

Cheat Sheet

Merging a Form Letter With a Mail List

The following describes and illustrates the process of merging a mail list with a letter then either printing the result or sending it via email to the intended recipients.


Merging and Printing is a four step process:

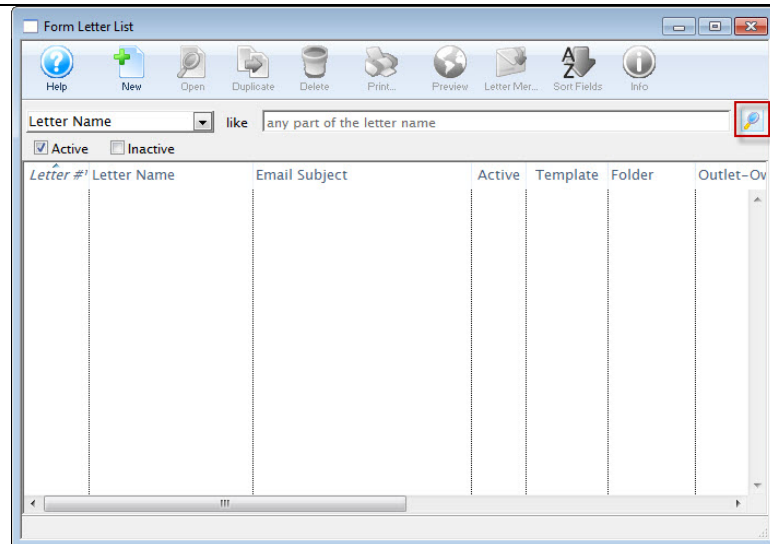
1. Selecting the Letter
2. Attaching the Letter to a Mail List
3. Setting Sending and Routing Options
4. Complete the Merge and Print or Send

Selecting the Letter

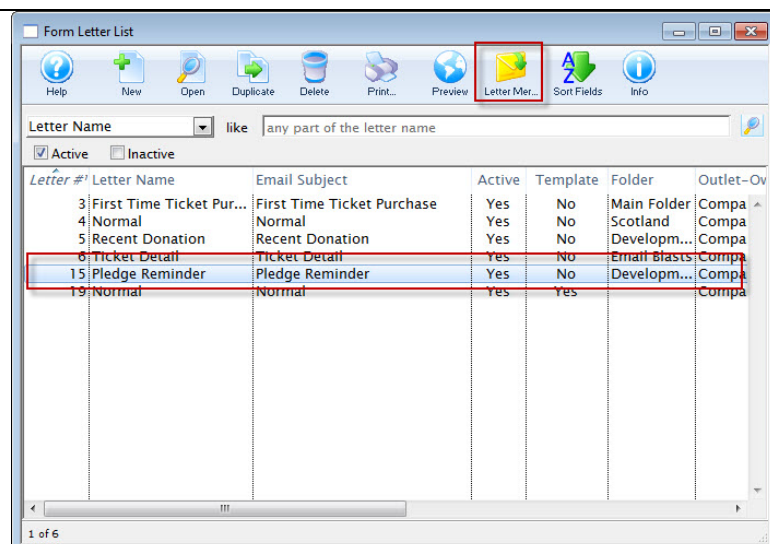
To start merging a letter with a mail list, you first need to choose the letter. To do this, you perform the following steps:

1. Open the Form Letter List Window by going to the Form Letters Menu in the Theatre Manager toolbar and selecting Form Letters.

1. You can also open the Form Letter List Window by clicking the Letters  button in the toolbar.
2. The Form Letter List window opens.



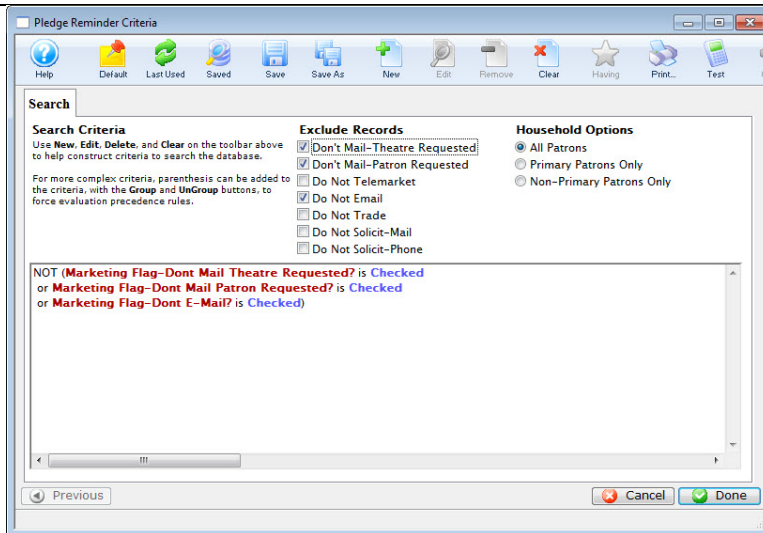
3. Click the Search  button.



and select the letter you'd like to use in your mail list merge.

4. Click the Letter Merge  button.

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The Form Letter Criteria window opens.

- When the criteria window opens, you can continue selecting or changing the criteria.

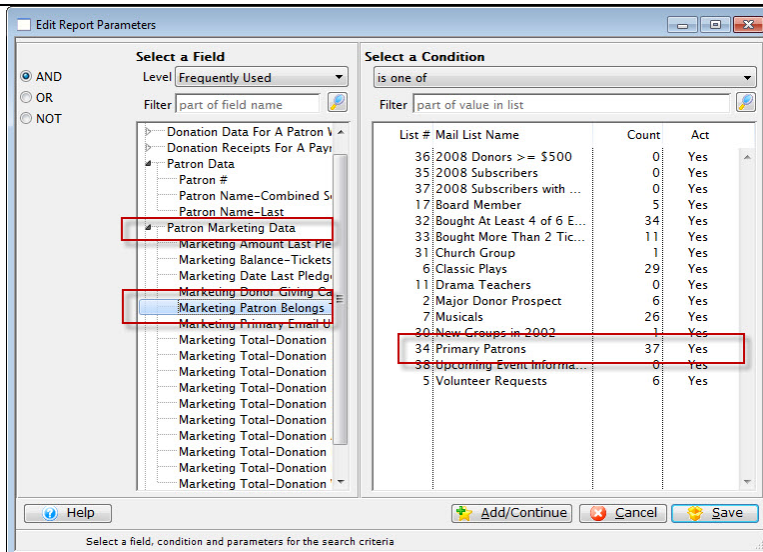
Attaching the Letter to a Mail List

Exclude Records

- ☒ Don't Mail-Venue Requested
- ☒ Don't Mail-Patron Requested
- ☐ Do Not Telemarket
- ☒ Do Not Email
- ☐ Do Not Trade
- ☐ Do Not Solicit-Mail
- ☐ Do Not Solicit-Phone

NOT Marketing Flag-Dont Mail Venue Requested? is Checked
 or Marketing Flag-Dont Mail Patron Requested? is Checked
 or Marketing Flag-Dont E-Mail? is Checked

- You can exclude those patrons who have indicated they do not wish to receive mailings, by ensuring the appropriate Exclude Records radio buttons are selected and that the criteria reflects that information.



- To add any new piece of criteria, including a specific

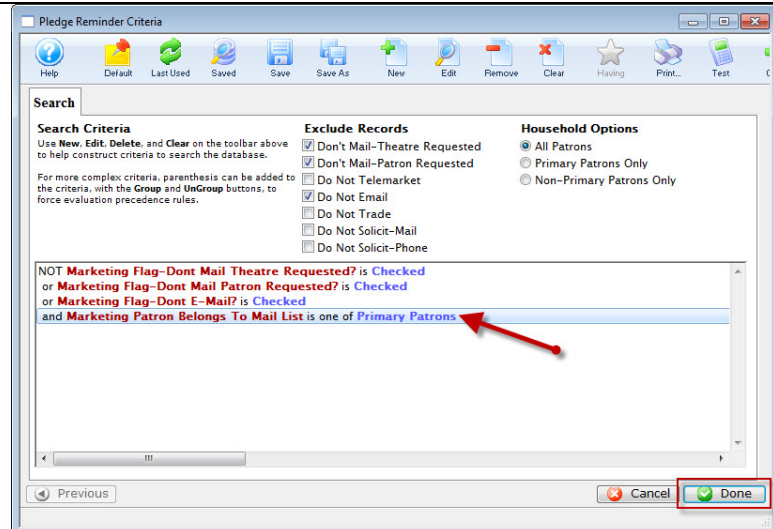


Mail List, click the New button.

To initiate a merge based on an existing mail list, select the Criteria **category Patron Marketing Data > Marketing Patron Belongs to Mail List.**

- On the right side, choose the mail list of patrons to whom you'd like to send your letter.
- When you have made your selection from the list of Mail lists, close the criteria window.

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Pledge Reminder Criteria

Search Criteria
Use New, Edit, Delete, and Clear on the toolbar above to help construct criteria to search the database.
For more complex criteria, parenthesis can be added to the criteria, with the Group and UnGroup buttons, to force evaluation precedence rules.

Exclude Records

- ☒ Don't Mail-Theatre Requested
- ☒ Don't Mail-Patron Requested
- ☐ Do Not Telemarket
- ☐ Do Not Email
- ☐ Do Not Trade
- ☐ Do Not Solicit-Mail
- ☐ Do Not Solicit-Phone

Household Options

- ☒ All Patrons
- ☐ Primary Patrons Only
- ☐ Non-Primary Patrons Only

NOT Marketing Flag-Dont Mail Theatre Requested? is Checked
or Marketing Flag-Dont Mail Patron Requested? is Checked
or Marketing Flag-Dont E-Mail? is Checked
and Marketing Patron Belongs To Mail List is one of Primary Patrons

Previous Cancel Done

The selected mail list is added to the criteria.

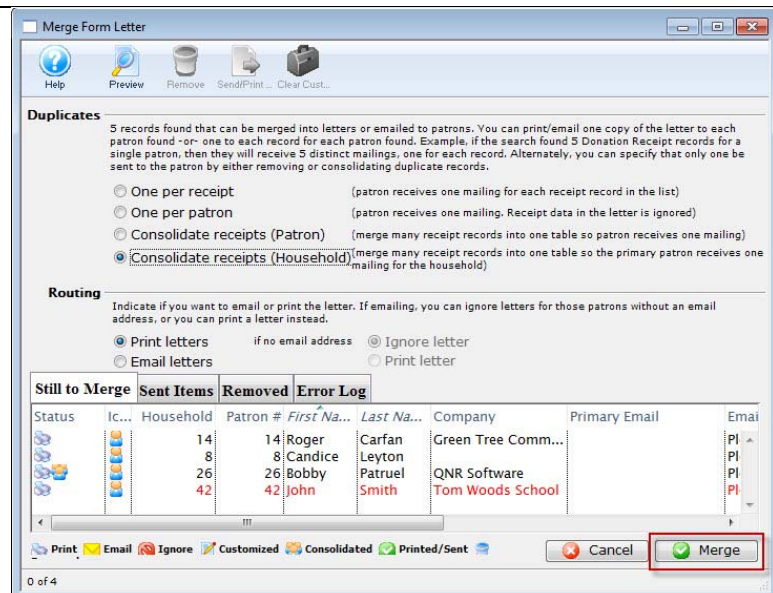
If you do not have an existing mail list, you could enter criteria to build a new mail list to use for this mailing.

The process is the same whether you're using an existing one or creating a new one.

10. Click **Done** in the bottom right to start the merge.

11. The Merge Form Letter Window opens.

Setting Sending and Routing Options



Merge Form Letter

Duplicates
5 records found that can be merged into letters or emailed to patrons. You can print/email one copy of the letter to each patron found - or - one to each record for each patron found. Example, if the search found 5 Donation Receipt records for a single patron, then they will receive 5 distinct mailings, one for each record. Alternately, you can specify that only one be sent to the patron by either removing or consolidating duplicate records.

- ☐ One per receipt (patron receives one mailing for each receipt record in the list)
- ☐ One per patron (patron receives one mailing, Receipt data in the letter is ignored)
- ☐ Consolidate receipts (Patron) (merge many receipt records into one table so patron receives one mailing)
- ☒ Consolidate receipts (Household) (merge many receipt records into one table so the primary patron receives one mailing for the household)

Routing
Indicate if you want to email or print the letter. If emailing, you can ignore letters for those patrons without an email address, or you can print a letter instead.

- ☒ Print letters (if no email address) ☐ Ignore letter
- ☐ Email letters ☐ Print letter

Still to Merge	Sent Items	Removed	Error Log
Status	Household	Patron #	First Na... Last Na... Company Primary Email Email
	14	14	Roger Carfan Green Tree Comm...
	8	8	Candice Leyton
	26	26	Bobby Patruel QNR Software
	42	42	John Smith Tom Woods School

Print Email Ignore Customized Consolidated Printed/Sent Cancel Merge

12. Make the following selections appropriate to your needs.

Duplicates

Set the radio buttons to reflect the type of letter output you'd like for your mailing. Choices are:

One per receipt-there will be one letter for each receipt in the record

One per patron - Patron receives just one mailing and the Receipt data in the letter is ignored. While this will limit the number of letters to a single patron, several patrons in the same household could receive letters

Consolidate tickets (Patron)- the receipt data is consolidated into a table (rather than being ignored) and each patron will receive one letter based on that table of receipts. Several patrons in the same household could receive letters.

Consolidate tickets (Household) - Generates one single letter for the primary household patron. This is the method to ensure one letter or mailing for each household

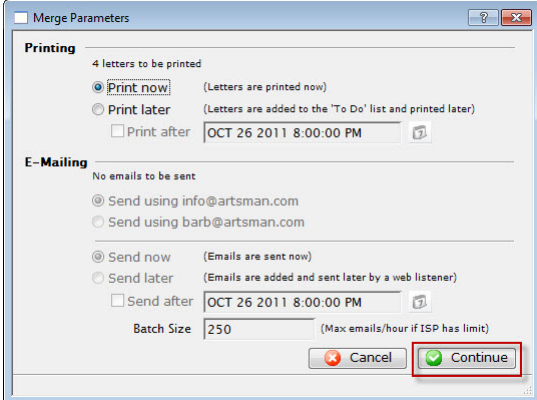
Routing

Set the routing for your letter to - **Print or Email**. If you choose Email, you can then choose "If no email address", then either Ignore or Print the letter.

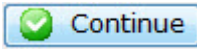
13. Click the **Merge** button when you see the list has been narrowed down.

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Complete the Merge and Print or Send



The Merge Parameters window opens.

14. Set your desired Print and/or Email options and click the Continue  button.

When the Merge is completed, you are returned to the Merge Letter window with a report of the merge is displayed.