Training Tips For

What about letters?

If you want to add a __NEW__ letter:

- Click designated subject from the **Top** task bar: **STUDENTS, FAMILIES, CATECHISTS**, etc.
- Click **INDIVIDUAL LETTER**, **LABEL** on the **Left** task bar.
- Click your choice: **STUDENT, FAMILY, CATECHIST,** or **PARENT & GUARDIAN LETTER**
- The report will display **OVERVIEW**
  - ⇒ **First EDIT:** Changes the name of the letter so it can be recalled for future use.
  - ⇒ **Second EDIT:** Will WHITE the main context box for the **DESCRIPTION** of the letter for reference.
- (1st) Click Next   (2nd) Click on Next (Will Keep All Default)
- LETTER LAYOUT: Area to keep or change select areas of the letter.
  - ⇒ **INSIDE ADDRESS STYLE**
  - ⇒ **BODY OF THE LETTER**: Type the content of the letter here
- Click OK: Letter will be displayed on screen
- Click <Back on bottom Right corner if changes are needed to letter.

If you __already have__ *a letter* in another program (Microsoft Word or Publisher, etc.),

- **COPY** the letter from the Microsoft program then return to PDS
- Follow the direction from above to **BODY OF THE LETTER** then **PASTE** the letter
- Finish the process as above.

Do not copy any names / addresses / dates with the letter. PDS inserts them into the letter. Click **NEXT** and from this screen you can select who will get the letter and any other criteria that is needed on the **Right** hand side of the screen. Click **PREVIEW** and you view your letter and print.

What if you wanted to send this letter to two or more families?

- Click designated subject from the **Top** task bar: **STUDENTS, FAMILIES, CATECHISTS**, etc.
- Click **REPORTS** in the **Left** task bar at the bottom.
- Click **FAMILY REPORTS**
- Click **LETTERS** (misc letters are already created) ... ADD in the bottom left corner
- **LETTER** (As above WHITE square will appear. Write the BODY of the letter only. — **OK**
- **TITLE & DESCRIPTION** for future use **NEXT** .... Change address, signature, margin if needed
- **SELECTION INFO** (verify all info Sortations & Restrictions)
- Click **FAMILY SELECTION** (Include ALL families; ANY of the following families; desired families)
- **PREVIEW** — **PRINT**

What if you wanted to send this letter to parents of students in the third grade?

- Follow instructions from directly above. Instead of choosing **FAMILY SELECTION**,
- Click **ADDITIONAL SELECTIONS**   **< click here to add new conditions>**
- Choose **DETAIL** required for desired sorting
- Use the arrow on the **Right** to find **CLASS** in the choices.
- Click **CLASS**   Exp. **1 Class.Grade is equal to (click)**
- Grade choices will appear when you click on the open space above. Choose the Grade desired.
- **PREVIEW** and **PRINT** and **CLOSE**.
- **NAME** & **DESCRIBE LETTER** so you can return to it for future use.

Letters will automatically be kept track of under each **STUDENT, FAMILY, CATECHIST** or **PARENT/GUARDIAN** if you desire.

PDS Formation