

How do I Create a Default Pledge Payment Reminder Letter?

Version 4.0

The Default Pledge Payment Reminder Letter allows you to set the layout for all future pledge payment reminder letters. It may be helpful to insert your logo or letterhead, signature, address information and the fields that would be commonly included on each of your pledge payment reminder letters. Think of the default letter as a way to set a template for future pledge payment reminder letters in your PastPerfect program. We suggest you create the default letter before starting work on your campaigns and pledge letters.

1. From the Main Menu, go to Setup | Contacts | Donation Funds & Pledges.
2. Click "Default Pledge Payment Reminder Letter."
3. Using PastPerfect's Word-Rite word processor, you can customize the text of your letter. If you want to add mail merge fields to your letter, put your cursor where you want the field to go, and then use the drop-down menu at the top of the screen. Click on the field name to select it and then click "Insert Field."
4. Once you've made all your changes, click "Save."
5. Click "Exit."

****Important:** Mail merge fields should not be modified once they are inserted into letters. The mail merge fields will only pull in the proper information if they are left in their default format. This includes the brackets on either side of the field name.

Once you have set up the Default Pledge Payment Reminder Letter, you can customize the pledge payment reminder letter for each campaign. For example, you may want to write the pledge payment reminder letter for the "Annual Fundraising" campaign differently than the reminder letter for the "Building Renovation" campaign. To create individual reminder letters for each campaign, go to the Campaign Management screen for the specific campaign, and click "Setup Pledge Payment Reminder Letter." The starting point for this letter will be the Default Pledge Payment Reminder Letter at the time the campaign record was added.

If you have any questions, please contact our Support Office at 1-800-562-6080 or email support@museumsoftware.com. Thank you for using PastPerfect!