

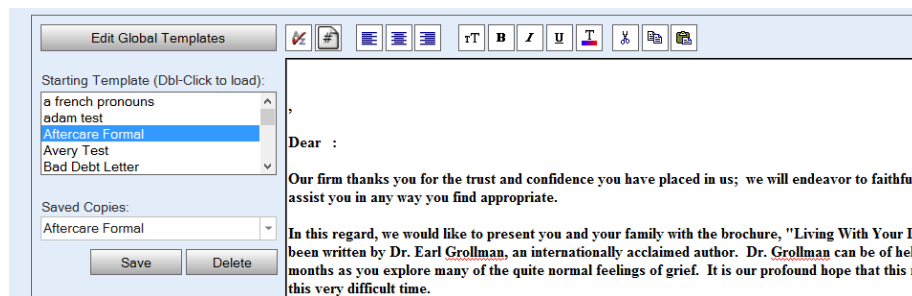
# Letters/Mail Merge

The Letters template will also be used to set up the letters you' want to use for mail merges. Below are the instructions to send a mail merge, including carving out the group of people you'd like to send the letter to. For sending a letter to an individual person, skip the Searching function!

So, we created this letter function that acts just like Microsoft Word, but it's built into your software! You will want to keep all your standard letters in the template section so you are not recreating the same document over and over. The other cool part, is that it saves a copy of what you've mailed in this person's record.

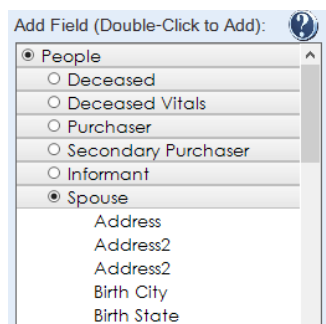
Here's how it works:

First, start with an existing letter that we've thrown in. Trust me, these letters aren't brilliantly written. We primarily put them in as place holders for you to change. Select the template and the data for this case will merge automatically. You can see that you are able to type directly in the letter on the fly. Once you start typing, the Save button turns red. Click it when you are done and ready to print so you have a record of what was sent.



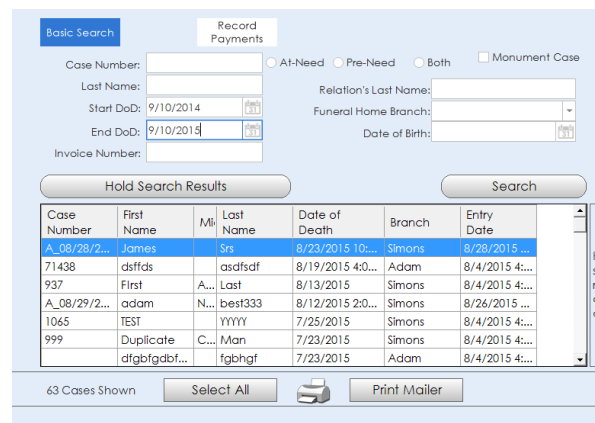
Along the top of the document, you'll see these icons to make text & format changes to the letter. For example, bold, underlining, and centering.

Now, let's look at editing the templates and creating new ones by clicking Edit Global Templates. Start with an existing one. Make your changes by typing in the top window. The bottom simply shows you a preview of how it merges.



By selecting data fields, you can create a merge field for just about any text in the software. Be sure to save when you are done. We recommend cutting and pasting from existing templates when you want to create a new one. This will save you time from setting up a letter from scratch.

Now that you have a handle on how to create a letter, let's learn how to do a mail merge. First, carve out the group of people you want to receive the letter by clicking the binoculars. Typically our clients want to do a mail merge based on a date range. So, to do a 1 year Anniversary letter, pick the start and end date, then Search. Click Select All to grab the entire list then hit Print Mailer. It holds all those names in memory and you are ready to select the letter for the merge.



Find the Anniversary template, then make any edits to the letter on the fly. Keep in mind, you can change the paper dropdown to select your paper size or even changing it to envelopes or Avery labels. Hit the printer icon and say yes to confirm printing as a mail merge. All of those cases you had in memory just merged. Many of our templates were created for the Purchaser to be the recipient. So, if you notice any missing names, it's because there was no purchaser selected on that case. Use the printer icon to send it to your printer. The @ symbol will email the letter if you're using Outlook. Again, be sure that there is an email address entered for each purchaser for the mailer to send.

Next, you'll need envelopes for these letters. Select Envelope from your template dropdown, and use the Paper/Print to select which size envelope. Again, click the printer icon and click print at the top of your preview.