

EMPOWERED

2025 | USER CONFERENCE | DETROIT, MI

LETTER TEMPLATES WORKSHOP: BUILD & AUTOMATE YOUR COMMUNICATIONS

PRESENTED BY

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akoyago

LEARNING OBJECTIVES

- Create a tailored system view for Letters to organize and manage templates
- Format Word documents to properly insert and configure merge fields
- Build, save, and publish a Letter Template for use in future mailings

PREREQUISITES

- Must be a system customizer (to create system views)
- Sample Word document

OVERVIEW OF LETTER TEMPLATES

WHAT

- Create documents in bulk from akoyaGO CRM

HOW

- Start from a template created in Microsoft Word
- Use dynamic fields to insert data from records

END RESULT

- Batch print PDFs for mailings
- Individual letters are saved to the akoyaGO record (in an editable Word file format)

LETTER TEMPLATE EXAMPLES

- Gift Acknowledgements/Thank You letters
- Grant Award/Denial notices
- Grant Terms/Agreements
- Scholarship notifications
- Letters to fundholders

WHY LETTER TEMPLATES?

- Add dynamic content
- Adjust any language in the template
- Print in bulk or one-off

Tip

Letter Templates are out-of-the-box functionality with akoyaGO. This tool is fully supported and encouraged, in comparison to custom flows.

GETTING STARTED

1. Start with your Word document and determine what dynamic fields you need
2. Prepare your system view
3. Insert dynamic fields in Word
4. Upload to Letter Templates table
5. Test + run!



- Identify the dynamic fields
- What info do we need?
- Which table(s) do we need to reference?
- Is any logic needed?
- Any other changes?

[Date]

[Name]

[Address]

[City], [State] [ZIP]

Dear [First Name],

On behalf of the Empowered Community Foundation, I want to extend our heartfelt thanks for your generous gift of [amount] received on [date]. Your support plays a vital role in helping us strengthen our community and advance our mission to help foundations achieve their philanthropic goals through effective practices,

Your contribution enables us to help organizations achieve their philanthropic goals and make a positive impact on the world, and it is through the generosity of donors like you that we are able to make a meaningful and lasting impact.

Please keep this letter as an official acknowledgement of your donation. No goods or services were provided in exchange for your gift, and your contribution is fully tax-deductible as allowed by law. Our federal tax ID number is 99-9999999.

Once again, thank you for your commitment to our community. We are deeply grateful for your partnership and belief in our work.

Warm regards,

Elizabeth Burger

Project Manager

The Empowered Foundation

LETTER TEMPLATES – SYSTEM VIEWS

- System Customizer role required to create/edit system views
- Define which system view the Letter Template should be run from
- View must contain **all** fields that you need in the letter template

Best Practice

It is recommended to configure system views on child record tables to enable easy referencing of related parent records.

Ex. Gift Payment can reference gift. Payment and Requirement can reference Request.

LETTER TEMPLATES – SYSTEM VIEWS

The image shows a transition from a system view menu to a data table. On the left, a menu lists four system views: 'Gift Payments that Qualify for Foundation Mat...', 'Gift Payments to Send to Accounting', 'Gift Payments with no Thank You date' (highlighted with a red box), and 'GOfund Gift Export View'. A green arrow points to the right, where a data table is shown. The table has columns for Donor, Street 1, Street 2, City, State/Province, and ZIP/P. A 'Save as...' dialog box is overlaid on the table, with a red box around it. The dialog has a 'Name *' field containing 'Gift Payments to be Acknowledged' and a 'Description' field. The 'Save' button is highlighted in purple. In the background, the 'Save As' button in the table's toolbar is also highlighted with a red box.

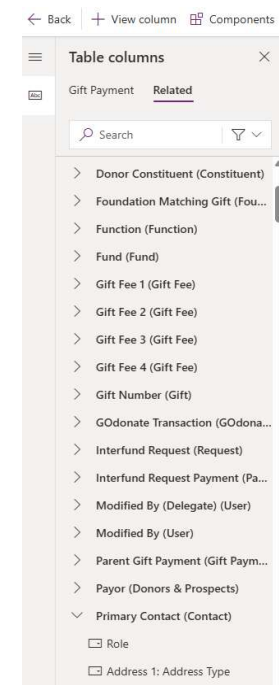
| Donor | Street 1 (Donor) | Street 2 (Donor) | City (Donor) | State/Province (...) | ZIP/P |
|----------------------|---------------------|------------------|--------------|----------------------|-------|
| Hon. Marcus Aurelius | 555 Caesar Way | | Sioux Falls | SD | 57107 |
| Jennifer Tenn | | | Saint Joseph | MI | 49085 |
| The Tenn Family | | | | | |
| Hadley | | | | | |
| Jennifer | | | Saint Joseph | MI | 49085 |
| Sara V | | | Schenectady | NY | 12345 |
| Mr. Na | Building 3, Floor 2 | | Lakeside | CA | 92040 |
| Mrs. Na | | | | | |
| Mrs. Na | | | | | |
| Mrs. Na | | | | | |
| Mrs. Na | | | | | |
| Mrs. Na | | | | | |
| Eric | | | | | |

Tip

Start from an existing System View and "Save As" a new view.

LETTER TEMPLATES – SYSTEM VIEWS

- Choose all fields you'll need
- May need to choose from a **Related** column
- Be specific – if you need a donor's first name, make sure it's the **first** name!



LETTER TEMPLATES – DYNAMIC FIELDS

- Insert > Quick Parts > Merge Field
- Insert "Field Name"
This must be an **EXACT** match to the column in the system view
- Proofread and save the document

Best Practice

To ensure your values match exactly, keep your System View open while filling in the dynamic field names in word.

LETTER TEMPLATES – DYNAMIC FIELDS

July 8, 2025
«Donor»
«Street 1 (Donor)»
«City (Donor)», «State/Province (Donor)»

Field

Please choose a field

Categories: (All)

Field names:

- Eq
- FileName
- FileSize
- Fill-in
- GoToButton
- GreetingLine
- Hyperlink
- If
- IncludePicture
- IncludeText
- Index
- Info
- Keywords
- LastSavedBy
- Link
- ListNum
- MergeField

Field properties

Field name: ZIP/Postal Code (Donor)

Format: (none)

Field options

Preserve formatting during updates

Gift Payments to be Acknowledged*

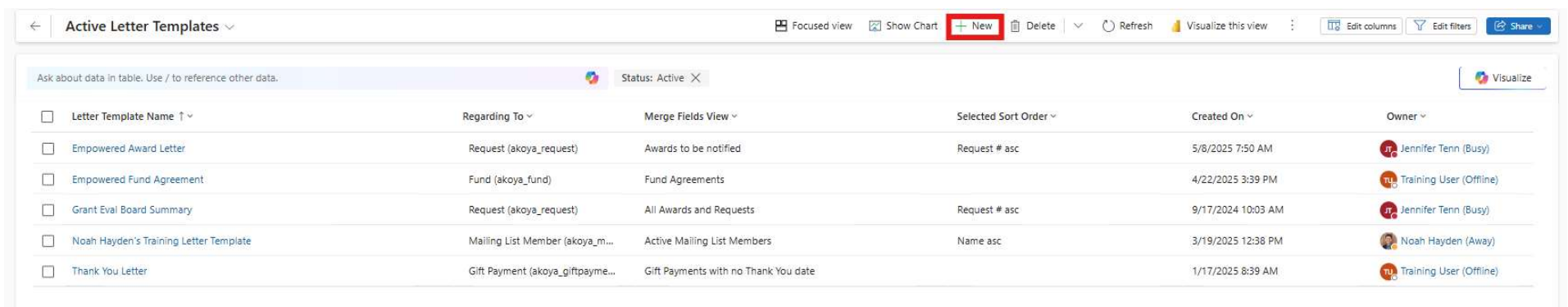
Show As Show Chart + New Generate Letters Delete

Ask about data in this table. Thank-you Date: Does not contain data

| Amount | Donor | Street 1 (Donor) | Street 2 (Donor) | City (Donor) | State/Province (Donor) | ZIP/Postal Code (Donor) |
|----------|---------------------------|-------------------|------------------|------------------|------------------------|-------------------------|
| \$200.00 | Hon. Marcus Aurelius | 555 Caesar Way | | Sioux Falls | SD | 57107 |
| \$150.00 | Jennifer Tenn | 123 Main Street | | Saint Clair S... | MI | 48081 |
| \$200.00 | 100 Women of Harvey | 2 Grover Cross... | | Missoula | MT | 59806 |
| \$100.00 | Aaren Braidwood & Boon... | | | Minneapolis | MN | 55425 |
| \$150.00 | Jennifer Tenn | 123 Main Street | | Saint Clair S... | MI | 48081 |

LETTER TEMPLATES – NAVIGATING IN akoyaGO

- Navigable from Donor Management, Grants Management, and Fund Management areas under "Mailings" on sidebar



Active Letter Templates

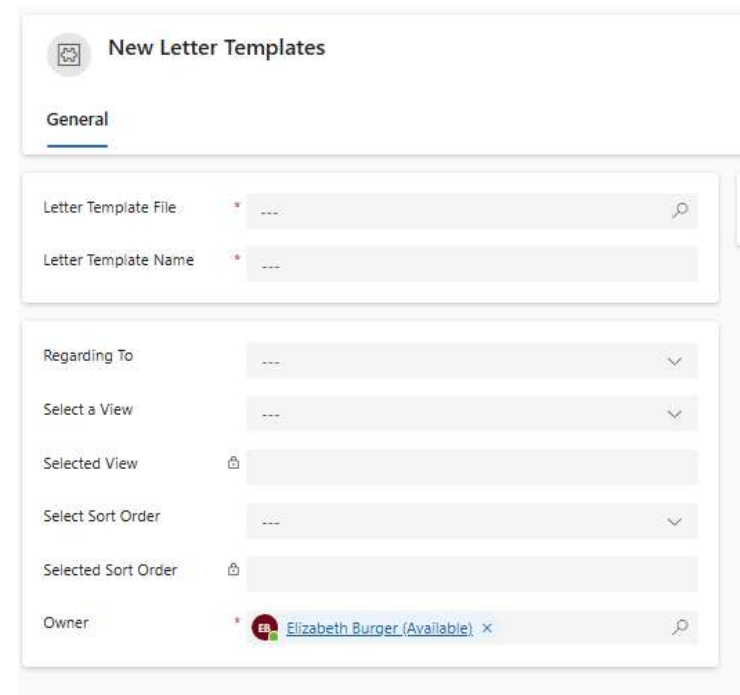
Focused view Show Chart **+ New** Delete Refresh Visualize this view Edit columns Edit filters Share

Ask about data in table. Use / to reference other data. Status: Active

| Letter Template Name | Regarding To | Merge Fields View | Selected Sort Order | Created On | Owner |
|---|-----------------------------------|--------------------------------------|---------------------|--------------------|-------------------------|
| <input type="checkbox"/> Empowered Award Letter | Request (akoya_request) | Awards to be notified | Request # asc | 5/8/2025 7:50 AM | Jennifer Tenn (Busy) |
| <input type="checkbox"/> Empowered Fund Agreement | Fund (akoya_fund) | Fund Agreements | | 4/22/2025 3:39 PM | Training User (Offline) |
| <input type="checkbox"/> Grant Eval Board Summary | Request (akoya_request) | All Awards and Requests | Request # asc | 9/17/2024 10:03 AM | Jennifer Tenn (Busy) |
| <input type="checkbox"/> Noah Hayden's Training Letter Template | Mailing List Member (akoya_m...) | Active Mailing List Members | Name asc | 3/19/2025 12:38 PM | Noah Hayden (Away) |
| <input type="checkbox"/> Thank You Letter | Gift Payment (akoya_giftpayme...) | Gift Payments with no Thank You date | | 1/17/2025 8:39 AM | Training User (Offline) |

LETTER TEMPLATES – UPLOAD IN akoyaGO

- Select Letter Template File
 - Click "+New"
 - Name it first and save
 - Then upload your document
- Name the Letter Template
- Select "Regarding To" (table) and View

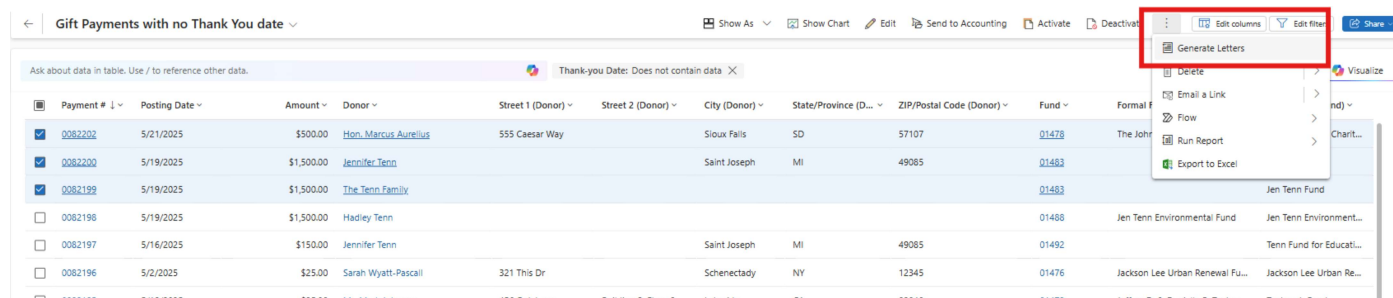


The screenshot shows the 'New Letter Templates' form in the akoyaGO system. The form is titled 'New Letter Templates' and has a 'General' tab selected. It contains several input fields and dropdown menus:

- Letter Template File:** A text input field with a search icon on the right.
- Letter Template Name:** A text input field with an asterisk indicating it is required.
- Regarding To:** A dropdown menu with a search icon on the right.
- Select a View:** A dropdown menu with a search icon on the right.
- Selected View:** A text input field with a lock icon on the left.
- Select Sort Order:** A dropdown menu with a search icon on the right.
- Selected Sort Order:** A text input field with a lock icon on the left.
- Owner:** A dropdown menu with a search icon on the right, currently showing 'Elizabeth Burger (Available)' with a close icon on the right.

RUN A LETTER TEMPLATE

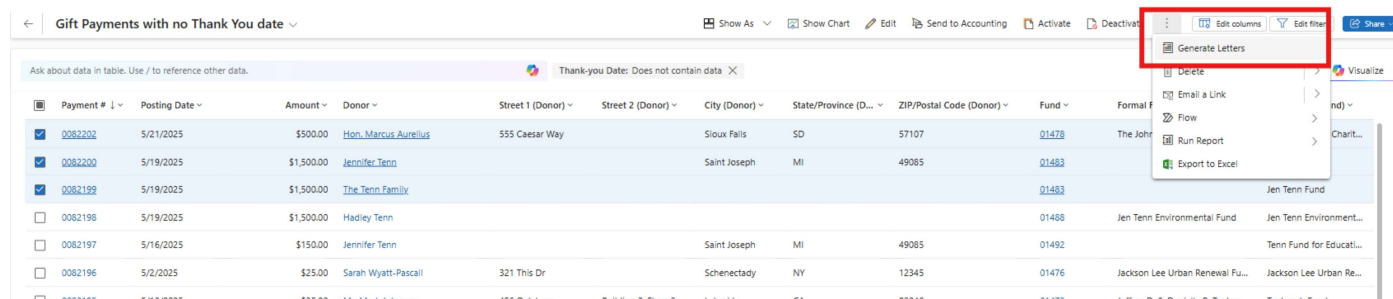
- Navigate to the table and view defined in the Letter Template Record
- Select records to generate letters for
- Click "Generate Letters" (may need to expand menu)



The screenshot shows a data table titled "Gift Payments with no Thank You date". The table has columns for Payment #, Posting Date, Amount, Donor, Street 1 (Donor), Street 2 (Donor), City (Donor), State/Province (Donor), ZIP/Postal Code (Donor), Fund, and Formal F. Three rows are selected, indicated by blue checkmarks in the first column. A context menu is open over the selected rows, with the "Generate Letters" option highlighted in a red box. Other options in the menu include Delete, Email a Link, Flow, Run Report, and Export to Excel.

| Payment # | Posting Date | Amount | Donor | Street 1 (Donor) | Street 2 (Donor) | City (Donor) | State/Province (Donor) | ZIP/Postal Code (Donor) | Fund | Formal F |
|---|--------------|------------|----------------------|------------------|------------------|--------------|------------------------|-------------------------|-------|---------------------------------|
| <input checked="" type="checkbox"/> 0082202 | 5/21/2025 | \$500.00 | Hon. Marcus Aurelius | 555 Caesar Way | | Sioux Falls | SD | 57107 | 01478 | The Joh... |
| <input checked="" type="checkbox"/> 0082200 | 5/19/2025 | \$1,500.00 | Jennifer Tenn | | | Saint Joseph | MI | 49085 | 01483 | |
| <input checked="" type="checkbox"/> 0082199 | 5/19/2025 | \$1,500.00 | The Tenn Family | | | | | | 01483 | Jen Tenn Fund |
| <input type="checkbox"/> 0082198 | 5/19/2025 | \$1,500.00 | Hadley Tenn | | | | | | 01488 | Jen Tenn Environmental Fund |
| <input type="checkbox"/> 0082197 | 5/16/2025 | \$150.00 | Jennifer Tenn | | | Saint Joseph | MI | 49085 | 01492 | Tenn Fund for Educat... |
| <input type="checkbox"/> 0082196 | 5/2/2025 | \$25.00 | Sarah Wyatt-Pascall | 321 This Dr | | Schenectady | NY | 12345 | 01476 | Jackson Lee Urban Renewal Fu... |

RUN A LETTER TEMPLATE



The screenshot shows a software interface with a table titled "Gift Payments with no Thank You date". The table has columns for Payment #, Posting Date, Amount, Donor, Street 1 (Donor), Street 2 (Donor), City (Donor), State/Province (Donor), ZIP/Postal Code (Donor), Fund, and Formal Name. Three rows are selected with checkboxes. A dropdown menu is open over the table, with the "Generate Letters" option highlighted in red. Other options in the menu include Delete, Email a Link, Flow, Run Report, and Export to Excel.

| Payment # | Posting Date | Amount | Donor | Street 1 (Donor) | Street 2 (Donor) | City (Donor) | State/Province (Donor) | ZIP/Postal Code (Donor) | Fund | Formal Name |
|---|--------------|------------|----------------------|------------------|------------------|--------------|------------------------|-------------------------|-------|---------------------------------|
| <input checked="" type="checkbox"/> 0082202 | 5/21/2025 | \$500.00 | Hon. Marcus Aurelius | 555 Caesar Way | | Sioux Falls | SD | 57107 | 01478 | The John... |
| <input checked="" type="checkbox"/> 0082200 | 5/19/2025 | \$1,500.00 | Jennifer Tenn | | | Saint Joseph | MI | 49085 | 01483 | Jen Tenn Fund |
| <input checked="" type="checkbox"/> 0082199 | 5/19/2025 | \$1,500.00 | The Tenn Family | | | | | | 01483 | Jen Tenn Fund |
| <input type="checkbox"/> 0082198 | 5/19/2025 | \$1,500.00 | Hadley Tenn | | | | | | 01488 | Jen Tenn Environmental Fund |
| <input type="checkbox"/> 0082197 | 5/16/2025 | \$150.00 | Jennifer Tenn | | | Saint Joseph | MI | 49085 | 01492 | Tenn Fund for Educat... |
| <input type="checkbox"/> 0082196 | 5/2/2025 | \$25.00 | Sarah Wyatt-Pascall | 321 This Dr | | Schenectady | NY | 12345 | 01476 | Jackson Lee Urban Renewal Fu... |

- Select the correct template and click Generate
- A link to the letter template session will appear in a banner on screen
- Once complete, an in-app notification will appear in the 'bell icon' notification center

LETTER TEMPLATE SESSION

Generates printable PDF

- On the “Documents” tab of the “Letter Template Session”
- Contains letters for **all** selected records

Autosaves to Individual Records (Editable)

- Individual letters are saved to the Documents tab of the regarding record.
- Any one-off changes to the individual letter can be made here (saves as a Word doc)

Viewing Previously Generated Letters

- PDF containing all letters run during the session can be accessed in the Letter Template Session table
- Individual letters can be accessed from the corresponding record

TIPS FOR SUCCESS!

| Create System Views | Establish Process | Naming Convention |
|--|---|--|
| <ul style="list-style-type: none">• When creating system views for letters, remember to include all fields you will reference as merge fields• Also consider what filters will help you narrow down which records to select | <ul style="list-style-type: none">• Established Shared Document location for your organization• Only "approved" letters are included in the agreed upon location | <ul style="list-style-type: none">• Agree on naming convention for Letter Template Files <p>Example: (Entity)_(View) <i>Gift Payment_Awards to be Notified</i></p> |

Best Practice

- Establish internal guidelines for staff to create consistent letter templates for external stakeholders.
- When using a system view with filters, remember to bulk edit your filtered field to ensure that you do not generate letters more than once.

Ex. Fill in Thank-you Date after running a batch of Gift Acknowledgement letters with no Thank-you Date.

THANK YOU

Presented by

Elizabeth Burger
Project Manager