



## Alarm Manager Help Sheet

### Letters

#### 1. Introduction

The Letters feature of Alarm Manager will allow you to do as follows:

- Setup standard Letters or Documents. Examples include:
  - A Letter to advise Customers when their Next Routine Maintenance Call is due
  - System Design Proposal
  - Acceptance Certificate
- Using a "Mail Merge" feature you can incorporate fields from the Customer and System databases into any Letter or Document allowing you to personalised Letters or Documents.
- You can print any Letter or Document for one Customer.
- You can print any Letter or Document for all Customers whose Next Routine Maintenance Call is due within a certain range of dates.
- You can print any Letter or Document for all Customers with a particular Premises Type.

#### 2. Data Maintenance – Letter Templates

Before you use the Letters features of the system, you must setup your required Letter Templates. This is done in Data Maintenance – Letter Templates. The system includes a number of sample Letters/Documents which you may use or amend as required. You can setup as many Letter templates as you need.

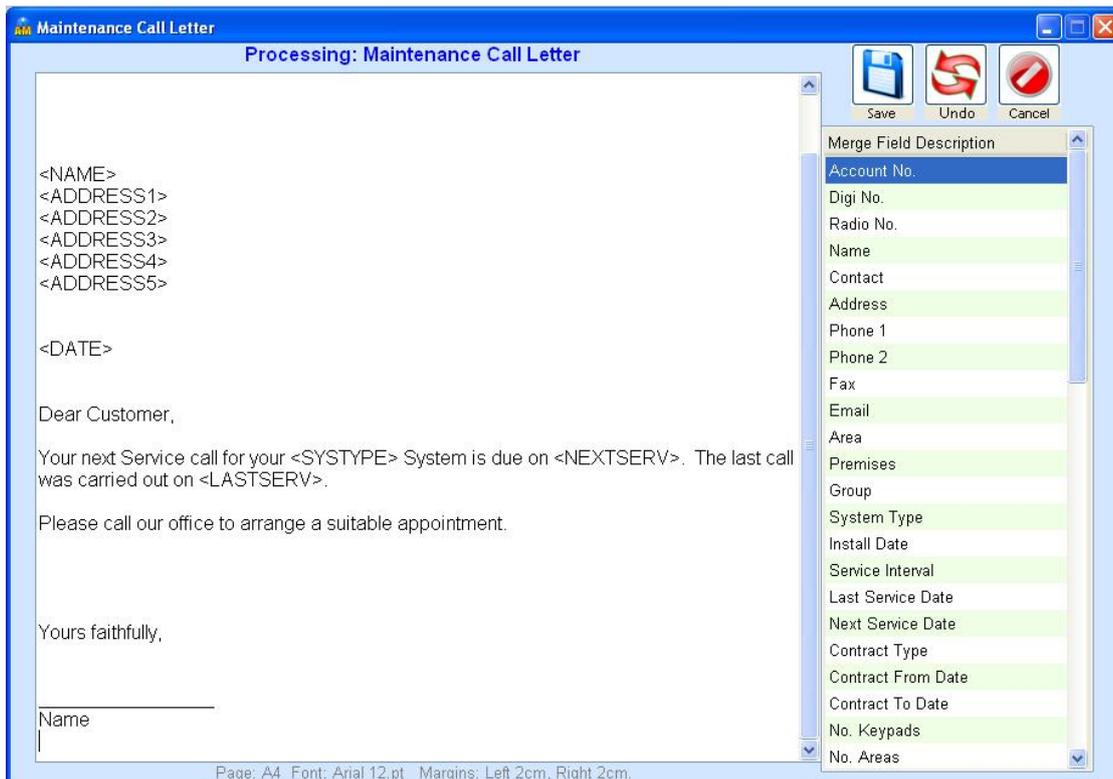


## Editing a Letter Template

To Edit or View an existing Letter Template, select it and click on the “Edit” button.



The Letter Template will be displayed as follows:



The screen consists of a basic text editor in which you can enter the text required for the Letter.

Merge Fields are used to include fields from the Customer or System databases.

There is a full list of Merge Fields displayed on the right side of the screen. In the body of the Letter, Merge Fields are identified with Field Markers which consist of the Field Name enclosed in square brackets e.g. <NAME>. When you print the Letter at a later stage the Merge Fields will be translated to the actual field from the Customers record. For example <NAME> will be translated to the actual Customers Name and <DATE> will be translated to the current date.

To insert a Merge Field into the Letter, simply position the cursor at the location where you would like to insert the Merge Field and then select the Merge Field from the list, the field marker will then be inserted. Ensure that you leave one space after the Merge field before continuing the sentence.

If you plan to print the Letter on your Company Letterhead, you should leave the required number of blank lines at the top of the Letter Template before commencing text.

When you are finished editing your Letter Template, click on the “Save” button.

### **Adding a new Letter Template**

To Add a new Letter Template click on the “Add” button.



Each new Letter Template will be automatically assigned a number. You need to enter a Description. Once you have entered the Description, click on “Save” and then click on the “Letter” button.



The Letter Text Editor will then open with a blank Letter and you may create your Letter Template as described above in the Edit section.

### **Deleting a Letter Template**

To delete a Letter Template click on the “Delete” button.



You must be logged on as Admin user to delete a Letter Template.

### 3. Printing a Letter for one Customer

To print a Letter for one particular Customer, in the Customer screen, select the required Customer and select the Systems option.



A Letter can only be printed for a particular System so you must first select the System for which the Letter should be printed. This is because some of the Merge Fields used in the Letter facility are related to the System database.

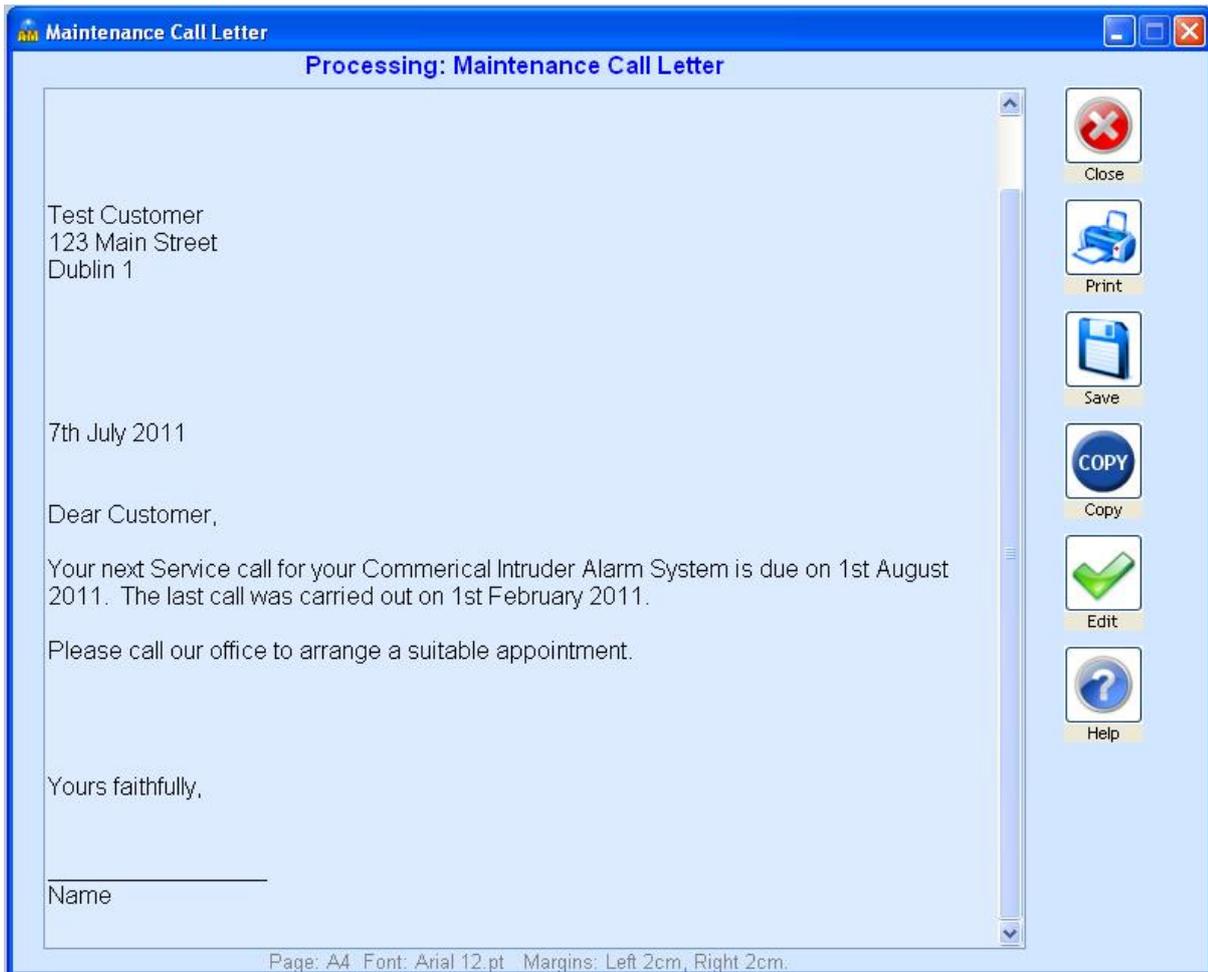
Once you have selected the required System, or if there is only one System, click on the Letters button.



You can then select the required Letter. To select a Letter - double-click on the Letter or select the Letter and click on the "Select" button.



Once you have selected a Letter, the Letter will be generated for the selected Customer/System and displayed on the screen.



You will notice that any “Merge Fields” contained in the Letter will be translated to the actual field from the Customers record. For example <NAME> will be translated to the actual Customers Name and <DATE> will be translated to the current date.

When the Letter is displayed, you can choose one of the following options:

### **Edit**

This will allow you to edit the content of the Merged Letter. When you are finished editing the Letter, click on Save but please note that the Edited Letter will not be permanently saved in any way and the original Letter Template will not be Saved. Clicking on Save simply returns to the previous screen where you can choose one of the following options.

### **Print**

Prints the Letter to your default printer.

### **Save**

Allows you to Save the report to a file which you can then open in another application, e.g. Word or Excel.

### **Copy**

Copies the entire report to the Windows Clipboard. You can then Paste it into any other application e.g. Word, Excel, Email application, etc. Tip: It is easier to transfer the report to Word by Copying and Pasting it rather than Saving it to a file.

#### 4. Maintenance Calls Due Letters

On the menu, select **Reports - Maintenance Calls - Maintenance Calls Due Letters**.

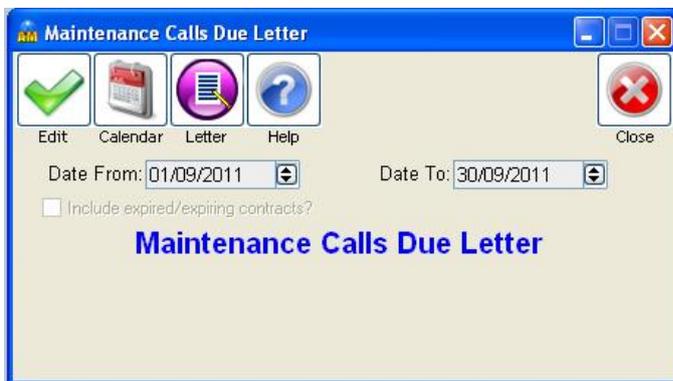
This option will allow you to generate a standard Letter for each Customer whose Next Maintenance Call is due within a specified range of dates.

The dates will default from the beginning to the end of the current month. You may change these dates to any dates of your choice although you cannot use any dates prior to the beginning of the current month.

Note the check box option as follows:

##### ***Include expired/expiring contracts?***

By default, customers whose contracts have expired or are due to expire before the date of the next Maintenance Call will be excluded from the report. Selecting this option will include such Customers on the report but details of their expiry dates will be printed.



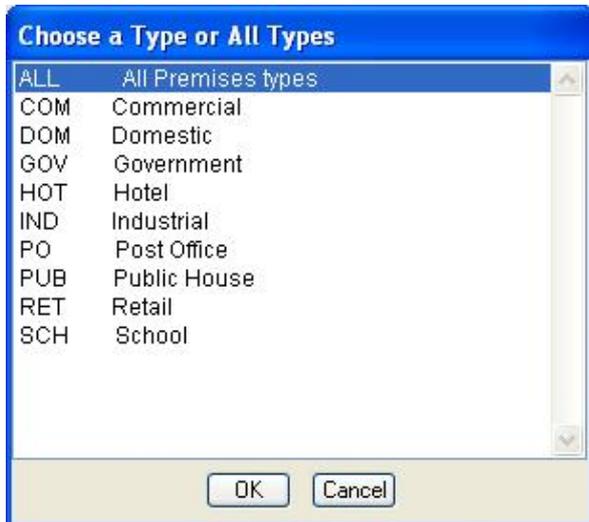
Once you have selected the range of dates, click on the Letter button and select the required Letter. The selected Letter will then be generated for each Customer with a Next Maintenance Call due within the specified range of dates and all letters will be displayed. You may then choose to Edit, Print, Save or Copy the Letters.

## 5. Customers by Premises Letters

On the menu, select **Reports – Customer Lists – Customers by Premises Letter**.

This option will allow you to generate a standard Letter for all Customer with a particular Premises Type, for example all “Commercial” customers.

You will be required to select a Premises Type or you can select “All Premises Types”.



Once you have selected a Premises Type, click on the Letter button and select the required Letter. The selected Letter will then be generated for each Customer with the selected Premises Type and all letters will be displayed. You may then choose to Edit, Print, Save or Copy the Letters.

## 6. Customers by Premises Letters

Further options to allow you to print Letters for certain criteria will be added to the software soon. We welcome your suggestions regarding the criteria which should be catered for.