



Sending CSA Thank You 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 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.

Will you need labels for these letters? Labels should be printed first. You can find instructions on the training website: <https://www.eriescd.org/mpt2.html>. Click the **Contribution** quick link and print the instructions for **Labels for Thank you letters** found under the **Option 1** sub-heading.

First you have to create the letter. Follow these steps to use a letter from the CSA handbook

- A. Click **Communication > Diocese Template Letters**
- B. Double click the letter you would like to edit for your purposes.
- 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 Ministry Platform's menu and click **My Selections** on top of screen.
 - b. If anything appears on this page, click the **check box** at the bottom of the screen.
 - c. Click the **Actions** button and choose **Clear** and then click the **Clear** button.
2. Click **Contributions** and choose **Pledges**.
3. Choose the view named **CSA Thank You**.
4. Check the box in the lower left corner to select everyone on this view.
5. Click the **Reports** button in the upper right and select **Selected Contact Letter - Erie**
6. Select the letter you created in steps A-G above from the **Letter** drop down menu in the shaded area.
7. Edit the **Greeting** and **Closing** if needed.
8. Choose your **Salutation** style
9. Choose your **Sort order**.

The screenshot shows a configuration form for generating letters. It includes the following fields and options:

- Show All Letters:** Yes (dropdown)
- Greeting:** Dear (text input)
- Show Spouse Name:** True (radio button selected), False (radio button)
- Salutation:** Informal (dropdown)
- Sort Order:** Lastname Firstname (dropdown)
- Letter:** <Select a Value> (dropdown)
- Closing:** Sincerely, (text input)
- Date Format:** Long (Friday, May 1, 2013) (dropdown)
- Use Alt Mailing Address:** True (dropdown)
- View Report** button

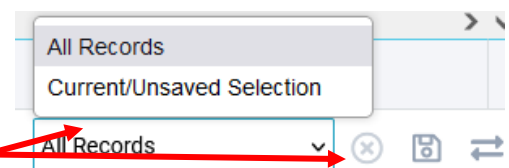
10. Click **View Report**
11. Click the Diskette button and choose PDF to save and print your letter. Mark the records to indicate the thank you was sent:

STOP! If you are printing labels too, wait to do this step until both the letters and the labels are printed.

- 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.