



Sending Follow Up Letters 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 correspondence 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. Click **Contacts** and choose this view: **Fix: Households w/ Deceased Contact** If you have any families that contain deceased Heads of Household, you must run the DPT.
2. Click **Contacts** and choose 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 the only Head of Household

Creating the letter: Follow these steps to use a letter from the CSA handbook

- A. Click **Communication** and choose **Diocese Template Letters**.
- B. Double click the letter named: **CSA 4 Follow Up Ask Letter**.
- C. Click the **Actions** button, choose **Copy** and then **Copy Record**.
- D. Click the **Edit Record** button and change the **Letter Title** if you desire.
- E. Edit the following fields as you see fit.
 - i. **Letter Opening:** Leave the letter text in there but feel free to edit the contents.
 - ii. **Letter Body:** Leave this blank.
 - iii. **Letter From** (Do **not** enter "Sincerely" in **From** but DO add 2 blank lines and your pastor's name.)
- F. Select your parish from the **Parish** drop down list.
- G. 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.
- 2) Click the **Actions** button and choose **Clear** and then click the **Clear** button. Choose the follow-up approach that best fits your needs from the bulleted list below
 - **Those who have not yet given to this year's CSA**
 - a. Click **Contacts** and choose the **CSA – Never Given view**
 - **Those who gave last year but not this year (LYBUNT)**
 - a. Click **Contributions** and choose **CSA BUNT Families**.
 - b. Choose the **LYBUNT** view
 - c. Check the box in the lower left to select all records. (This is one time where we WANT sticky selections.)
 - d. Click **Contacts** on the left menu.
 - e. Choose the view named **CSA BUNT Selected Families**.
 - f. Check the box in the lower left to select all records.

- **Those who gave to some past CSA but not this year (SYBUNT)**
 - a. Click **Contributions** and choose **CSA BUNT Families**.
 - b. Open the **SYBUNT** view
 - c. Check the box in the lower left to select all records. (This is one time where we WANT sticky selections.)
 - d. Click **Contacts** on the left menu.
 - e. Choose the view named **CSA BUNT Selected Families**.
 - f. Check the box in the lower left to select all records.
3. Click the check box at the bottom left to select everyone on the list or check mark specific people as needed.
 4. Click the **Reports** button and choose **Selected Mail Merge 1 Per Family - Erie**.
 5. Select the follow up letter you created 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
 - d. Click the arrow next to **All Records** in the lower right corner and choose **Current/Unsaved Section**.
 - e. Click the **x** to deselect your contacts.

