrow next to **All Records** in the lower right corner and choose **Current/Unsaved Section**.
- b. Click the **x** to deselect your contacts.

