

Intelligent Letter Writer



Being able to use the information within InterAcct's Client/Prospect database to quickly create a personalised letter to one (or more) of those names is often more efficient than using a separate Word Processor.

InterAcct's Letter Writer can be used to –

- selectively send one of your standard form letters to a Contact Name
- send to a selected group of businesses, and contact names within those companies
- Create (covering) letters in relation to a job to any job related Party including Variation to Contract letters
- Minimal keystrokes required
- The system will also update the Contact History register to keep a log of who got what letter, on what date
- No need to address labels as letters are formatted to fit into window faced envelopes

The screenshot displays the 'InterAcct IA-Demo - [SELECT EMAIL/LETTER - display]' window. The interface includes a menu bar (File, Record, Edit, View, Go, Advanced, Menu, Graph, Design, Help) and a toolbar with various icons. The main configuration area contains the following fields and options:

- Purpose ?**: LETTER (selected), Letter Print
- Basis**: BOTH, Select Company Contact name
- All Contacts ?**: SELECT, Select Contacts
- Run No**: 100000
- Date Run**: Wed 23-Nov-2011
- Employee**: MARK.W
- Letter**: TRIAL, Text commences as Thank you for your enquiry
- Letter Text Date**: 24 November, 2011
- Greeting ?**: Dear
- Top of Form**: 9
- Count #**: [empty field]
- Comments**: New Web Site - All Clients & Prospects

A 'Menu' pop-up is visible, listing the following steps:

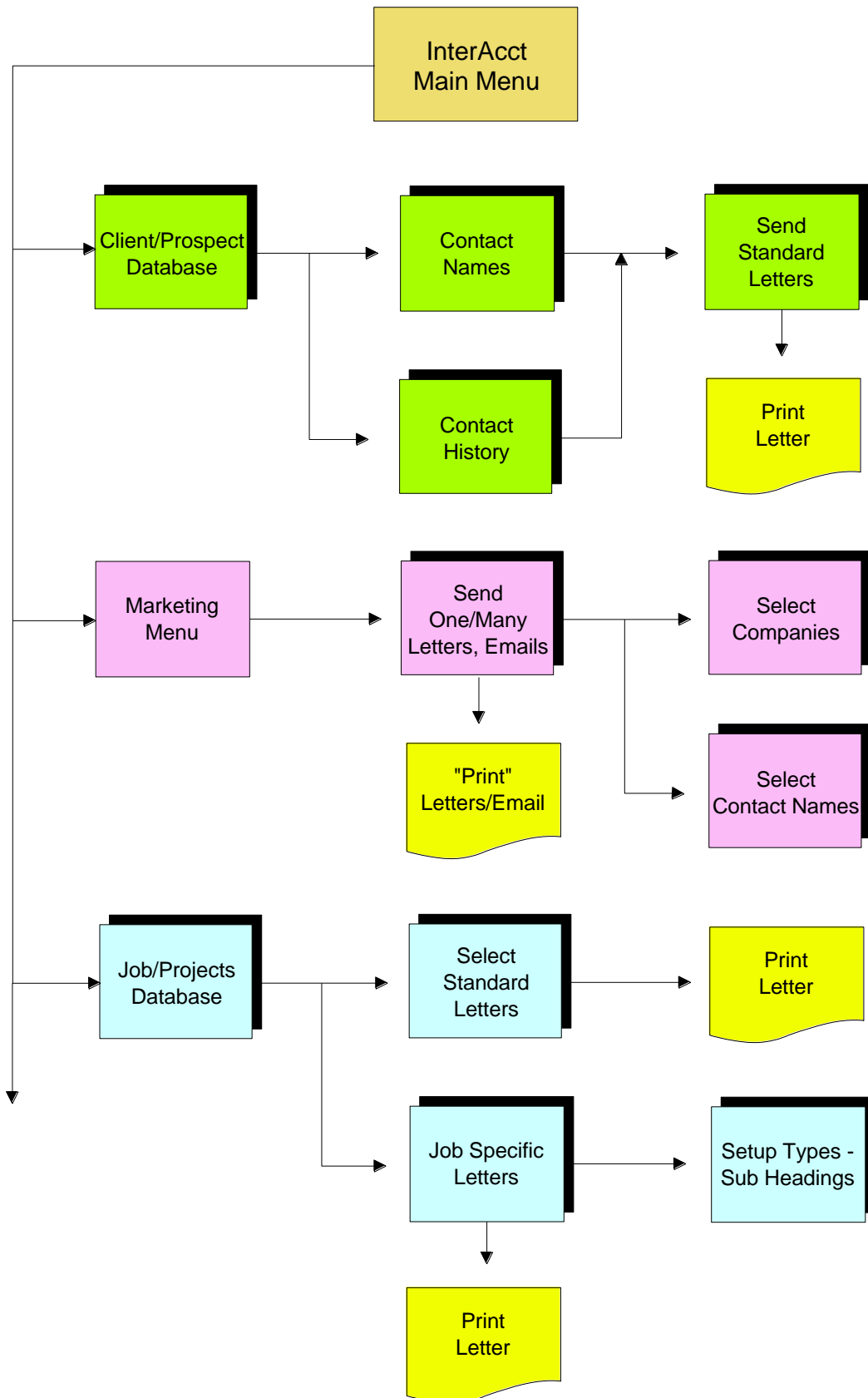
1. Select Names
2. Select Contacts
3. Create Contact History
4. Letter Text
5. Prepare Listing
6. Names Pre Listing
7. Print : Letters

On the right side, a 'Purpose ? - ALLOWED VALUES' table is shown:

	Value	Description
1	EMAIL	EMail List
2	LABEL	Address label
3	LETTER	Letter Print

At the bottom of the window, there are buttons for 'Form help', 'Field help', 'Printer Details', and 'Field-Selections'.

Flow Chart



The Secret is out...

When I receive a new sales enquiry for the InterAcct system, what I typically do is...

1. Input the normal Business Card details into the Database –
 - Updates my "**Hot Prospect**" list
 - Define the Lead Origin for **Post Promotional Analysis** purposes
 - Automatically updates **Quick Searches** on First Name, Surname, Business Name, Phone Number, EMail Address, etc.
2. Enter the Contact History, and next Follow Up Date -
 - updates my **Follow Up Diary**
 - updates my **Key Performance Analysis** - sales activities
3. Print one of my standard Letters with only minimal keystrokes –
 - For example, "*Please see attached our Cost Estimate...*"
 - Letters can also be **emailed**, if required
4. Create an initial Cost Estimate (Quotation) -
 - **Print** as well as Email the Cost Estimate
 - Updates my **Quotations Register**
 - Updates my various Daily Key Performance Analysis (**KPI's**)

The whole process only takes me a matter of minutes.

The personalised covering letter fits neatly into an A4 window faced envelope, along with the Cost Estimate.

It is very time efficient to create a professional response to an enquiry.

One-Off Letter Set Up

InterAcct IA-Demo - [SETUP LETTER SENT - display , Corporate Enterprises Pty Ltd, Trevor Jo]

File Record Edit View Go Advanced Menu Graph Design Help

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Letter	<input type="text" value="FLYER"/>  I recently sent you an email	Date Sent	<input type="text" value="Wed 23-Nov-2011"/>
Date Text	<input type="text" value="24th November, 2011"/>	Person	<input type="text" value="MARK.W"/>
Contact Name	<input type="text" value="Ken Basworth"/> <input type="text" value="Sales Manager"/> <input type="text" value="Corporate Enterprises Pty Ltd"/> <input type="text" value="3/556 Andrews Road"/> <input type="text" value="Cnr Wetherill Street"/> <input type="text" value="MOSMAN"/> <input type="text" value="NSW"/> <input type="text" value="2088"/>		
Greeting	<input type="text" value="Dear"/> <input type="text" value="Ken"/>		
Signed by	<input type="text" value="Mark Wetherspoon"/> <input type="text" value="Salesperson"/>	Menu 1. Print : Letter 2. View : Letter Text	
Comments	<input type="text"/>		

Letters

Form help **Field help**

This file is used for selecting a Standard letter to be sent to a Contact Name.

At the next menu, you can then print your letter, or amend the text of that standard letter.

23 November, 2011

Mr Jamsheed Akbar
Manager
Everything In Sight
Shop 26, The Village Shopping Centre
Charles Hackett Dr
ST MARYS NSW 2760

Dear Jamsheed,

Please find enclosed our initial Cost Estimate for your InterAcct system.

This was emailed to you previously along with a copy of the "*Products & Services*" Agreement. This covers matters like support, hourly charges, and free software enhancements.

Further information may be obtained from our web site in the form of

1. Downloading Software Profiles (best printed to a colour printer)
2. Demonstration Video's, and
3. Numerous "News Snippets" - including our "Blog" area.

See the 'button' - "Click here to Start" (for an introductory video).

Please call me if I can be of any further assistance. Thank you.

Regards,

Clive Rainbow
Director, Sales & Marketing

P.S. This letter was created on our InterAcct system !!