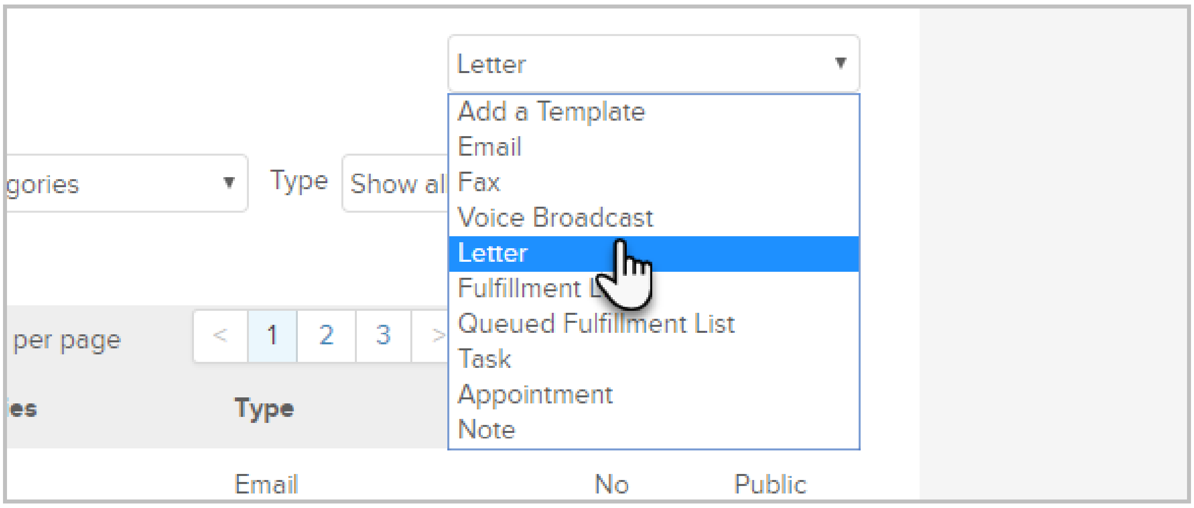
Create A Legacy Letter Template

A legacy letter template can be used to broadcast to a group of contacts, or from a single contact record. Infusionsoft will queue up a letter fulfillment job on the home page dashboard of the user the letter is assign to. When the letter job is processed, the system will auto-merge information from contact records in Microsoft Word® so you can quickly print the letter.

1. Go to **Marketing > Templates**
2. Select **Letter** as the template type.



3. Enter a Title for the letter template. Users will identify this template by the title. It should be short but descriptive.
4. Choose a privacy option.
    - Public: Choose this to make the template accessible to other Infusionsoft users.
    - Private: Choose this if you want to hide this template from other Infusionsoft users.
5. Click on the **Edit** tab to compose the letter. Compose the letter in Infusionsoft or paste content from Microsoft Word.
6. Click on the **Open Merge Window** button to access the merge fields you'll use to personalize the letter. Note: You must use Infusionsoft merge fields, even if you copy/paste from Word.
7. Click on a merge field category to access the merge fields.

8. Enter the processing information.

    - **Needs Labels**: Set to "yes" if you will print mailing labels for this letter.
    - **Assigned User**: Select the user who will be responsible for printing the Letter and Labels. This letter job will show up in the fulfillment jobs widget on their user home page.
    - **Notification**: Mark this check box to send the assigned user an email when the letter job is triggered.
    - **Notify Subject**: Enter the subject line for the notification email (e.g. New Customer Welcome Letter Job)
    - **Notify Body**: Enter more detailed processing instructions (e.g. hand address, print on company letterhead)

9. Click on the **Save** button to create the template.

10. (Optional) Click on the **Categories and Follow-Up Sequences** tab to assign this template to a category. The categories are used to organize and filter templates.

11. (Optional) Click on the **Misc. Expense** tab to assign a cost per person to this template. This cost can include both the materials and labor needed to process this letter for each person.

12. Mark the template as **Ready** and click on the **Save** button.
