SPREADSHEET SOLUTIONS

Creating business solutions through custom spreadsheets

CASE STUDY - LETTER CREATOR FOR SPINAL ELEMENTS CHIROPRACTIC

Yes, you read correctly, a letter creator. Have you ever had the need to create many of the same letter, all personalised with an individual's details? This is exactly what Spinal Elements Chiropractic was faced with, and this is the case study on the solutions which we provided for them. We have done other similar projects, where we have linked a generated letter to a job card, but this time it was a database of client details which fed the letter generator. This type of product can not be sold as a standard product, as there is customisation required with the database and letter layout, but please let this case study inspire you!

Firstly we have the database, where the client details can be entered. Not only does it automatically change the recognised data to the right format, but it also shows them what data is missing. Red is vital data used in the letter, amber is data that could be used, but currently is not, and green is data that may not be required (like line 2 - 4 of the address). It will also show them if the database passes, if all of the data required for the letter is available. They can select any contact and change it to 'ignore' and then the whole line will grey out, and that client's details will not be used, and they will not be available for the letter selection.

Database for Spinal Elements Chiropractic

In order to avoid mistakes on the letter, please ensure that all entries below are complete, in the right format (dates etc), have the correct case (upper and lower) and are spelt correctly. Any errors or omissions here will carry over to the letter. Select 'Ignore' if you don't wish to make a specific client available for selection on the letter.

Potential Missing Data

Essential Data (required for letter):	0
Non-Essential Data (not on letter):	0
Unlikely Data (2nd to 4th address line):	8

Letter Pass

✓

Code	Ignore	Title	First Name	Surname	Company	Patient ID	Contact No.	Email Address	Date of Birth	Address Line 1	Address Line 2	Address Line 3
RSS001		Mr	Richard	Sumner	Spreadsheet Solutions	001	0750 427 0579	richard@spreadsheetsolutions.pw	20/07/1977	1 Business Park	5 Business Street	
MSM001		Mr	Mark	Smith	Mark's Company	002	0751 234 5678	mark@markscompany.co.uk	19/03/1980	1 Business Place	3 Business Road	
CJC001		Mrs	Candy	Jones	Candy's Candy	003	0759 876 5432	candy@candyscandy.co.uk	12/02/1982	1 Sweet Park	2 Sweet Road	
JAJ001		Miss	Jane	Anderson	Jane's Jeans	004	0753 456 9876	jane@janesjeans.co.uk	01/08/1978	1 Blue Business Park	7 Blue Road	

They then get to draft the letter and the letter header, as you can see below, the codes for each of the database headers appear on the right of the screen. This means that all they have to do, is replace and 'dynamic' word with the respective code. Whenever a code appears, the letter will replace it with the relevant word from the database, depending on the contact selected. They can also choose the formatting of the letter header, normal, bold, underlined, or bold and underlined. They can sign off the letter as they wish.

HEADING	
Notification of a New Automated Letter Creator for You, []02 []03!	

Heading Formatting
Bold & Underlined

LETTER INTRO (to) BODY AND SIGNATURE (from)

Dear []01 []02 []03,

This letter serves to show you, []02, that it can generate a letter per client, at the click of a button. All you have to do is make sure that your database is up to date (by following the colour coded prompts), and then type a letter, using the codes to substitute words that you wish to personalise on each letter.

We see that your business, []04, is currently '[]16' on our database and your patient ID is []05. Please note that should we wish to contact you, we will call you on []06 or email you at []07. Please note that we will notify your GP, []15, of any emergencies.

Thank you very much for reading this letter.

Spreadsheet Solutions (Written as an example).

All names and details are fictitious.

Codes		
Codes	Type	Example
[]01	Title	Mr
[]02	First Name	Richard
[]03	Surname	Sumner
[]04	Company	Spreadsheet Solutions
[]05	Patient ID	001
[]06	Contact No.	0750 427 0579
[]07	Email Address	richard@spreadsheetsolutions.co.uk
[]08	Date of Birth	20 July 1977
[]09	Address Line 1	1 Business Park
[]10	Address Line 2	5 Business Street
[]11	Address Line 3	
[]12	Address Line 4	
[]13	Town / City	Beckenham
[]14	Postcode	BR3 1AA
[]15	GP Surgery	Beckenham GP
[]16	Status	Active

We have then created them a custom letter-head, including their logo, contact details and address, which is made up in the example (address). This will not change from letter to letter, however they are able to change their contact details on another tab.

Company Name:	Spinal Elements Chiropractic	35 Medical Street
Phone Number:	0208 289 6956	Bromley
Website:	www.spinalelements.co.uk	United Kingdom
Email Address:	sarahdyal@spinalelements.co.uk	BR1 1AA
Reg. No.:	04151	

Spinal Elements Chiropractic

30 June 2016

All that is left for them to do now, is select each client in turn, and save the document as a PDF. That creates a separate PDF sheet for each client letter, which is individually tailored to that specific client.

Here is the first client's details selected, based on the layout of the letter done earlier. As you can see, all of their details have populated the letter template. *Please note that Spreadsheet Solutions typed this letter as an example* .

Mr Mark Smith
1 Business Place
3 Business Road
London
W1 1AA

Patient Name: Mark Smith
Patient ID: 002

Notification of a New Automated Letter Creator for You, Mark Smith!

Dear Mr Mark Smith,

This letter serves to show you, Mark, that it can generate a letter per client, at the click of a button. All you have to do is make sure that your database is up to date (by following the colour coded prompts), and then type a letter, using the codes to substitute words that you wish to personalise on each letter.

We see that your business, Mark's Company, is currently 'Active' on our database and your patient ID is 002. Please note that should we wish to contact you, we will call you on 0751 234 5678 or email you at mark@markscompany.co.uk. Please note that we will notify your GP, London GP, of any emergencies.
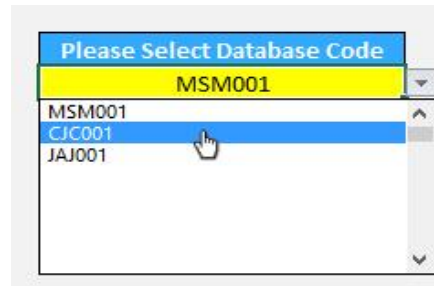
Thank you very much for reading this letter.

Spreadsheet Solutions (Written as an example).

All names and details are fictitious.

Then by simply selecting the next client from the drop down list on the letter sheet, they can select the next client, and have all of their details populate the letter. Any clients marked as 'ignore' on the database, will not appear on this list. It will also show if any vital details are missing from the database.

Mrs Candy Jones
1 Sweet Park
2 Sweet Road
Bromley
BR1 1AA

Patient Name: Candy Jones
Patient ID: 003

Notification of a New Automated Letter Creator for You, Candy Jones!

Dear Mrs Candy Jones,

This letter serves to show you, Candy, that it can generate a letter per client, at the click of a button. All you have to do is make sure that your database is up to date (by following the colour coded prompts), and then type a letter, using the codes to substitute words that you wish to personalise on each letter.

We see that your business, Candy's Candy, is currently 'Active' on our database and your patient ID is 003. Please note that should we wish to contact you, we will call you on 0759 876 5432 or email you at candy@candyscandy.co.uk. Please note that we will notify your GP, Bromley GP, of any emergencies.

Thank you very much for reading this letter.

Spreadsheet Solutions (Written as an example).

All names and details are fictitious.

We would like you to hear what the client thinks of their custom made solution, so here is what Sarah had to say. Sarah is the owner of Spinal Elements Chiropractic.

My experience of working with Spreadsheet Solutions has been excellent.

I needed to send letters to all my patients informing them of a change in clinic address and opening hours. Spreadsheet Solutions understood my company needs and provided me with an easy to use programme in which I could create my letter and select simply select the patient's information to be added in the correct places without me having to type each one out.

Any information regarding Spinal Elements Chiropractic that was already in the programme could easily be changed by myself if need be.

A problem that I encountered was that due to patient confidentiality I was unable to give Spreadsheet Solutions my existing patient database to input into the programme. They professionally dealt with this creating me an empty database into which I could transfer my own data. Richard talked me through doing this over the phone along with how to use the programme.

I found the programme user friendly and logical to use. In all this "letter creating programme" has saved me precious time and I have no doubt that I shall be making good use of it again and again.

I would like to say a huge thank you to Spreadsheet Solutions for their great product and service.

So there you have it. We have done projects similar to this before, where we link letters, terms and conditions or other documents to a job card, but this is the first stand-alone letter generator which we have done. This one is also unique as it allows you to type the letter that you want, and it substitutes the 'dynamic' words, based on the database. Judging by what Sarah had to say about it, you may want to get one of your very own!

We hope that this case study has inspired you to get us to create your project management software. This was all created using Excel, and is a macro-free spreadsheet, imagine what we can do for you. Please use the links below to visit our website and contact us. We have videos, free downloads, brochures, and a wealth of information about what we do on our website. You can also sign up to receive our monthly newsletter. **If you think that your business would benefit from a spreadsheet like the one shown here, please contact us using the links below.**

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