Merging a Form Letter With a Mail List

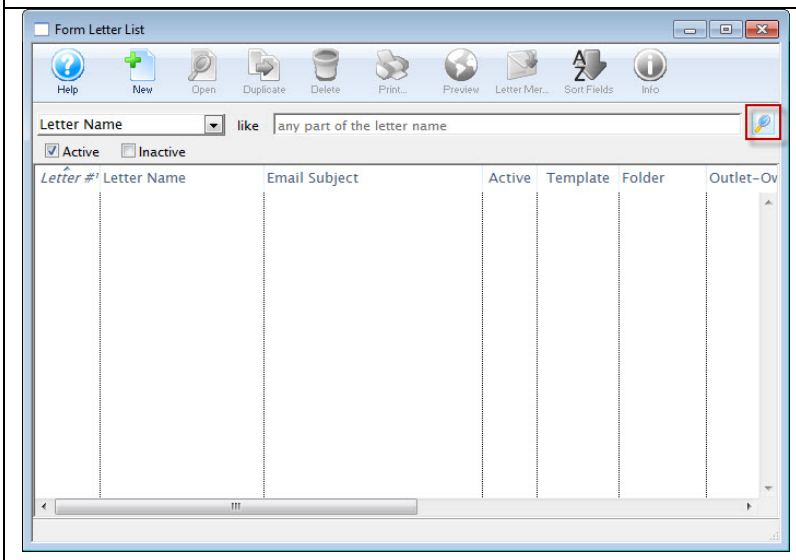
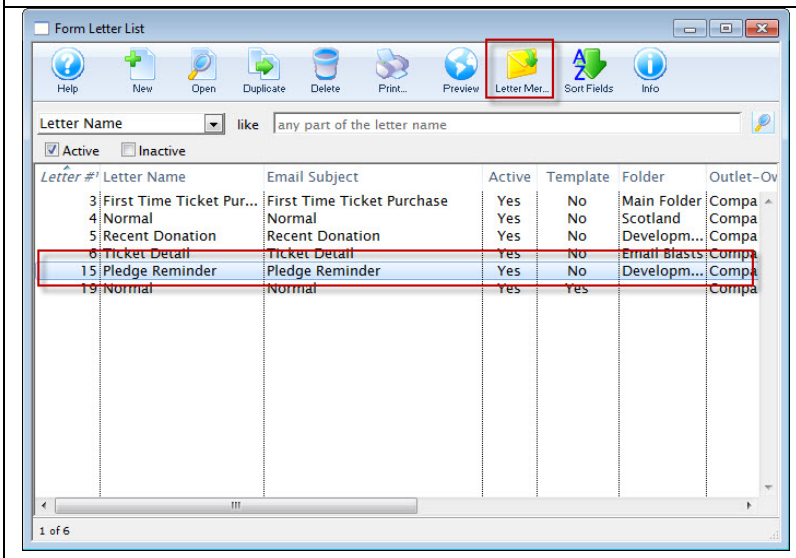
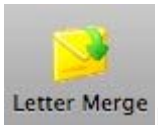
The following describes and illustrates the process of merging a mail list with a letter then either printing the result or sending it via email to the intended recipients.

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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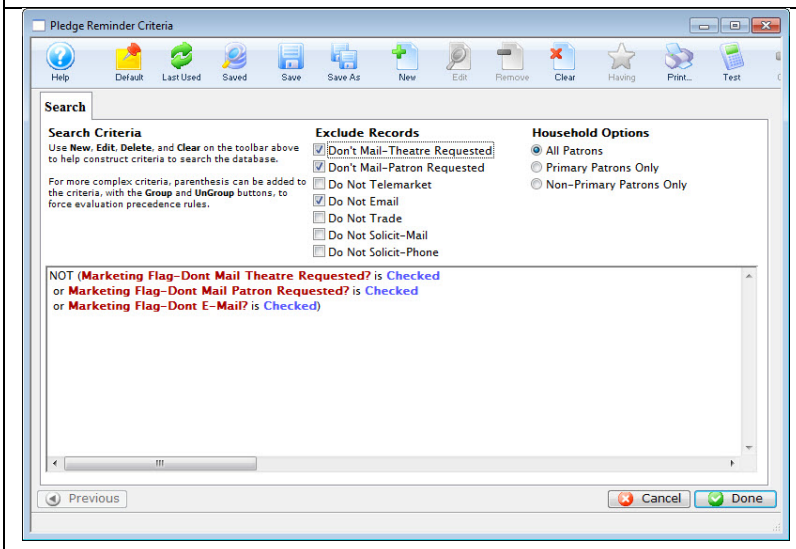
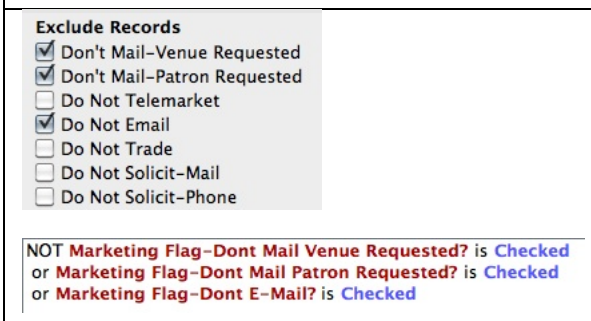


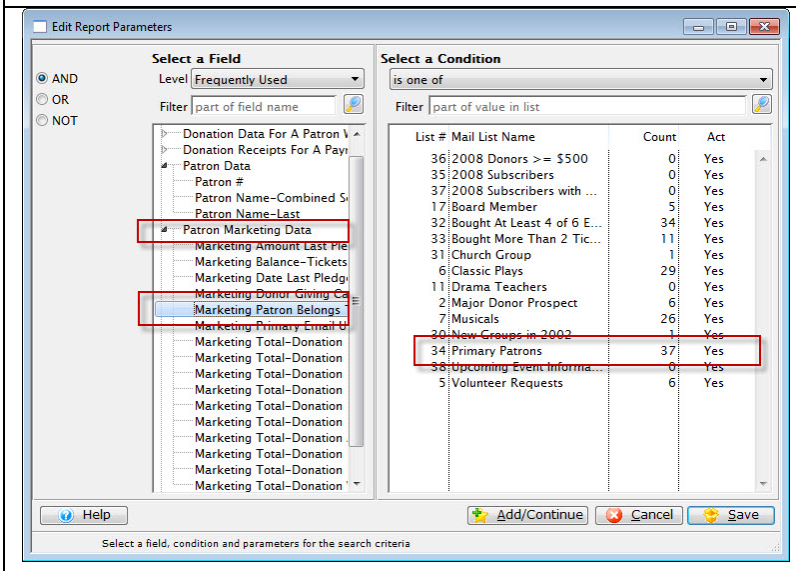
The Form Letter Criteria window opens.

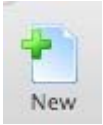
5. When the criteria window opens, you can continue selecting or changing the criteria.

Attaching the Letter to a Mail List



6. 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.



7. 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.**
8. On the right side, choose the mail list of patrons to whom you'd like to send your letter.
9. When you have made your selection from the list of Mail lists, close the criteria window.

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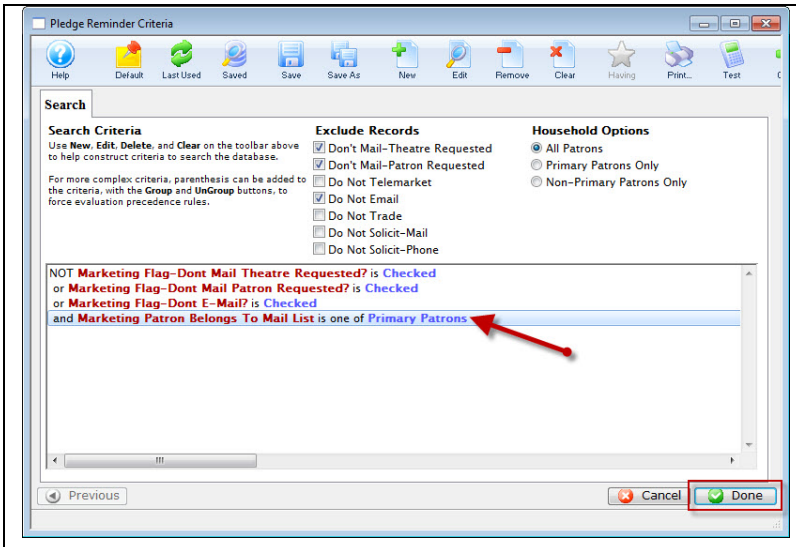
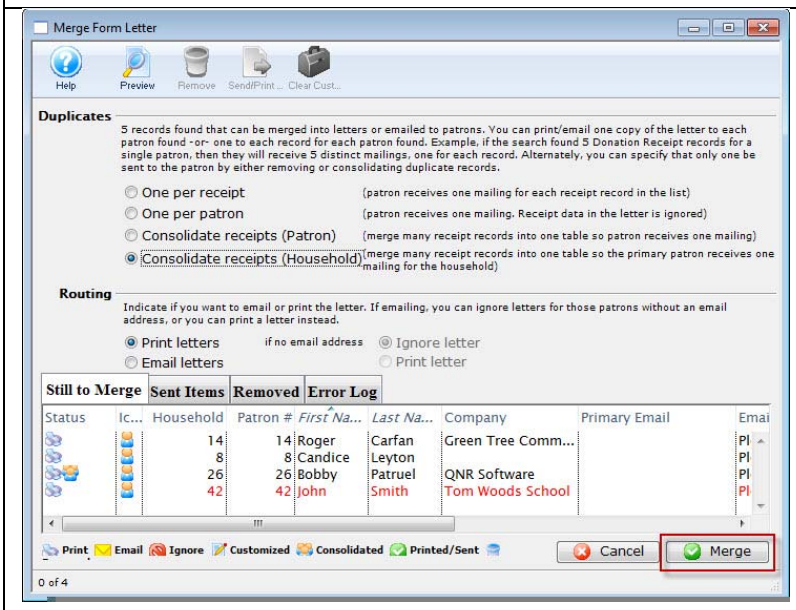


The selected mail list is added to the criteria.
If you do not have an existing mail list, you could enter criteria to build a new mail list to use for this mailing.
The process is the same whether you're using an existing one or creating a new one.

10. Click **Done** in the bottom right to start the merge.
11. The Merge Form Letter Window opens.

Setting Sending and Routing Options



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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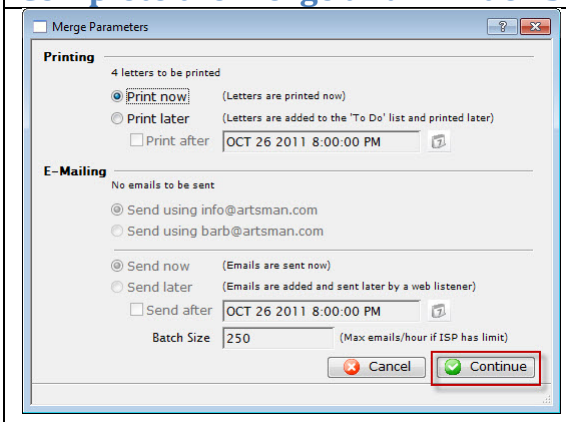
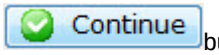
Complete the Merge and Print or Send



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.

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