



How to Send Prospect Letters

Description

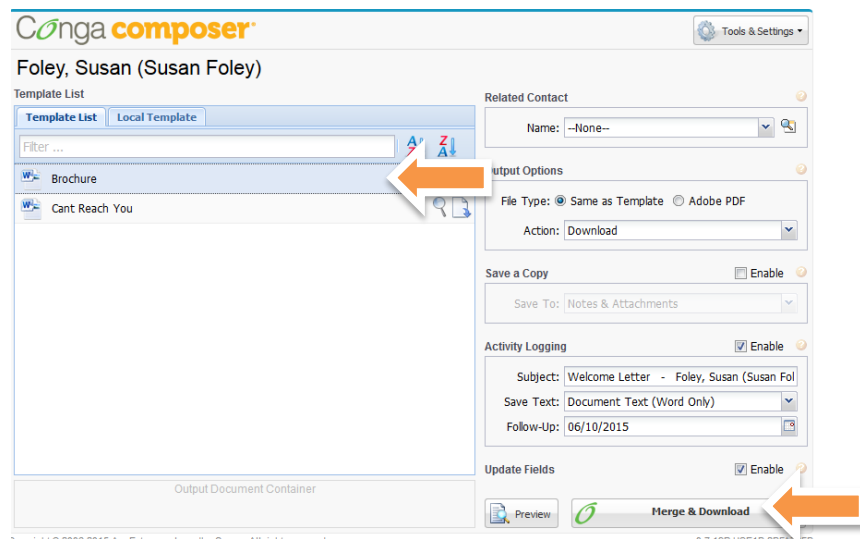
Use the Prospect Letters function to send a letter template to a Prospect directly from the Prospect profile screen.

The system will:

-  Send a Prospect Letter from a list of existing templates
-  Record a completed task on the Prospect's file under Activity History

Step by Step

- 1 Navigate to the Prospect's profile
- 2 Click **Prospect Letters**
- 3 A Conga Composer window will pop up. Select the letter template that you wish to send.
- 4 Click **Merge & Download**



- 5 The resulting Word document will merge your Prospect's information with the selected template and a task will be recorded in the Prospect's file.