Product White Paper:

Correspondence and Mail Merges

Automated Letter and Email Correspondence in Grant Edge NXT

Last Updated March 2022

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Overview

Grant Edge NXT provides users with powerful automated functions for sending emails and generating letters. Grant Transmittal Letters, Web Applicant Award notifications, Fundholder Grant Processing confirmations, and the like can be generated, printed, emailed, and tracked in GE.

This document discusses how Grant Edge Correspondence functionality is intended to be used. Covered topics include:

- Understanding Correspondence in GENXT
- Configuring correspondence templates (including fields available from GE Queries)
- Generating documents and emails on record screens, processing screens, and in batches
- Best practices for configuration and processing of GE Correspondence

How Correspondence Works in GENXT

Microsoft Office Word Templates are used by Grant Edge NXT to create letters (Microsoft Word Documents), which are saved to NPact's cloud file servers. These generated documents are linked to specific records in your Grants database, and they can be downloaded and printed from GENXT.

These same Microsoft Office Word Templates can also be used to generate and send email messages, which are stored in your Grants database and linked to specific records. They can be viewed from GENXT's record screens as well.

Key Terms

The following terms are used throughout this document:

- **Queries** – dynamic data sets created in GE for accessing records (Grants, Constituents, etc.)
- **Correspondence** – Microsoft Word documents and emails created by Grant Edge NXT
- **Correspondence Templates** – Microsoft Word templates linked to GE Queries which are used to generate correspondence (documents and emails)
- **Mail Merge** – the process by which GENXT opens a template, applies merge fields from a query, and generates documents or emails

Record Types

In Grant Edge NXT, users can create correspondence for the record types listed here.

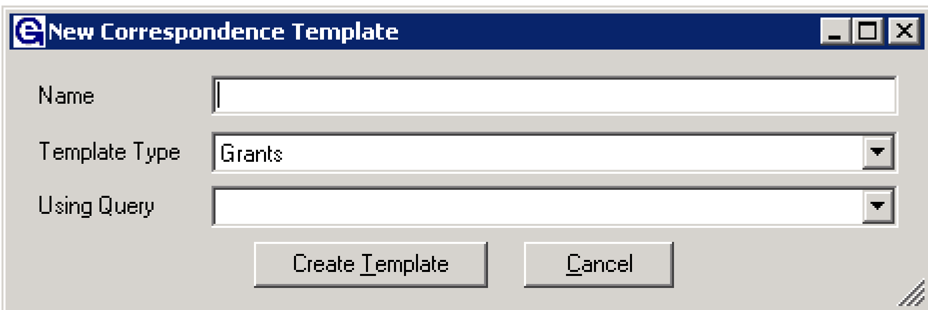
- **Constituents** (including Grant Recipients, Payees, Fiscal Sponsors, Fund Advisors, Applicants, Reviewers, and Spectrum Web Users)
- **Grants** (including all types, such as Standard, Transfer, Scholarship, etc.)
- **Proposals**
- **Scholarship Applications**
- **Web Applications** (including Scholarship Web Apps and Proposal/Grant Web Apps)

Configuring Correspondence Templates

NPact will soon develop new screens in Grant Edge NXT for managing Correspondence Templates, but at this time the Correspondence Templates must be managed in Admin View (also known as Grant Edge Classic).

Creating New Templates

In the Admin View, the “Admin” menu has a *Correspondence Templates* link which will open the list of correspondence templates. Click the “New Template” button and fill out the fields shown in the popup screen.

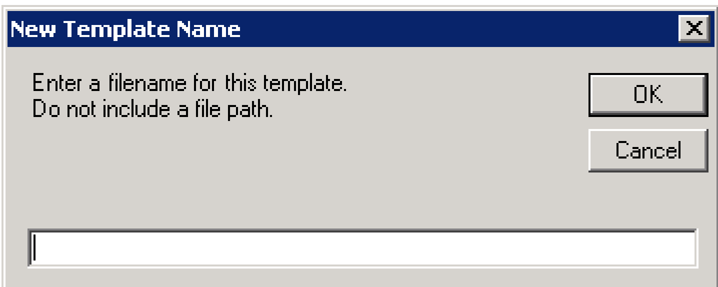


- **Name** – the name of the template as it will be shown throughout GE. This should be a meaningful name, such as “Spring 2022 Foundation Arts Award Acceptance Letter”, “Merit Scholarship Decline Letter”, “Standard Grant Transmittal Letter”, “Portal Access Approved”, etc.
- **Template Type** – these are the 5 record types for which GE has correspondence functions. You must select one of them (Constituent, Grant, Proposal, Scholarship, Web Application). When deciding the template type, think about which GE records will get correspondence documents attached to them.
    - **Constituents** – used for Constituent and Web User correspondence (typically email)
    - **Grants** – used for letters sent to Grant Recipients as well as Fundholder Requestor/Advisors on their grants
    - **Proposals** – used for correspondence sent to Applicants on Proposal records. This is also commonly used for correspondence sent to proposal/grant web applicants who submit web applications through Spectrum, since proposal workflow and review data is available on the Proposal record.
    - **Scholarship Applications** – used for correspondence sent to Scholarship Applicants. This is also commonly used for correspondence sent to scholarship web applicants who submit web applications through Spectrum, since scholarship workflow and review data is available on the Scholarship Application record.
    - **Web Applications** – used for corresponding with Spectrum Web Applicants *as it specifically relates to an application* (for example, acceptance/decline notifications). To generate correspondence for web applicants which is not specifically related to an application, consider using a Constituent template type rather than a Web Application template.

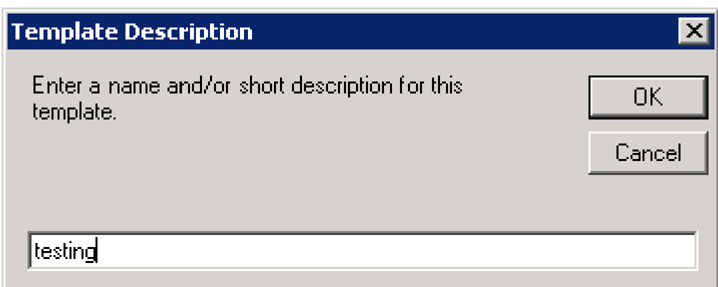
- **Using Query** – this is a list of GE Queries of the selected Template Type. Each record type has a "Default" query ("Default Grant Query", "Default Constituent Query", etc.) which has commonly required fields for correspondence mail merges. As a best practice, it is recommended that you use these "Default" queries when possible. If you do create your own queries for correspondence, you ***must*** include the record identifier for the record type (i.e., GrantId, ConstituentId, etc.).

Clicking the "Create Template" button will create a new template record in GE, and then GE will begin guiding you through the process of creating the Word template file.

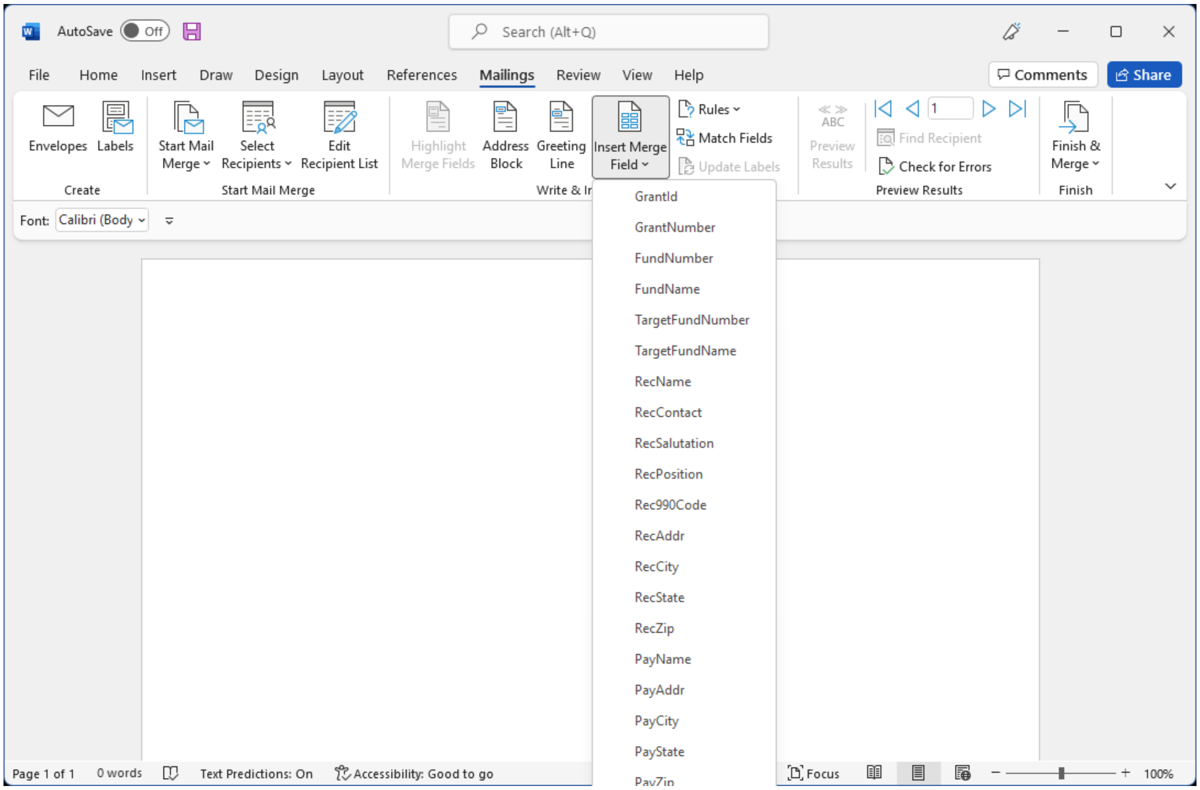
You'll need to set a filename:



And then set a Description:



Clicking OK creates a new Microsoft Word Template, links it to the GE Query fields, and opens the Template in Microsoft Word.



This is where you will create the letter template (or paste in a template from an existing template). The letter should include header and footer elements, and it can contain pictures. The images, colors, fonts, and other formatting will be included in the generated letter or email.

The “Insert Merge Field” button in the middle of the Microsoft Word toolbar can be used to add fields into the body of the letter. Save and Close Microsoft Word when you’ve finished editing the template.

Importing Existing Templates

Instead of starting from scratch, GE’s Admin View will also allow you to link to existing correspondence templates. In the “Admin” menu, the *Correspondence Templates* link will open the list of correspondence templates. Click the “Add Existing …” menu button and select the appropriate record type (i.e., “Add Existing Proposal Correspondence Template”).

Browse to the file folder containing the template and click on it. This will typically be in the M: or F: drive. Click the Open button to import the template. A screen is displayed with the template file name as the description. Either enter a description or use the existing file name. Click on the OK button and the template is added to GE.

Once the template is added, you’ll need to Edit it and confirm that the Merge Fields line up with the fields defined in the GE Query. To edit a template, select a template listed and click the “Edit Selected Template” button. This will launch Microsoft Word with the template opened. Look for any fields which are in an error state and replace them with available fields from the query.

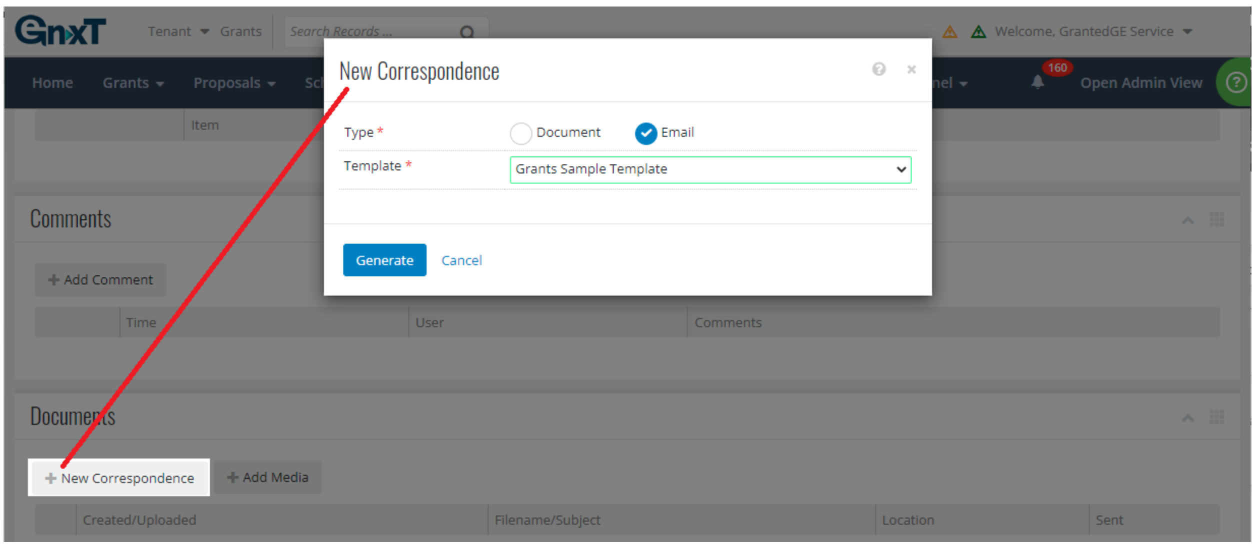
Generating Correspondence on Record Screens

Users can use the Correspondence Templates created in the previous steps to generate correspondence (email or letters) on the following record screens in GENXT:

- Grant record
- Proposal record
- Scholarship Application record
- Constituent record
- Submitted Web Application record (Proposals and Scholarships)

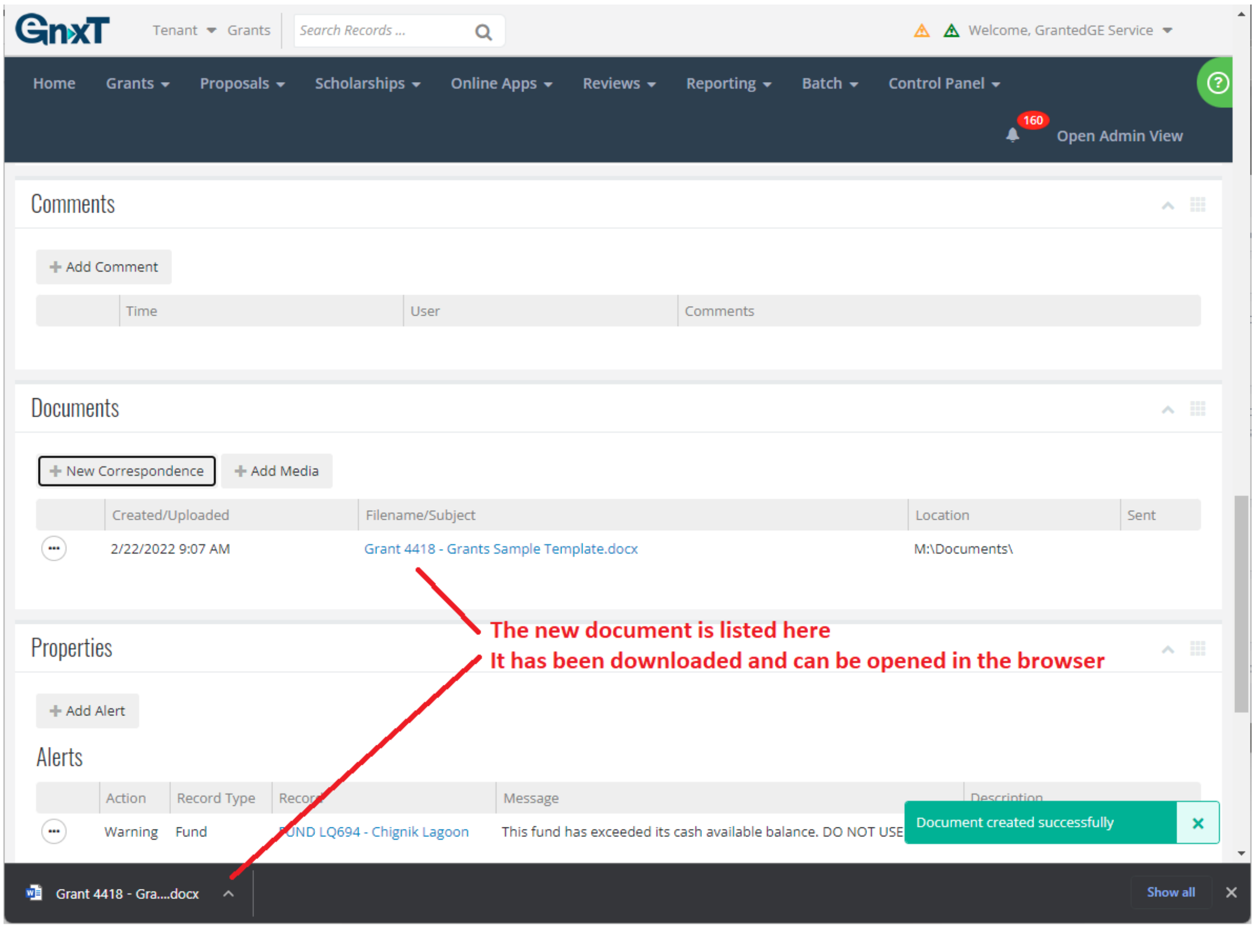
This processing is done in the record screen's "Documents" tile.

Start by opening the record, scrolling down to the "Documents" tile, and clicking the "Add Correspondence" button. Use the processing popup screen to select "Letter" or "Email" and choose one of the templates configured for the record type.

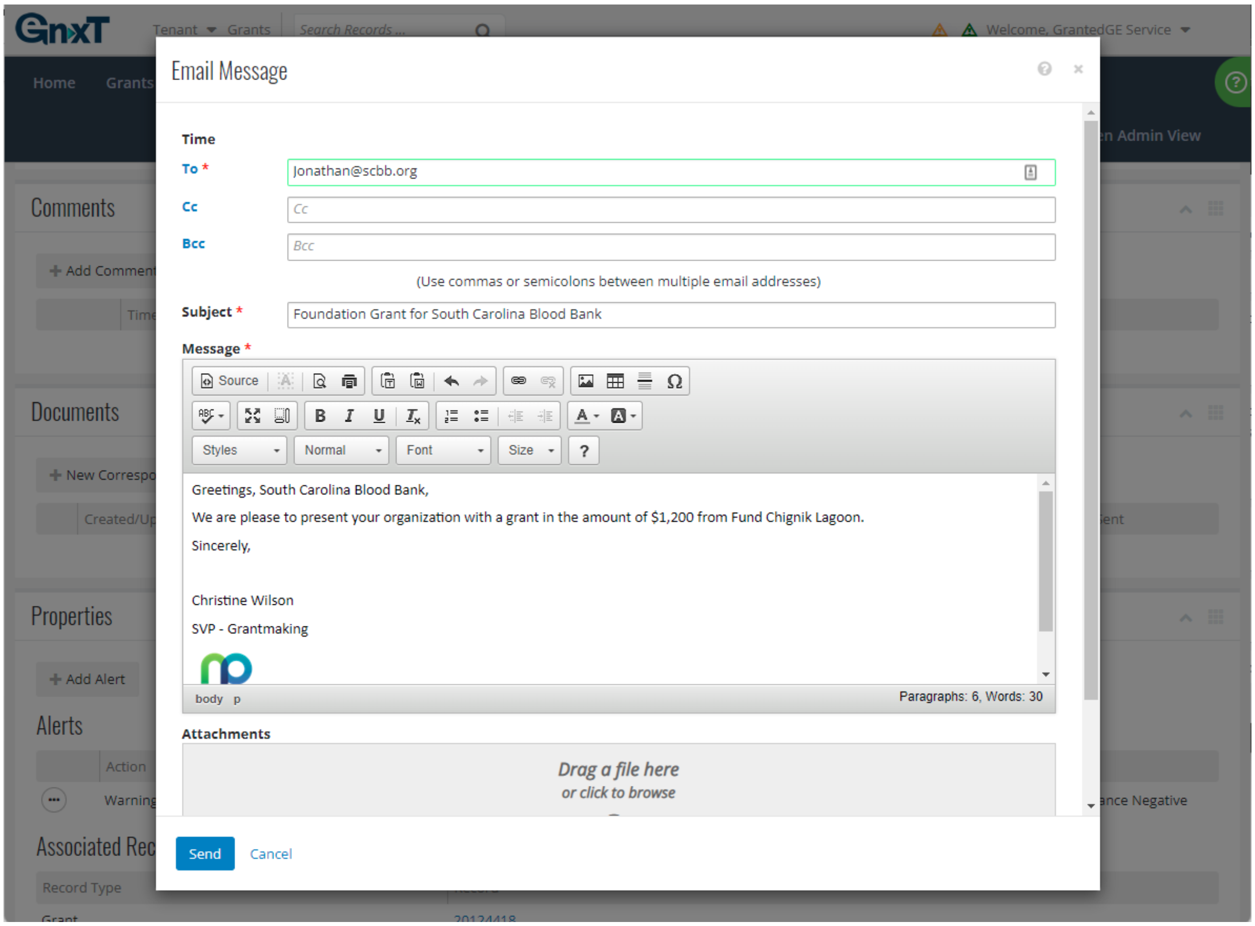


Click “Generate” to perform the mail merge. This will do one of the following:

- For Letters, this will create a new Word Document, save it to NPact’s cloud file server, link the file to the record, and download it to the browser. Note that this downloaded file is a local copy of the Word document, and this means that changes to this document can only be saved to the local copy in your computer’s *Downloads* folder. Locally modified documents are ***NOT*** saved to NPact’s cloud file servers.



- For Emails, this will perform the mail merge, save an initial copy of the email in your cloud Grants database, and will bring up the GENXT email editor. The merged message will be in the email body, and the HTML Email Editor will allow users to make changes to the email message, set the To Address, Subject, etc., and send the email message.



Generating Correspondence from the Web Processing Queue

GENXT's Web Processing Queue screen allows users to approve/decline web portal access for Spectrum Web Portal registrations. After portal access is approved or declined on the Web Processing Queue screen, GE users are given the option to notify the portal registrant that their access is approved/declined. This is accomplished via the same Correspondence popup screen described in the previous section.

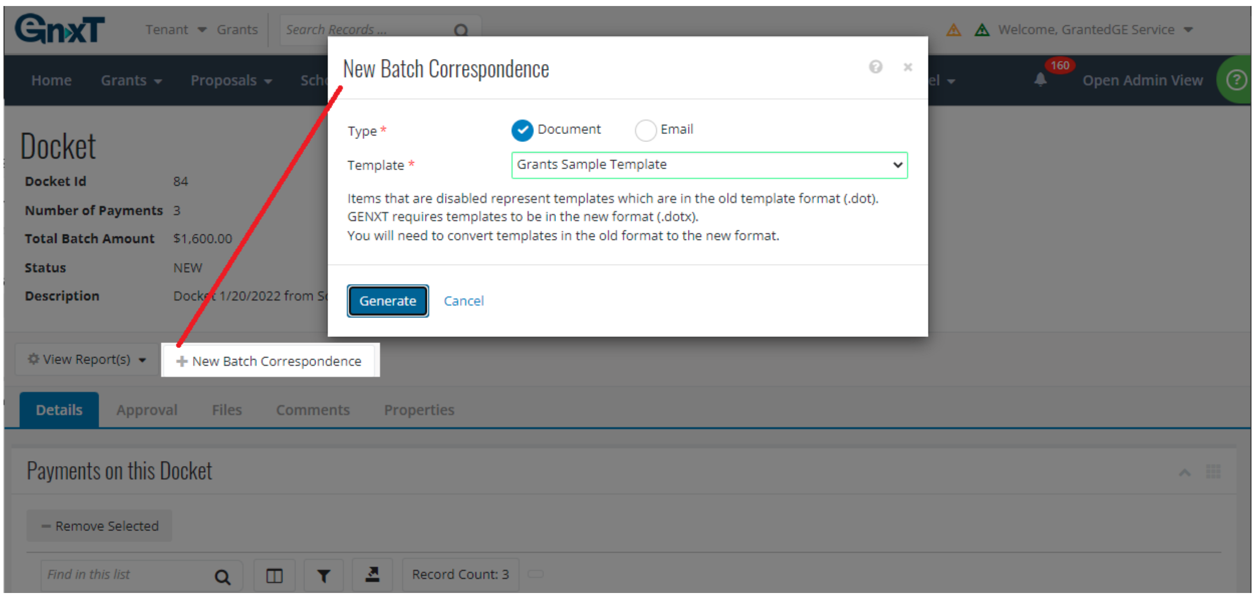
Note that Spectrum Web Portal users are linked to GE Constituents, so the Correspondence Templates which are available in this screen are the templates for Constituent records. As a best practice, NPact recommends that foundations create constituent correspondence templates called something like "Web Portal Access Notification" specifically for this purpose.

Generating Correspondence in Batches

In addition to creating correspondence documents and emails on record screens (one at a time), GENXT also allows foundations to generate correspondence in batch. There are several places in GENXT where this functionality is available (more will be added soon):

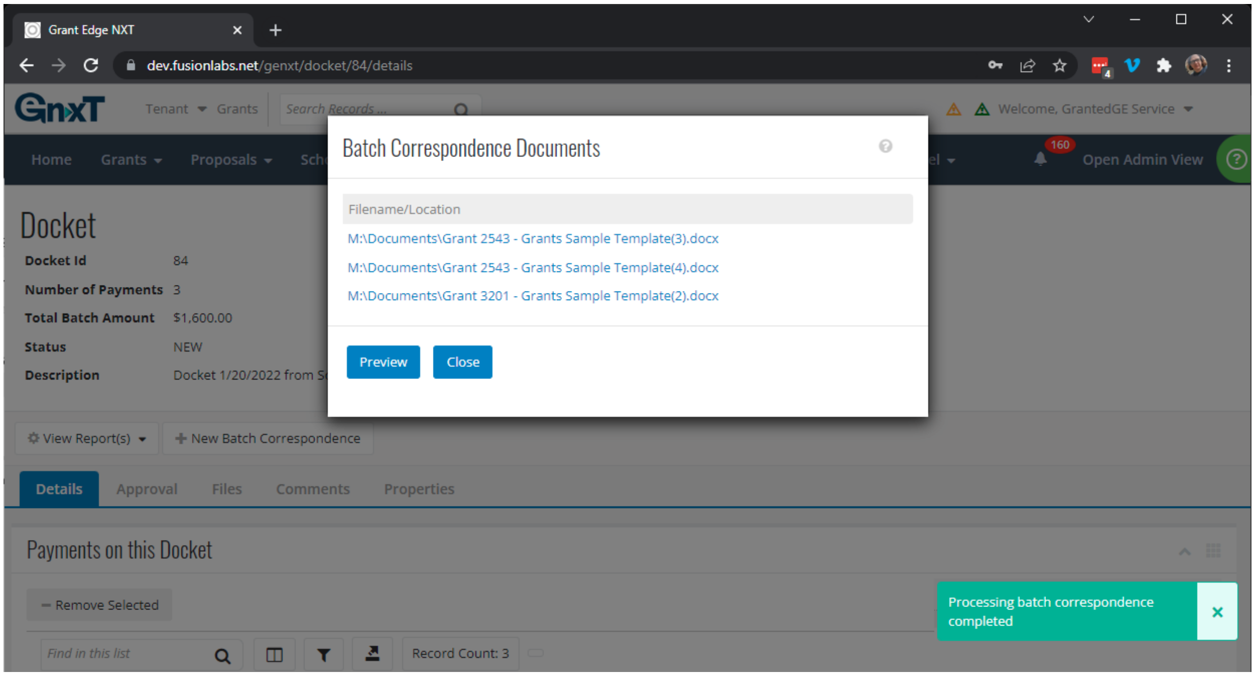
- Docket record – uses Grant correspondence templates
- Check Run record – uses Grant correspondence templates
- Committee record (Scoring menu) – uses Constituent correspondence templates
- App Group record (Scoring menu) – uses Web Application correspondence templates

To generate correspondence from a batch record, look for the "Generate Batch Correspondence button on one of the above batch record screens. Use the processing popup screen to select "Letter" or "Email" and choose one of the templates configured for the record type.



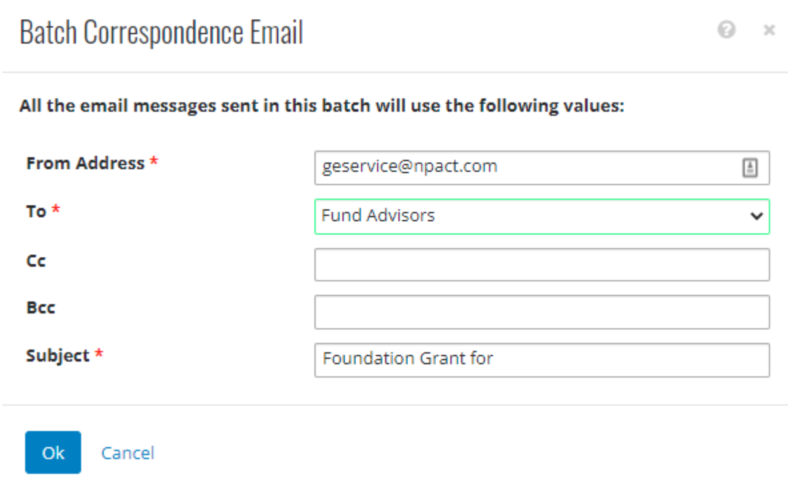
Click "Generate Correspondence" to perform the mail merge. This will do one of the following:

- For Letters, this will create new Word Documents for each record in the batch, save them to NPact's cloud file server, and link the files to their parent records. The user is then shown a list of the documents which were created, as shown here.

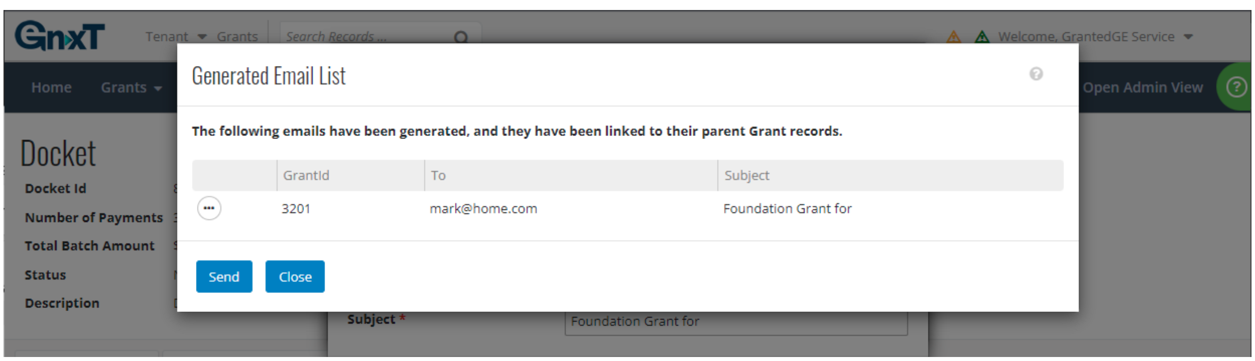


Users can click on any of the listed files to download them to their browser. For easy printing, the "Preview" button will create a single Word document containing all the documents generated by this batch process.
Note that any downloaded files are a local copies of Word documents, and this means that changes to these downloaded documents can only be saved to the local copies in your computer's *Downloads* folder. Locally modified documents are ***NOT*** saved to NPact's cloud file servers.

- For Emails, this will open a Batch Correspondence Email screen, where the From Address, To Address, CC, BCC, and Subject can be set.



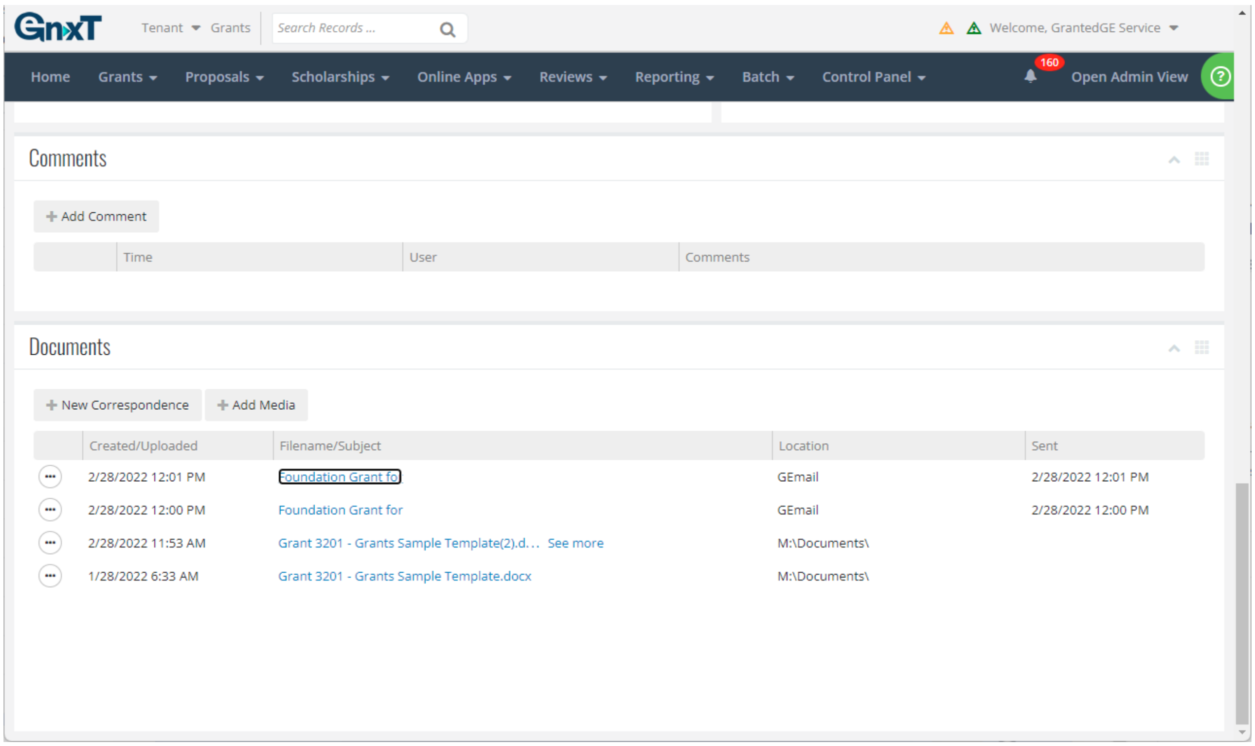
Clicking “Ok” will perform the mail merges, save copies of each email message to your cloud Grants database, and link these email messages to their parent records. The user is then shown a list of the emails which were generated, as shown below. At this point the emails have not yet been sent. Each email can be opened using the ellipsis menu item and edited before they are sent.



Clicking the “Send” button will send the email messages to the foundation’s email servers.

Viewing Correspondence on Record Screens

The functions in GENXT for generating correspondence allow users to see the letters and email messages at the time that they are generated. These documents and emails are linked to their parent records in your cloud Grants database, and they are listed on each record screen's "Documents" tile.



Note that the Documents tile on a record screen shows several different types of associated documents, including correspondence letters, correspondence emails, and manually attached Media files.

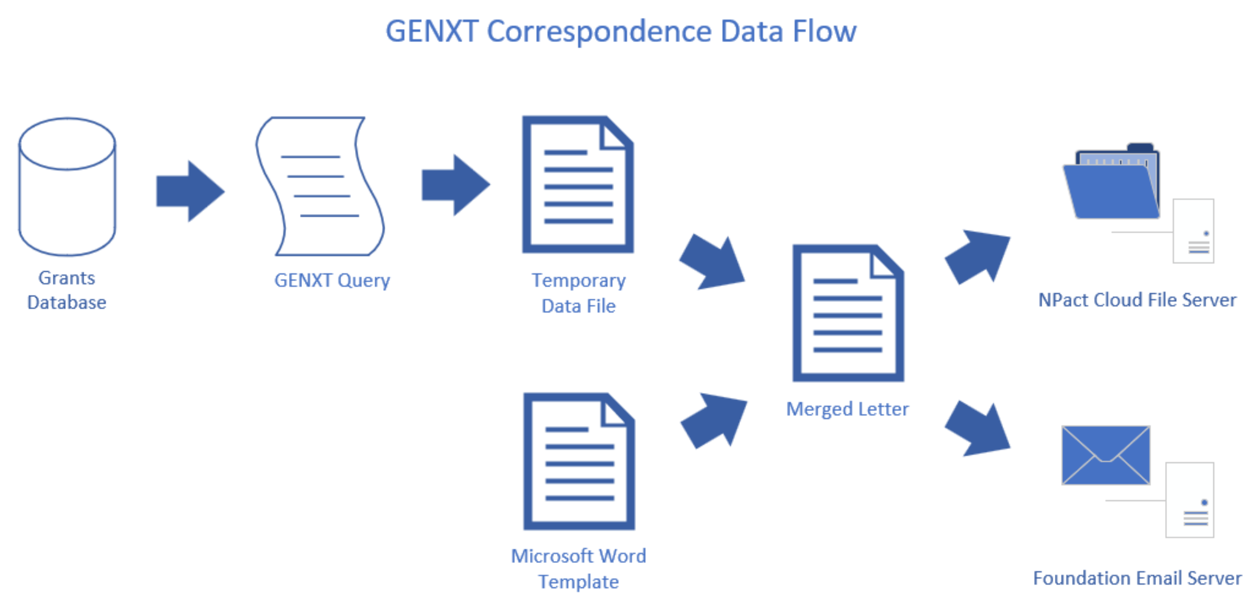
Technical Details

Data Flow

In GE's Correspondence functions, a query is used to create a temporary data file. GE opens the template, links it to the data file, and generates the document.

- If the correspondence function is for letters, the document is saved to the NPact secure cloud file servers.
- If the correspondence function is for email, the document is read and its contents are used in the body of an email message, which is sent to the foundation's email servers via secure SMTP.

The following diagram shows how data flows from a Grants database to a merged document.



Linking Documents and Records

Correspondence emails and documents are linked to the records for which they are generated. Each of the 5 correspondence record types have a database table linking a record ID with a document (including the full file path). (GRGrantCorrespondence, GRProposalCorrespondence, etc.)

Mail Merge Technology

Correspondence Templates are Microsoft Word Template files (*.dotx) created in Microsoft Office 2007 or newer. In GE's Admin View, mail merges are performed using a local installation of Office. In GENXT, mail merges are performed using OpenXML functions in the .NET Framework.

Data Security in NPact Hosting

Correspondence Data is secure throughout the entire data flow.

- GENXTAPI reads record data in GE queries using a database connection which is secured via HTTPS 2.0. Authorization Headers enforce GE user security.
- Microsoft Word Templates and Documents are stored on NPact's secure cloud file servers, which are secured with Windows Active Directory Groups. Authenticated NPact Foundation Cloud users are only given access to the files and templates for their foundation.
- For Email Correspondence, GENXTAPI connects to the foundation's SMTP servers using SSL on a secure port. (This is most often a third-party SMTP server, such as Microsoft's Outlook 365).

Troubleshooting

List of available templates is empty

If you're trying to perform a mail merge, but the processing popup screen has an empty list of available templates to use, this means that there are no active correspondence templates configured for that record type. For example, your foundation may have created correspondence templates for Grants and Web Apps, but not for Constituents. In this scenario, the GENXT Constituent record screen and the Web Processing Queue popup screen will not have any available templates.

The solution to this problem is to go into GE's Admin View, Admin menu, Correspondence Templates. Look for templates of the appropriate record type. If they're already there, make sure they're Active. If there aren't any records of the appropriate type, you'll need to create a new one.

Emails are not sent

Sometimes a correspondence email gets generated successfully, but the email doesn't get sent. These issues can be difficult to troubleshoot, but here are a few things you can try before opening a support ticket:

- Make sure that the email address to which the correspondence message was sent is a valid email address.
- In GE's Admin View, under the Config menu, open the Business Rules screen and go to the "Miscellaneous" tab. Check the email settings and make sure they're accurate.
- If the SMTP password for the SMTP User has changed on your mail server, you can change it here and try again.
- The "Test Email" link will allow you to send yourself a quick test email message to make sure the SMTP settings are correct.
- You can check the system logs in GENXT by navigating to the Control Panel, Admin menu, choose Logs, and select the System Logs tab. Email errors usually have "SMTP" in the log text, and mail merge issues are often logged with "File.IO" in the log text.

If none of the steps above resolved the issue, you'll need to open a support ticket with NPact to get it resolved by our support team.

Documents are not generated

If documents are not generated, look for the following issues:

- The Template file or the output path for saving Word documents might be inaccessible due to configuration issues. Check the system logs in GENXT by navigating to the Control Panel, Admin menu, choose Logs, and select the System Logs tab. File access issues are often logged with "File.IO" in the log text. If you see errors related to GENXT not being able to load a template file or save a document file, you'll need to open a support ticket with NPact to get it resolved by our support team.
- It's possible that the query used for generating correspondence does not include the record for which you're trying to create correspondence. Open the Admin Correspondence Templates screen in GE's Admin View, identify the query being used for the template, and then open that query to check whether the record is included in the output.

Documents tile on a record shows correspondence files as labels (not links)

When the list of documents is loaded on the Documents tile for a record screen (Grants, Constituents, etc.), the filenames in the list will be links if the files are accessible, and they will be labels if the link to the file cannot be resolved. If you're seeing lots of labels and not links, it's possible that your GENXT file security configuration is not properly set up. You'll need to open a support ticket with NPact to get it resolved by our support team.

"Default" queries are missing

If you're trying to set up a new Correspondence Template in GE, and the list of Queries doesn't contain a "Default" query for the record type you need, your Grants database might be outdated. "Default Grant Query", "Default Constituent Query", etc. should all be accessible, so please open a support case with NPact (see the support link in the Resources section below).

Additional Resources

For more information regarding Microsoft's mail merge functionality in Office, see Microsoft's documentation here:

https://support.microsoft.com/en-us/office/use-mail-merge-for-bulk-email-letters-labels-and-envelopes-f488ed5b-b849-4c11-9cff-932c49474705

To open a new support case with NPact, please enter the relevant information on our website:

https://www.npact.com/support