

Tips and Techniques for Creating CampTrak Thank You Letter Templates

Begin with the form that you see when you click the **Print Receipt** button the on Donor | Gifts tab. This will give you the precise names of the fields you will need when you insert bookmarks into your thank you letter template(s) and show you how the data is formatted when it is inserted into those bookmarks.

Gift Receipt			
For this export to work, there must be a .dot file in the word template directory with bookmarks that match the names of these fields.			
<input type="button" value="Close"/>			
<input type="button" value="Export"/>			
FederalTaxID	39-123456		
RecordId	47	GiftId	23
Salutation	Dear George	DateOfGift	May 31, 2002
FormalSalutation	George & Lynn Anderson	AmountOfGift	\$100.00
InformalSalutation	Dear Lynn & George	CheckNumber	12345
Name	George Anderson	InMemorialOf	Mother
FirstName	George	NextDueDate	December 30, 2002
LastName	Anderson	NextDueAmount	\$100.00
Company		PledgeTotalGiven	\$100.00
Address	8361 Winding Road	PledgeTotalRemaining	\$900.00
City	Appleton, WI	PrimaryMOR	George & Lynn Anderson
ZipCode	54912	PrimaryChurch	St Pauls Lutheran Church
GiftCategory	Individuals & Households, Undesignated, Unknown Source		
GiftCategoryChoice	Individuals & Households	MonthToDate	\$200.00
GiftAllocation	Undesignated	YearToDate	\$300.00
GiftSubAllocation	Unknown Source	InHonorOf	
InternalNotes			
ExternalNotes			
ThankYouNote	Thank you for your generous gift!		

Then, open a new blank document with MS Word as a template. Setup your page margins, size and source...you might setup to use letterhead from your printer's manual feed, for example. If you are not using letterhead, create the heading that identifies your camp, add a graphic element, etc. Insert a field to print the system date in an appropriate spot...use the field options to format as MMM d, yyyy.

Now type the letter as you want it to read and look using the bookmark names where you want to insert data from the gift record, for example: "Thank you for your gift of AmountOfGift".

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Setup MS Word to show bookmarks from Tools | Options | View.

Finally, replace each bookmark name with an actual bookmark as follows...

1. Highlight a bookmark name
2. From the toolbar Insert | Bookmark
3. Type the bookmark name exactly as shown above (Add a sequential digit for repeat uses)
4. Click **Add** to insert the bookmark

Additional tips about bookmarks...

- Remember to show bookmarks using the View tab at Tools | Options
- You must add a sequential digit to the bookmark name to use it a second, third, time in a template
- Choose the Sort By Location option on the Insert | Bookmarks form to see your bookmarks in the order that you are using them
- In the Insert | Bookmarks form you can highlight a bookmark and click **Go To** to see where it is used

Tips about saving templates...

- Must be saved as a template type file (ends in .dot)
- And saved in the MS Word General Templates folder (using the .dot file type will default to this directory)