

## Setting up your own letterhead in PGdebt 8 and 9

It is possible to set up your own letterhead in PG8 and PG9. Be warned that it is very fiddly and time consuming, but it does only have to be done once. Then the new letterhead can be used to make up unlimited standard letters. Only attempt this if you are confident with word processing, tables, header and footer, images and positioning.

This bulletin will show you how to set up a simple letterhead. This example uses a footer, but no header is required. More complex designs are possible with care and more complex tables. Trial and error may be required to get it right. Save your work frequently to avoid having to start afresh every time if a snag is encountered.

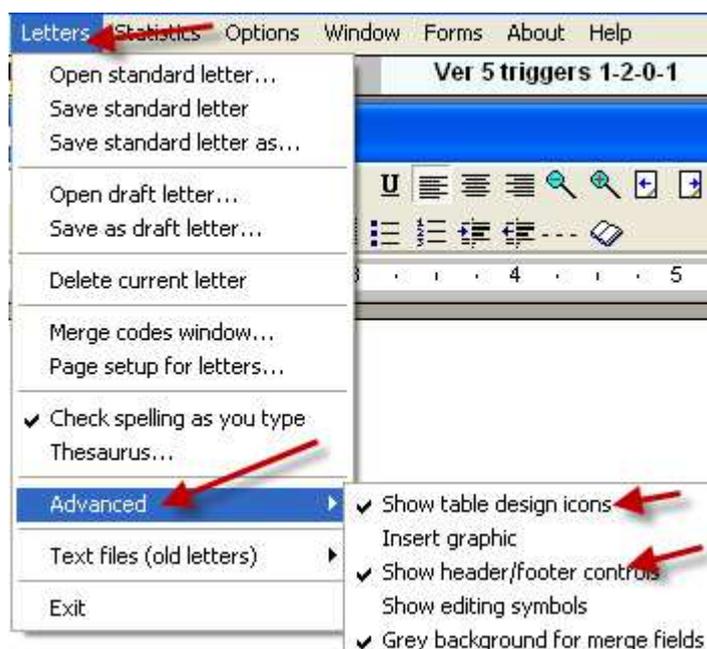
NB. Never try and make a PGdebt standard letter using MS Word. Word puts lots of special codes into the letter which are unseen but will not be understood by PGdebt. Word does not understand PGdebt letter merge codes. Do not use Word to manipulate PGdebt.

The PG word processor is not as clever as Word and it does not have the same facilities. It is optimised for mail merge not graphic design. You may not be able to get an exact reproduction of your letterhead, but it is usually acceptably close.

PG Computing can design these letterheads for you, but there will be a charge for this. Contact us for details of this service.

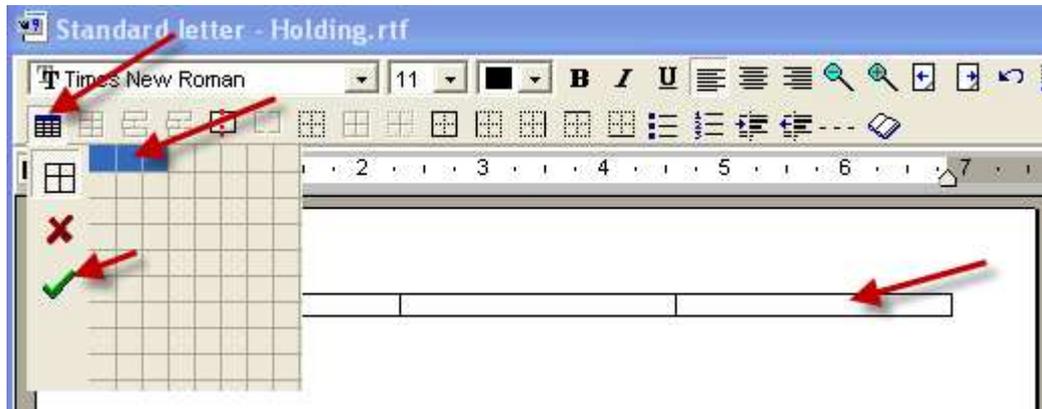
### 1. First turn on the editing facilities

- Go to Options/supervisor/security and put a tick alongside “Allow WP header footer support”
- NB. You will need to do this step on all PCs which will be using letters with header and/or footers
- Then click Letters/advanced and put ticks by “Show table design icons” and “Show header/footer controls”



## 2. Then open a standard letter and add a table at the top

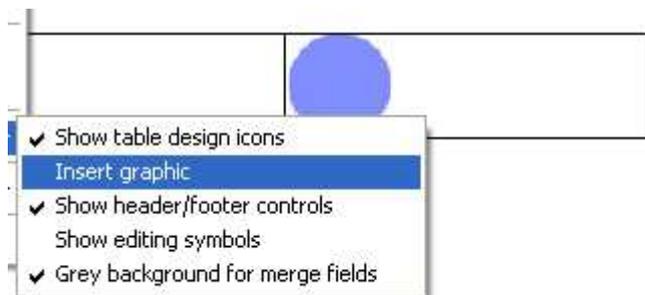
- Open a standard letter
- Place the cursor at the top of the letter
- Use the table design icons to add a table with three columns and one line
- Save the standard letter



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## 3. Then add a graphic to the table

- Place the cursor in the right table cell
- Click Letters/advanced/insert graphic
- Locate and select the graphic you want to use as your logo and insert it (.jpg or .bmp only)
- Resize the graphic as required
- Save the standard letter



- Then drag the table column widths to look something like this
- Save the standard letter



#### 4. Then put in your address

- Place the cursor in the middle table cell
- Type in whatever you choose as your name and address etc
- Adjust the text alignment to centre, or as you wish
- Adjust fonts to correct size and colour
- Delete any white space to bring the address merge codes up the top of the page
- Save the standard letter

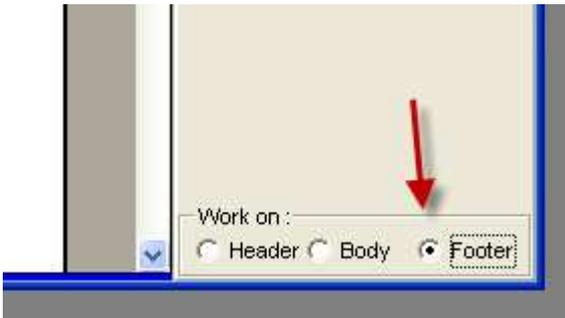
	<b>Anytown Debt Advisory Service</b> 101 High Street, Anytown, AA1 1AA Tel. 01234 56789 Fax. 0123498765 Email <a href="mailto:info@anytowndebt.com">info@anytowndebt.com</a>	
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#[CRED CONTACT]  
#[CRED AGENCY]  
#[CRED ADD1]  
#[CRED ADD2]  
#[CRED ADD3]  
#[CRED ADD4]  
#[CRED ADD5]

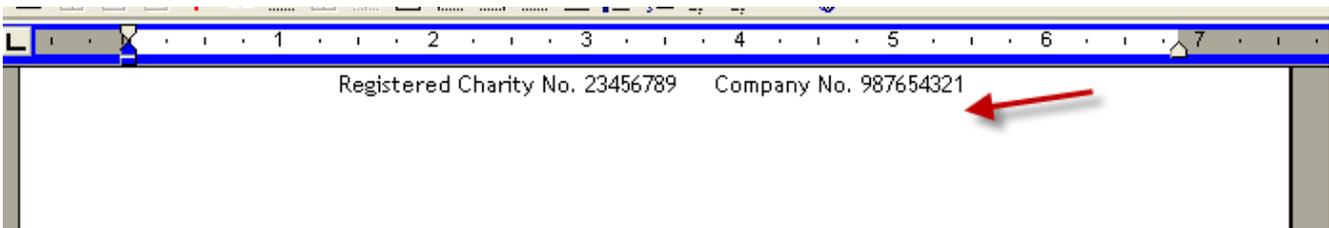
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#### 5. That completes the top of the letterhead, now we will place a line of text at the bottom of the page, this uses the document 'footer'.

- Select to work on the footer first at the bottom right of the WP window



- The whole window now shows the document footer
- Type in any info you want in the footer
- You can use a table here too if you wish
- Keep it all small and make very sure there is no "white space" above or below your text
- The red arrow shows possible white space...delete any carriage returns in this area



- When happy select to work on "Body" text again
  - The whole letter reappears with your footer at the bottom
  - Save the standard letter
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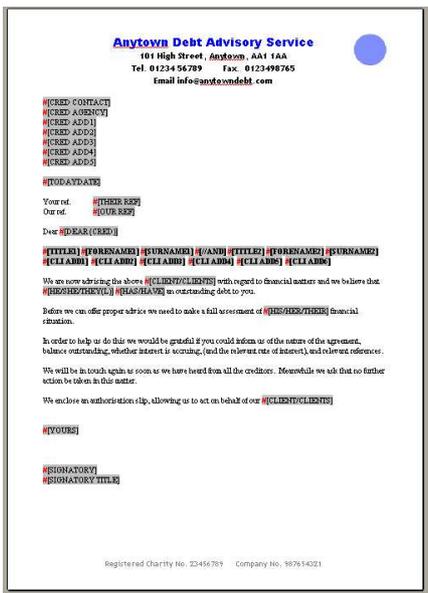
## 6. Now remove the table borders

- Select the whole table at the top of the letter
- Click the “remove borders” table design icon
- Save the standard letter



## 7. Now check the letter is as you wish

- No table borders showing
- Text and merge codes in the right place
- Footer showing, but not forced up the page by white space
- Make any adjustments, then when happy, save the file



You now have a standard letter, just like the one you started with, but with header and footer for your customised letterhead. Save it with a separate name

- To make up your other standard letters with letterhead, use this one as the template
- Open *another* standard letter
- Select all the body text and merge codes in that letter
- Press CTRL-C to make a copy on the clipboard
- Open your *new template standard letter with letterhead*
- Delete all text and merge codes
- Place the cursor in the letter
- Press CTRL-V to paste in the text from the clipboard, fine tune the position of everything
- Save the letter with a separate name
- Now you have two standard letters with letterheads
- Repeat as necessary for your other letters

## 8. Problems and tips

- White space can get in the way and spoil the layout especially with the footer
  - Colours in PGdebt are limited to basic colours for the text
  - Graphics can hugely enlarge the letter file size, keep it simple
  - Try not to take graphics from Word documents...use the original image file
  - If necessary re-scan images to keep them small or use file size reduction software
  - Merge codes do not work in the header or footer, do not place them in these zones...note that the example above does not use a header. A header is rarely necessary and is best avoided so that merge codes can be used if required.
  - Merge codes *can* go in tables, but it gets complicated
  - You may use any font for printed letters, but see below for letters intended for emailing
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## 9. Email issues

PG9 can email letters direct from the program. For this to work well you need to have a letterhead set up as above, or a simple "email letterhead" (simplified with no graphics) otherwise the letter comes out at the other end as though it had been printed on plain paper.

File size is very important. The email system has to convert the letter to a .pdf and then send it as an attachment this all gets very PC intensive if the letter file is massive because of an elaborate letterhead design, you may need a simplified letterhead for email. The standard letter should be below 1MB if possible for best speed.

The .pdf engine in PGdebt does not convert some fonts accurately. They are readable with ease but have minor errors may occur which spoils the appearance. We suggest you avoid Times Roman and Arial fonts in letters intended for emailing. You can test your fonts using the "font test" letter, email this to yourself from PG9. Many fonts convert perfectly and we recommend using Georgia or Book Antiqua for serif fonts and Trebuchet, Univers or Verdana for sans serif fonts. Many more are quite OK, just test them for yourself.

To change the font in a standard letter. Open the letter highlight the text you want to change, change the font and save the letter again.

There is a specific data sheet on using emails on the web site

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