

LETTERS, LABELS & EMAIL

Now that we have explored the Contacts and Contact Lists sections of the program, you have seen how to enter your contacts and group contacts on lists. You are ready to generate mail merge letters, print labels and envelopes, and send mass emails to your contacts. PastPerfect 5.0 incorporates Microsoft Word to provide you with an easy to use and familiar word processing program to compose your letters. In MS-Word, you can automatically merge information contained in PastPerfect's data fields into your mailings. You must have MS-Word installed on your computer to use these word processing functions. If you do not have MS-Word, you may purchase it from Microsoft or from a retailer.

This chapter will discuss how to create and print mail merge letters. Mail merge letters may be created for Temporary Custody Receipts and Accessions as well as Contacts. We will also review printing mailing labels and envelopes and modifying them to suit your needs. Finally, sending mass emails from PastPerfect will be explored.

COMPOSING DEFAULT LETTERS

Before composing any type of mail merge letter, you should set up a default letter, or make sure one has already been set up. The default letter acts as a template for all new letters, saving you time from having to insert the same information and fields on each new letter. The default letter will contain things like your institution's logo, footer information, signature lines, and mail merge fields for the

recipient's name and address. These are items you want to have appear on every new letter.

To set up your default letters, click the **Setup** button on the Main Menu. For Contact letters, click the **Contacts** button. For Temporary Custody and Accession letters, click the **Collections** button.

CONTACTS DEFAULT LETTERS

When you click **Contacts** on the Setup menu, you will see the screen shown in Figure 22-1.

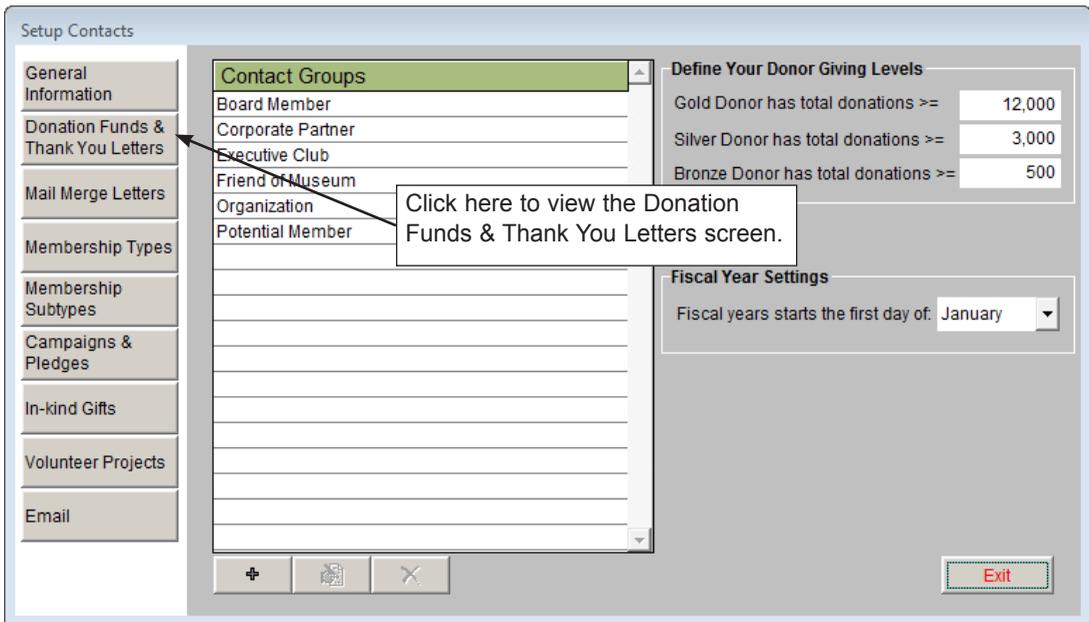


Figure 22-1 Setup Contacts screen

To create a default Donation Fund Thank You Letter, click the button **Donation Funds & Thank You Letters** on the Sidebar. You will see the screen in Figure 22-2. These letters are sent out after posting a donation payment.

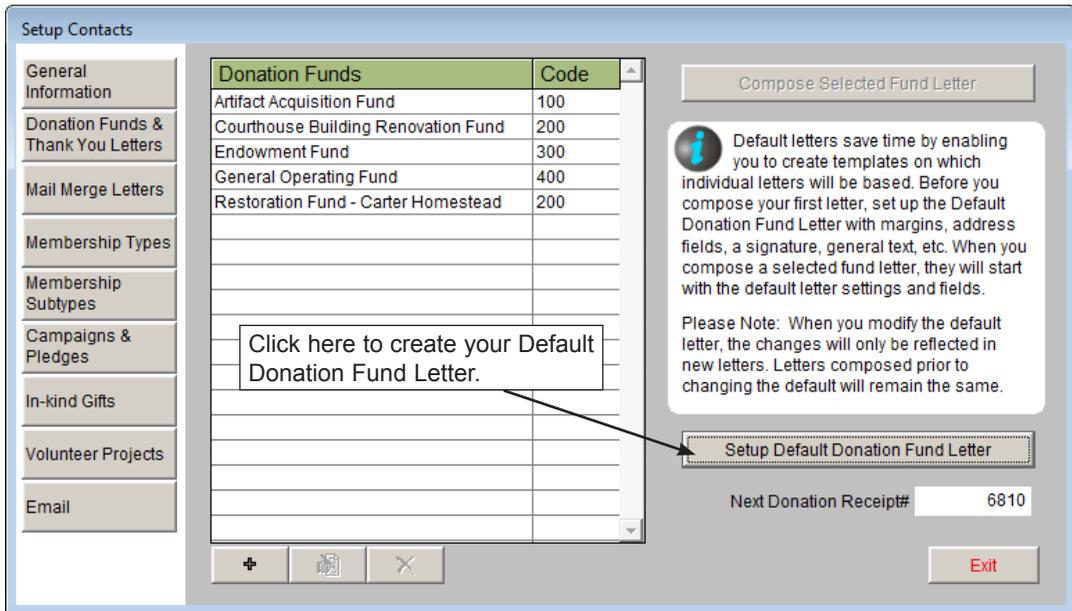


Figure 22-2 Donation Funds & Thank You Letters screen

To create a default Mail Merge Letter, which includes membership letters and letters other than donation or pledge letters, click **Mail Merge Letters** on the Sidebar.

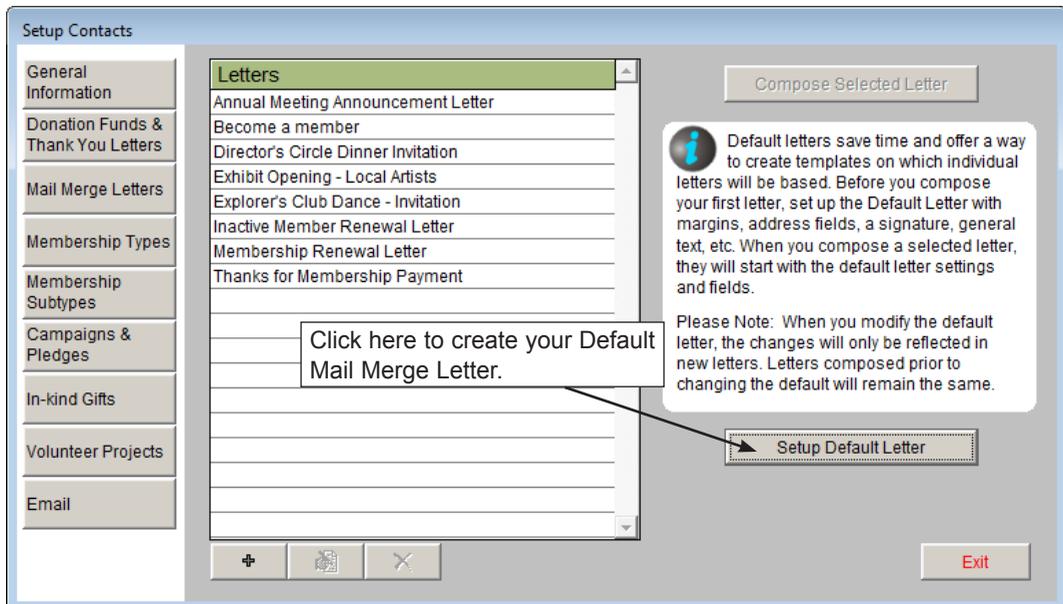


Figure 22-3 Mail Merge Letters screen

On any of the above screens, click the button for Setup Default Letter to open MS-Word. The letter that you set up here, with an example shown in Figure 22-6, will be the template for all new letters added after you set up or change this letter. Changes will not be applied to existing letters.

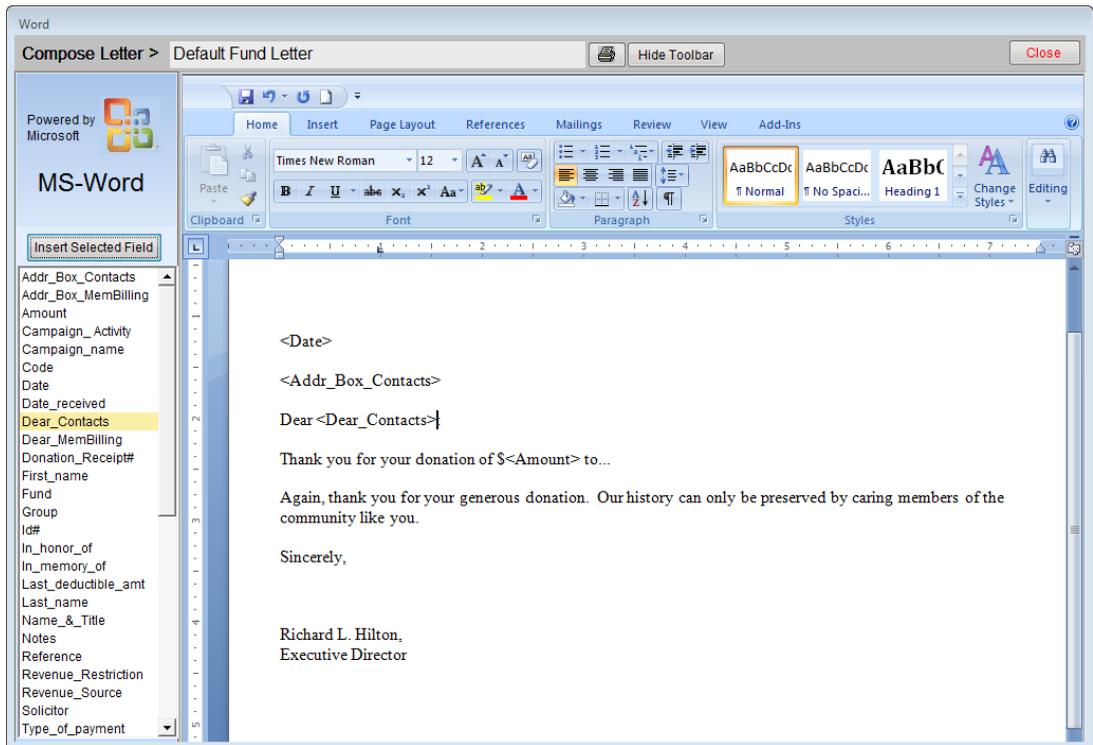


Figure 22-6 Compose Letter - Default Fund Letter

The MS-Word screen that appears is similar to the MS-Word program that you would use outside of PastPerfect, with all the same functions. It also has a few additional functions. The top of the screen will tell you which letter you are viewing and composing. Next to the letter name is a **printer** icon, which will print the letter as it is, without specific data in the mail merge fields. To the right of the printer icon is a button for **Hide Toolbar**, which will remove the MS-Word toolbar from the screen, so you just see the text of your letter. To bring the toolbar back, click the **View Toolbar** button where the **Hide Toolbar** button had been.

Inserting Fields

On the left side of the screen is a list of the fields that you can insert into the letter. These are the fields that will merge data from the records into the letter. To insert a field, place your cursor in the letter where you want the new field. Next, single click on the field name, then click the **Insert Selected Field** button. The field will appear on your letter in angle brackets < >. Do not remove these brackets, or change the text inside them. If you do, data will not be merged into that field.

Using MS-Word Tools

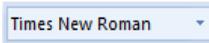
Since PastPerfect uses Microsoft Word, you have access to all of the tools that MS-Word offers in your letters. The guide below explains some common tools in Word 2007. Earlier versions of Word may have tools that appear or function differently. For more detailed information about using MS-Word, please refer to the Help function within MS-Word.



Copy - Highlight text, then click this button to copy it to the virtual clipboard. You may copy text from your letter and paste it into another program.



Paste - Click where you want to insert text or graphics, then click this button. The last text or graphic that was copied to the virtual clipboard will appear here. You may paste text or graphics from another document or program into your letter.



Change Font - Highlight the text you want to change, then use the drop-down menu to see the list of available fonts. Click on a font to change the highlighted text.



Change Font Size - Highlight the text you want to change, then use the drop-down menu to see the list of available font sizes. Click on a size to change the highlighted text.



Change Font Color - Highlight the text you want to change, then click this button to see the available colors. Click on a color to change the highlighted text.



Bold, Italics, Underline - Highlight the text you want to modify, then click the **B** button to make it bold, click the *I* button to italicize it, or click the U button to underline it. All three attributes may be applied to the same text.



Text Alignment - Place your cursor at the beginning of a line, or highlight text. Click the Left Align, Center, Right Align, or Justify buttons to change text alignment.



Insert Bulleted List - Click where you want to begin the bulleted list, then click this button to insert a bullet. To continue with the list on the next line, press **Enter** on the keyboard. To change the bullet types, click the drop-down arrow next to the bullet list icon.



Insert Numbered List - Click where you want to begin the numbered list, then click this button to insert the first number. To continue with the list on the next line, press **Enter** on the keyboard. To change the numbering types, click the drop-down arrow next to the numbered list icon.



Change Margins - Click this button to see options for changing the page margins from the Page Layout tab.



Change Paper Size - Click this button to choose a different size paper for your letter. This option is also in Page Layout.



Insert Header - Click Insert, then the Header button to choose a header style. The header will be placed on your page and you will be prompted to enter text for the header. You may insert images into the header as well. The header will appear on each page of your letter.



Insert Footer - Click this button to choose a footer style to insert. The footer will be placed on your page and you will be prompted to enter text. You may insert images as well. For multiple page letters, the footer will appear on each page of your letter.



Insert Picture - To insert a logo or signature on your letter, click this button. Navigate to the location where the image is stored, then use the Link to File option to insert your image. The image will be placed on the letter.

 **Spell Check** - Choose the Review tab to use MS-Word's spelling and grammar check function.

 **Undo** - To undo the last action performed, click this button. You may click it repeatedly to undo multiple actions. This arrow button appears above the Home tab.

Example Default Donation Fund Thank You Letter

Next, let's look at an example of a default letter. Let's say you want to create a default Donation Fund Thank You Letter. This will be the basis for all of the Donation Fund Thank You Letters for all the Donation Funds that you add later.

From the Main Menu, click the **Setup** button, then click the **Contacts** button to open the **Setup Contacts** screen. Click the **Donation Funds & Thank You Letters** button. Before adding any new funds, click the button for **Setup Default Donation Fund Letter**. This will open MS-Word.

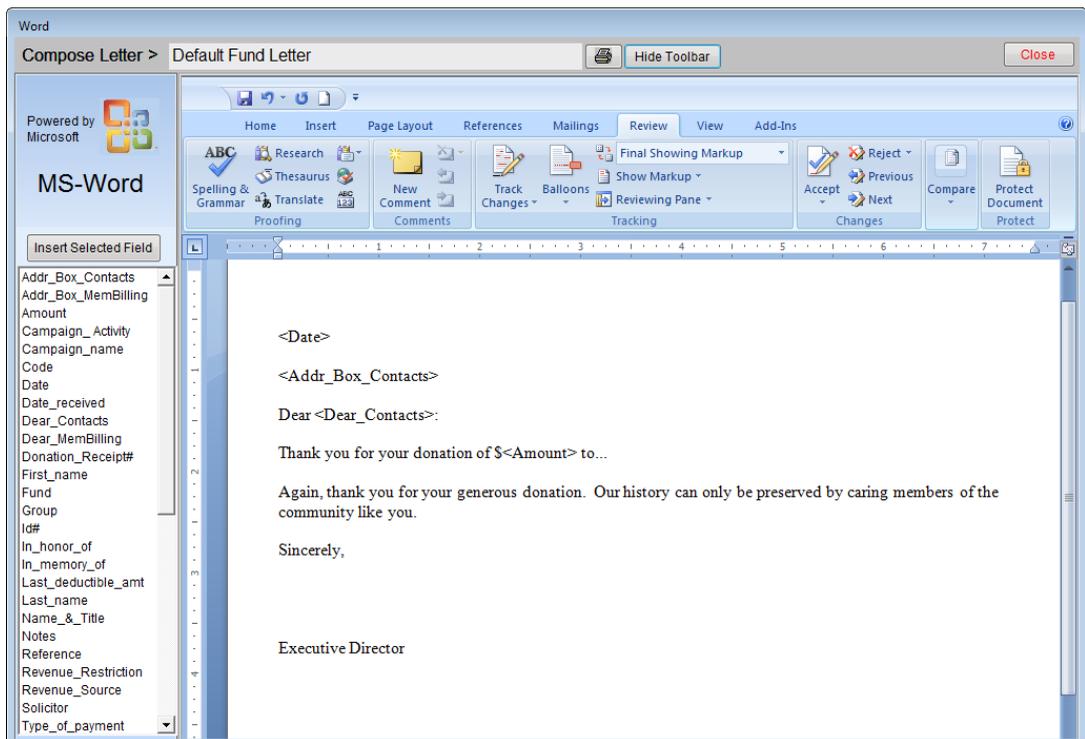
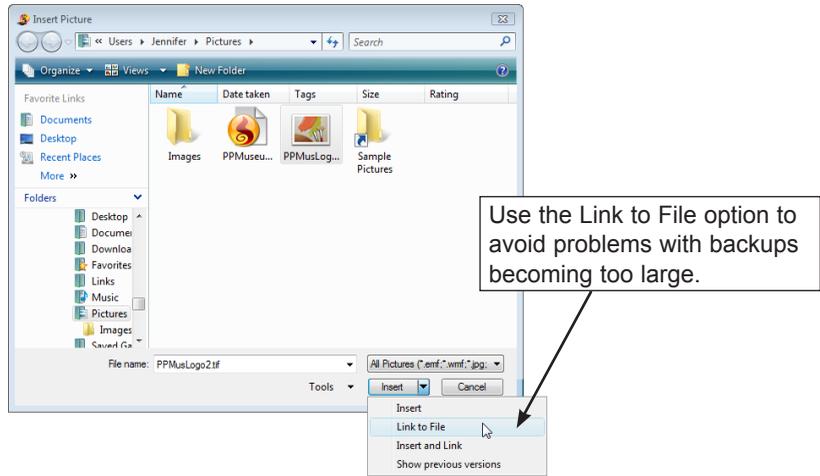


Figure 22-7 Compose Letter - Default Fund Letter

First, add your museum’s logo to the top of the page. If you do not want it to appear on all pages, do not put it in the header. Click on the top line of the letter, then in the MS-Word Toolbar, go to Insert Picture.

Figure 22-8
MS-Word
Insert Picture
screen



Navigate to the image saved on the hard drive (or other drive), then click on the image. Click the arrow next to insert and click **Link to File**. The image will appear on the screen.

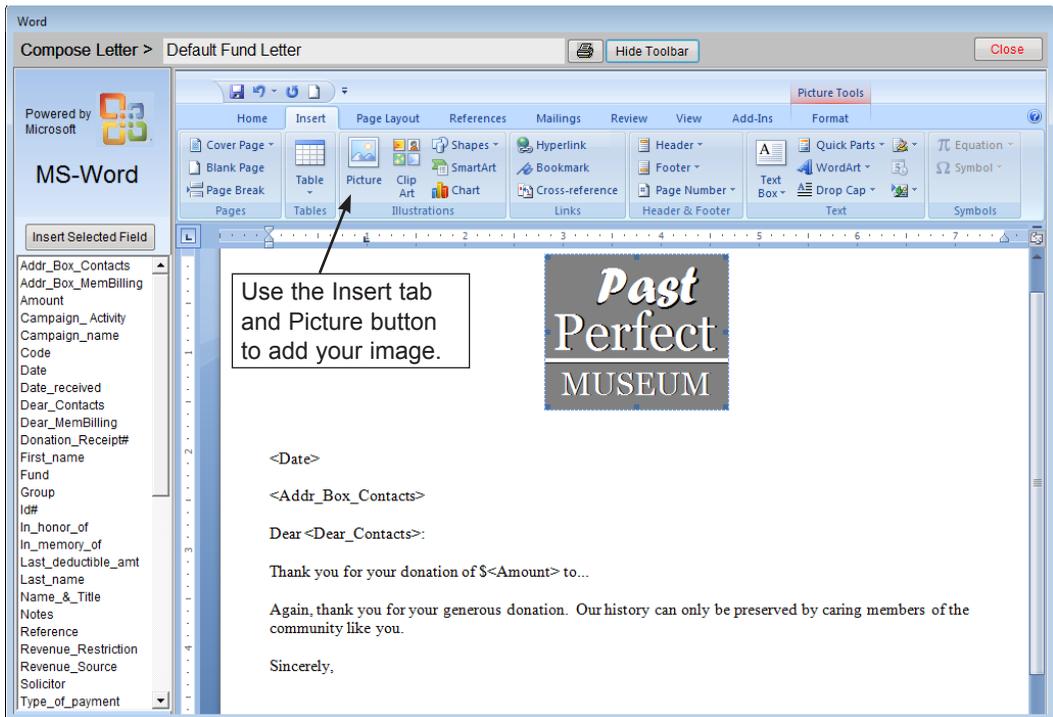


Figure 22-9 Default Fund Letter with logo

You may use MS-Word's Picture Tools to resize and move the image. Center the image on the top of the page, as in Figure 22-9.

Some fields are already inserted in the letter, such as the date, a field called **Addr_Box_Contacts** which contains the contact name & title, company and address information, and the **Dear_Contacts** line which is the Dear name. These fields will merge the date the letter is printed, the name, company and address of the recipient, and the Dear formal or Dear casual name of the recipient. Let's say you want to change the font of this text, and the rest of the text in the letter. Highlight all the text on the screen, then go to the Font list in the MS-Word Tools and choose a different font. For this example, choose Arial.

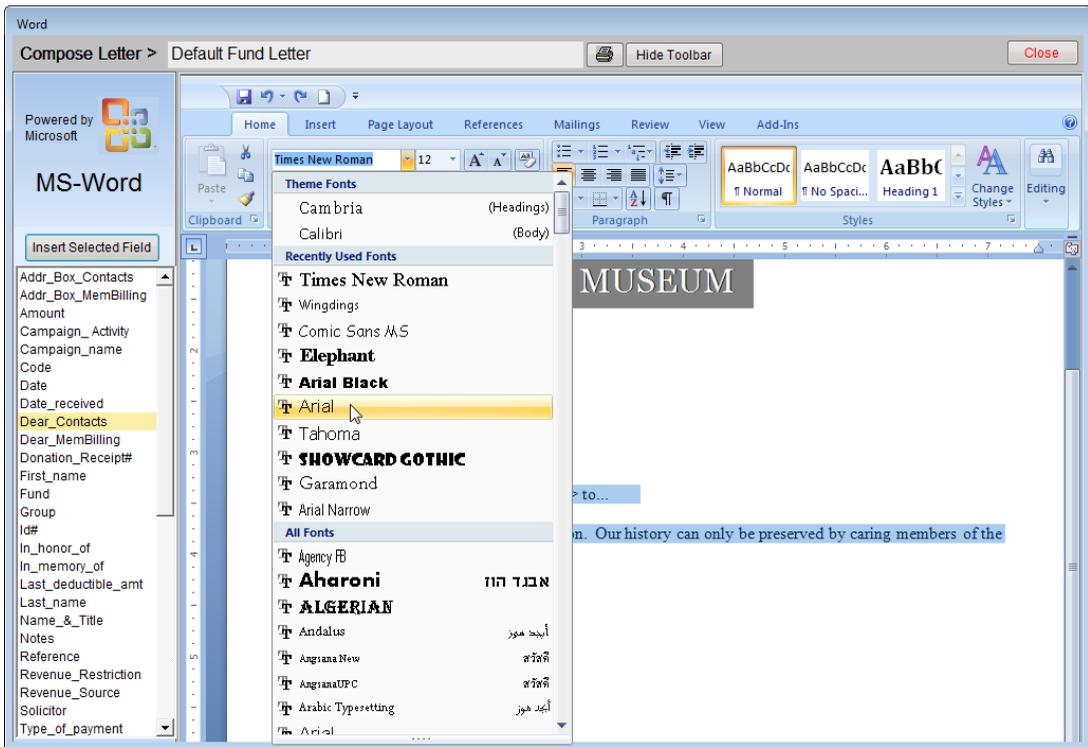


Figure 22-10 Default Fund Letter, choose font

Next, add a few lines of text that will appear on all donation thank you letters. To enter this text, click once in the body of the letter to move the cursor to the appropriate area, and then start typing. To have the amount of the donation automatically included on the letter, select the **Amount** field name on the left, then click the **Insert Selected Field** button. Add the appropriate currency symbol (such as the \$,

€ or £ symbols) before or after the inserted field. This symbol will need to be outside of the angle brackets.

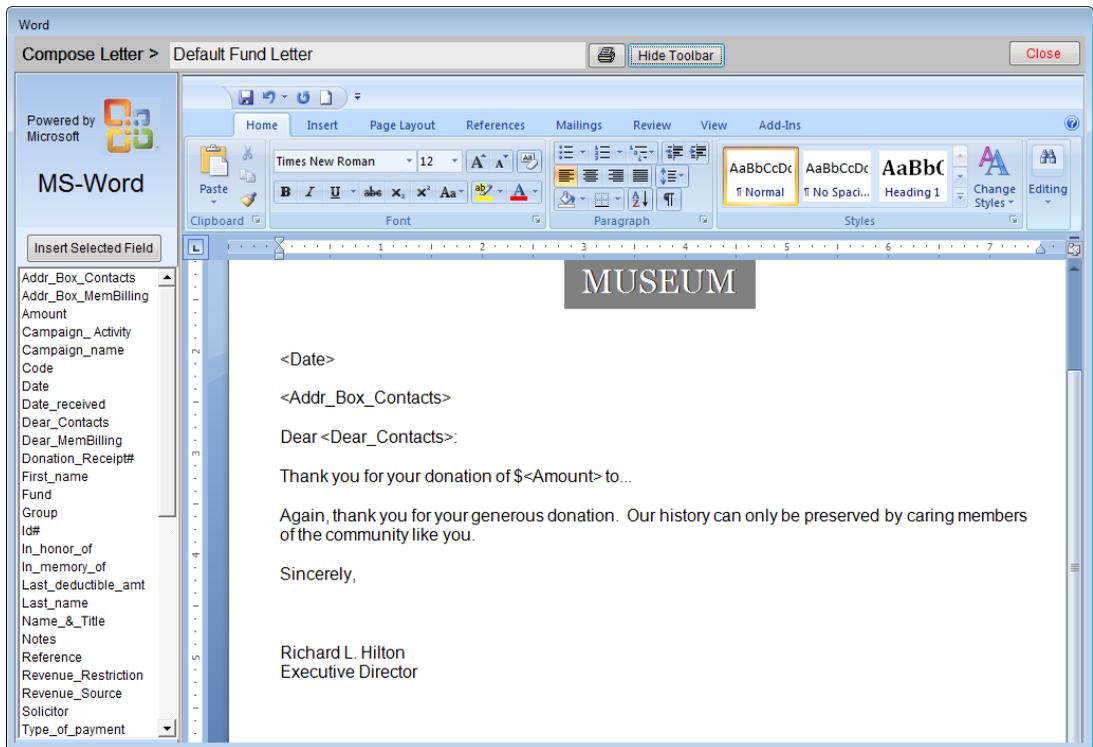


Figure 22-11 Default Fund Letter with text in Arial

Finish the letter with your signature lines. Let's say you have the signature of your director as an image file. You can insert this image on the letter so the director doesn't have to sign each letter. Again use the Insert Picture and Link to File option in the MS-Word Toolbar to insert the signature image. Move and resize the signature using the MS-Word Picture Tools so it is lined up on the left. Your letter should look like the letter in Figure 22-12.

Once the letter is ready, click **Close** at the top, then click **Yes** to save the changes. You are ready to add Donation Funds and compose your Donation Fund Letters, which will use this letter as the template.

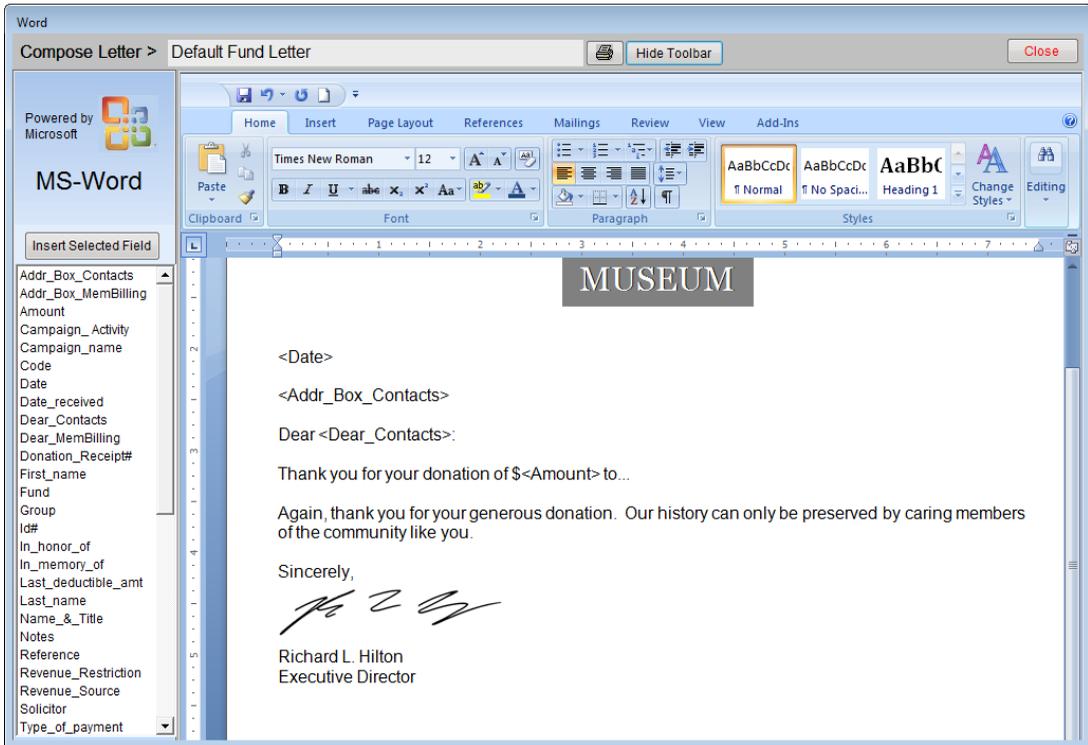


Figure 22-12 Default Fund Letter with signature

COLLECTIONS DEFAULT LETTERS

When you click **Collections** on the Setup menu, you will see the screen shown in Figure 22-13. This screen will default to showing the Accessions screen view.

To create a default Accession Thank You Letter, click the **Setup Default Thank You Letter** button, seen in Figure 22-13. These letters are usually sent to donors with the Deed of Gift.

To create a default Temporary Custody Thank You letter, click the button **Temporary Custody**, then click the button for **Setup Default Thank You Letter**, seen in Figure 22-14. These letters are sent after receiving items that you entered in Temporary Custody.

Setup Collections

Accessions

Exhibits

Incoming Loans

Outgoing Loans

Temporary Custody

Accessions

Enter below your institution's name, legal language transferring ownership, and a footer for a Default Deed of Gift. This information will be used each time you create a new Accession record and Deed of Gift.

Default Deed of Gift

Your Institution Name
300 North Pottstown Pike, #200
Exton, Pennsylvania 19341
Toll Free: 1-800-567-8080

Default Legal Custom Legal

I own the personal property described below and desire to give said personal property to the PastPerfect Museum. I do hereby irrevocably and unconditionally give and transfer to the PastPerfect Museum all right, title, and interest, including all copyright, trademark, and related interests, in and to the following described property.

Footer:
THE GIFT DESCRIBED ABOVE IS ACCEPTED FOR THE PASTPERFECT MUSEUM.

Default letters save time and offer a way to create templates on which individual letters will be based. Before you compose your first Accession Thank You Letter, modify the Default Thank You Letter with margins, address fields, a signature, etc. When you compose a new letter, it will start with the settings and fields from your default letter.

Please Note: When you edit the default letter, the changes will only be reflected in new letters. Letters composed prior to changing the default will remain the same.

[Setup Default Thank You Letter](#)

You can also select a default accession type for the Received As field. If you usually receive collection items as gifts, you can set "Gift" as the default selection.

Default Received as:

[Exit](#)

Click here to set up your Default Accession Thank You Letter.

Figure 22-13 Setup Collections, Accessions Screen View

Setup Collections

Accessions

Exhibits

Incoming Loans

Outgoing Loans

Temporary Custody

Temporary Custody

Enter your institution's name and address in the fields below. This information will appear every time you print a Temporary Custody Receipt.

Name & Address on Temporary Custody Forms

Your Institution Name
PastPerfect Museum

Your Institution Name & Address
PastPerfect Museum, 312 Main Street, Pastville, PA 10234 425/555-1256

Default letters save time and offer a way to create templates on which individual letters will be based. Before you compose your first Temporary Custody Thank You Letter, modify the Default Thank You Letter with margins, address fields, a signature, etc. When you compose a new letter, it will start with the settings and fields from your default letter.

Please Note: When you edit the default letter, the changes will only be reflected in new letters. Letters composed prior to changing the default will remain the same.

[Setup Default Thank You Letter](#)

Click here to set up your Default Temporary Custody Thank You Letter.

Figure 22-14 Setup Collections, Temporary Custody Screen View

On either screen, click the **Setup Default Thank You Letter** button to open MS-Word. The letter that you set up here will be the template for all new letters added after you set up or change this letter. Changes will not be applied to existing letters.

Collections default letters are similar to Contacts default letters, with one exception. In Temporary Custody and Accessions, it is possible to record up to four separate donors on an individual accession or temporary custody receipt. The Accessions and Temporary Custody Default Letter screens enable you to create four separate default thank you letters, one for each donor. You can switch between the letters by clicking on the Donor # buttons on the Sidebar. Be sure to use the correct donor fields when inserting fields. For example, on the Donor #2 Letter, use the name, address, and phone number fields with the “_donor2” at the end.

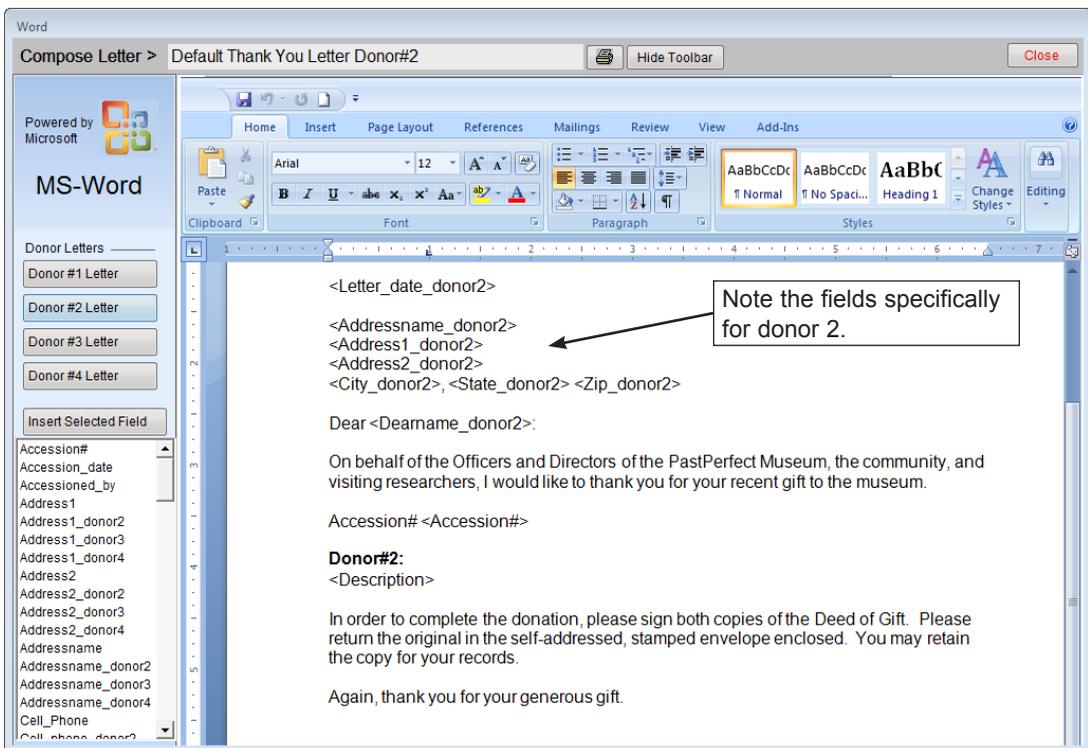


Figure 22-15 Default Thank You Letter for Donor #2

COMPOSING LETTERS

Once your default letters are set up, you are ready to start composing your Collections and Contacts letters. When each new letter is added, PastPerfect will use the appropriate default letter template that you created. Each letter can be modified using the same tools for inserting fields and composing the letter in MS-Word as were available when creating your default letters. For more information about using these tools, please review the sections for Inserting Fields and Using MS-Word Tools from earlier in this chapter. Let's look at the different types of letters and where they are composed.

CONTACTS LETTERS

Donation Fund Thank You Letters are generated after posting a donation payment on the **Enter Donation Receipt** screen or later from the **Donation Detail** screen. Each letter is linked to a Donation Fund. When you enter a donation and choose a fund, the thank you letter you print is based on the fund you selected. To set up Donation Funds, on the Main Menu click on **Setup**, then **Contacts**. On the Setup Contacts screen, click **Donation Funds & Thank You Letters**. To create a new Donation Fund, click the **plus sign** button and enter the name of the fund. After you click **Add**, the new fund will show up on the list of Donation Funds.

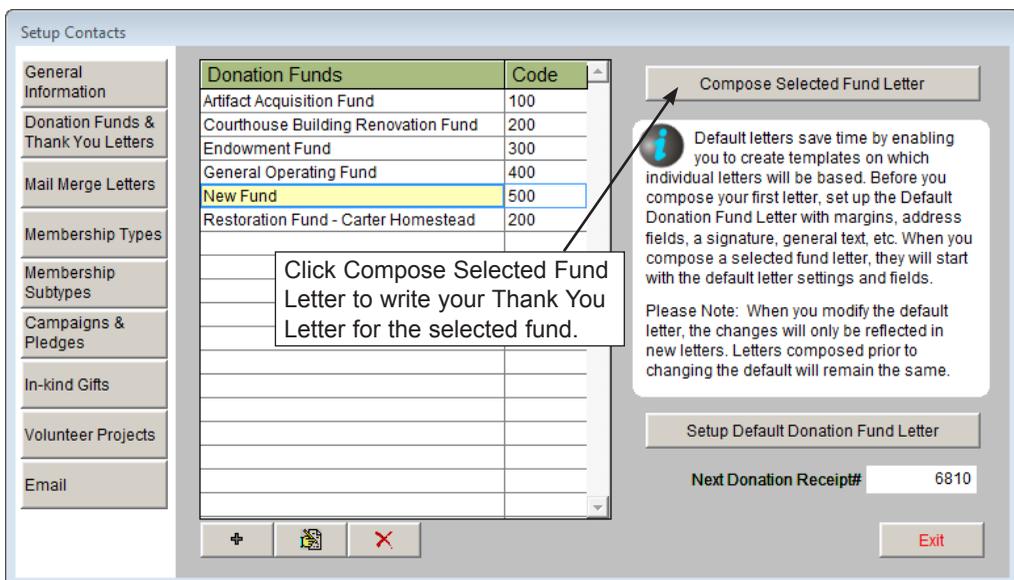


Figure 22-16 Donation Funds & Thank You Letters screen

Select the fund by clicking on it, then click the **Compose Selected Fund Letter** button (seen in Figure 22-16) to open MS-Word. If you have set up a default letter, that letter will appear. As you can see in Figure 22-17, the default letter set up earlier appears here. Compose the text of the letter, inserting fields as needed. The text should be specific to this particular fund.

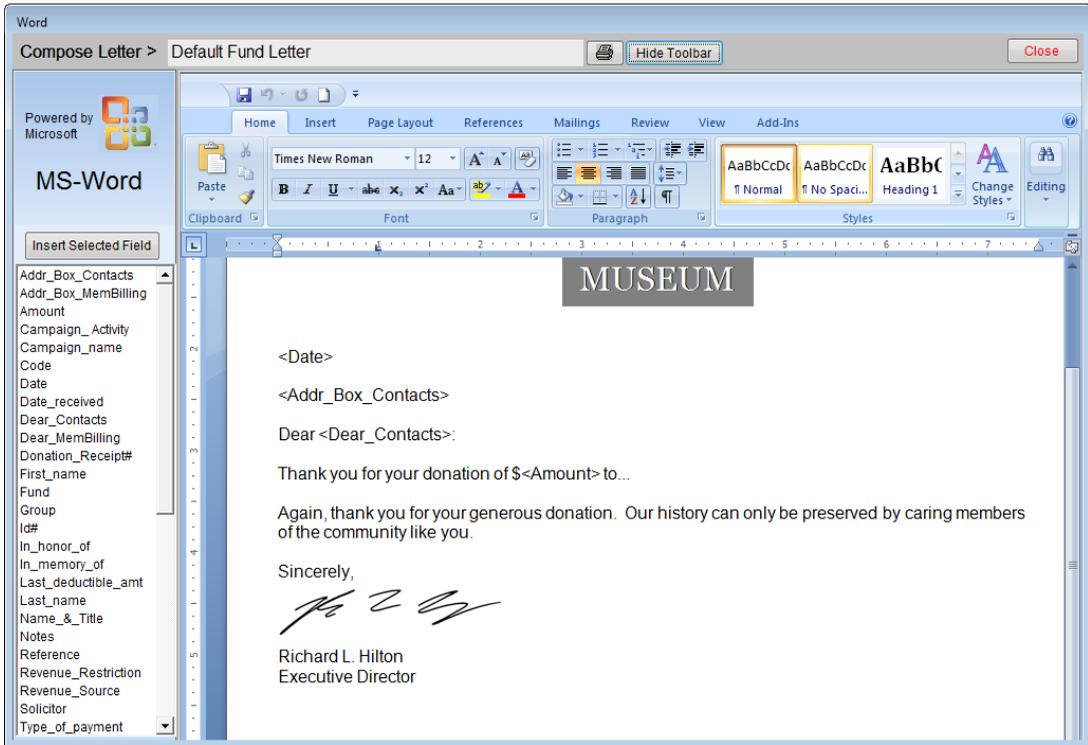


Figure 22-17 Compose Donation Fund Letter with default text

When you are finished, click **Close**. If you want to edit an existing letter, simply highlight the fund and click **Compose Selected Fund Letter**.

Mail Merge Letters encompass a wide range of letters. These are all letters that are not specifically created anywhere else in the program. They usually include membership letters, such as renewal thank you letters and overdue reminders. They may also be invitations to events, donation solicitations, newsletters, and anything else you need to send to your contacts. To compose these letters, click **Setup** on the Main Menu, then click **Contacts**. Click the **Mail Merge Letters** button to open the screen where you create your letters, seen in Figure 22-18.

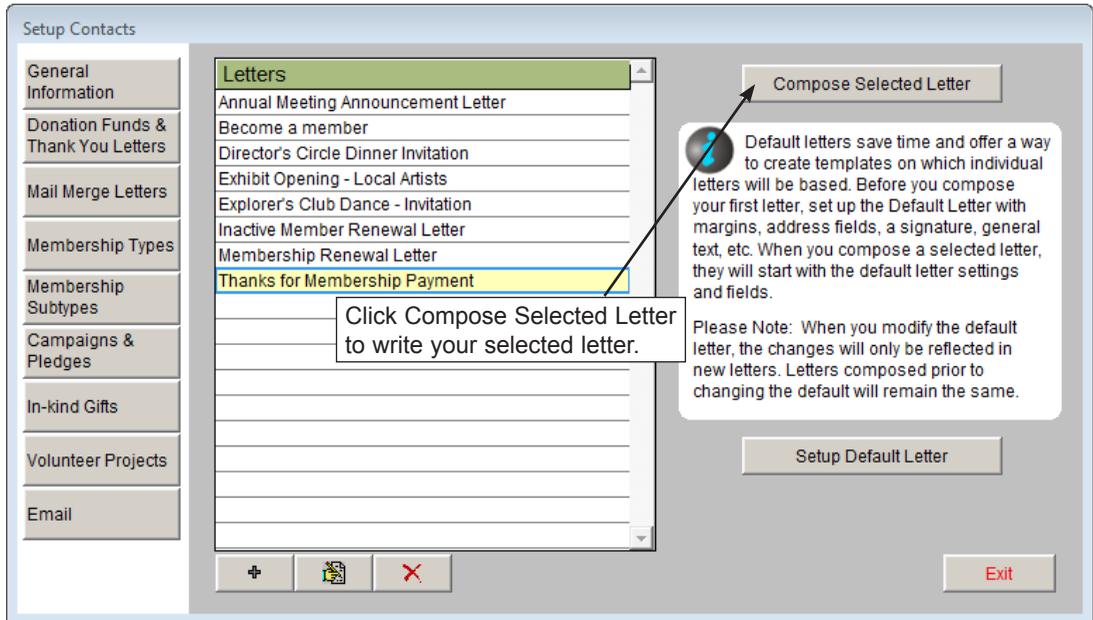


Figure 22-18 Mail Merge Letters screen

To add a new letter, click the **plus sign**. Enter the name of the letter and click **Add**. Highlight the new letter and click **Compose Selected Letter** to open MS-Word. To edit an existing letter, click on the letter and click **Compose Selected Letter**.

NOTE

Correspondence to billing members should use “Addr_Box_MemBilling” instead of the regular address box field of “Addr_Box_Contacts.” “Addr_Box_MemBilling” will give you the primary or secondary billing address, depending on the date. Use “Dear_MemBilling” instead of the regular “Dear_Contacts” field.

Pledge Thank You Letters are generated after a contact makes a pledge to your institution. They are printed from the **Enter a New Pledge** or **Pledge Detail** screen. The letters are linked to campaigns, so each campaign has a different Pledge Thank You Letter. To compose these letters, click on **Campaigns** on the Main Menu. If you do not have the campaign created, click **Add**, then enter a campaign name, start date, end date, and other information, then click **Save**. Once the campaign is created, click the **Setup Pledge Thank You Letter** button on the Sidebar to open MS-Word and compose your letter.

The screenshot shows the Campaign Management interface. At the top, there's a toolbar with navigation and action icons. The main area is divided into several sections:

- Campaign Information:** Campaign name '2009 Annual Fund Drive', Manager 'Smith, Elizabeth', Fund 'General Operating Fund', and Purpose 'Donations will support the general operations of the museum.' Dates include Start Date (01/01/2009), End Date (12/31/2009), First Receipt (05/03/2008), Last Receipt (11/24/2009), and Last New Member (01/15/2009).
- Progress to Goal:** A vertical bar chart showing progress from 0% to 100%. The current progress is approximately 28%, with a red bar for the goal and a green bar for the actual progress. A red circle is at the bottom of the chart.
- Campaign Activities Table:**

Activity	New Members	Cost	Goal	Pledged	Received
Annual Appeal Letter	1	700.00	25,000.00	10,100.00	6,475.00
	0			0.00	0.00
	0			0.00	0.00
	0			0.00	0.00
	0			0.00	0.00
	0			0.00	0.00
	0			0.00	0.00
	0			0.00	0.00
Miscellaneous	0			0.00	0.00
Totals	1	700.00	25,000.00	10,100.00	6,475.00
- Left Sidebar:** Contains buttons for 'Setup Pledge Thank You Letter', 'Setup Pledge Payment Reminder Letter', and 'Change Campaign Name'. A callout box points to the 'Setup Pledge Payment Reminder Letter' button with the text 'Click here to compose your Pledge Letters.'

At the bottom, it shows 'Record 7 of 8', 'Campaign# 8', 'Updated by Unknown', and 'Updated 01/15/2009 01:39 PM'.

Figure 22-19 Campaign Management screen

Pledge Payment Reminder Letters are generated after a contact makes a pledge to remind him or her of the scheduled upcoming pledge payment. These letters, like the Pledge Thank You Letters, are linked to campaigns and are printed from the **Enter a New Pledge** or **Pledge Detail** screen.

Once the pledge has been posted, you may view the **Pledge Detail** screen, seen in Figure 22-20. On this screen you have the option to view the **Default Reminder Letter**, which is the letter specific for the campaign. You may further modify that letter on the MS-Word screen if you need to tailor the letter specifically for this donor. To print that reminder letter (including modifications) with merged information, click the **Selected Payment Reminder Letter**. The information merged into the letter comes from the Schedule of Payments on the Pledge Detail screen. For more information about the Pledge Detail screen and the pledge letters, please see *Chapter 23 - Campaigns and Pledges*.

To compose these letters, click on **Campaigns** on the Main Menu. Find your campaign record and click the **Setup Pledge Payment Reminder Letter** button, seen in Figure 22-19, to open MS-Word and compose your letter.

Temporary Custody

Record View
View All Receipts
View Active
View Accessioned
View Loaned
View Returned

More Screens
Thank You Letter
Add/View Additional Donors
Update History

Actions
Accession or Loan
Transfer to Returned File

Temporary Custody Receipt No. 1 Date Received 01/04/2008

Source Packwood, Neil Jr.
Contact
Address 12343 Elmwood Drive
City, State, Zip Perfectown PA 19822
Email, Country paker@yahoo.com
Home Phone 610/555-2356 Fax 610/555-6788
Work Phone 610/555-6789 Ext 210 Cell/Pager 610/555-8473
Website
Credit Line
Where Acquired Inherited from Neil Packwood Sr.
Who Acquired Family heirloom collection When Acquired 1900-1915
Received by Lufkin, Joseph Received as Gift
Return by 01/09/2009 Returned
Interim Location

Accession#
Incoming Loan#

ID#	Name
Donor 1	Packwood, Neil Jr.
Donor 2	
Donor 3	
Donor 4	

Dataset

Field 01
Field 02
Field 03 / /
Field 04
Field 05
Field 06

Description
1 Engagement Ring, 19th century diamond
1 Book, Bread from God 1901
1 Letter Ethel Gregory to Neil Packwood Sr. 1888
1 Photo Ethel & Neil Packwood Sr. wedding 1902

Notes
The Packwood family has been prominent in the Perfectown area since the Revolutionary War Period. The family patriarch, Horace W. Packwood, was a pioneer in the area, receiving a land grant in 1770. Neil Packwood Sr. was a Chester County Justice of the peace from 1875 to 1915.

Record 14 of 19 Updated by Unknown Updated 01/28/2009 01:28 PM

Figure 22-21 Temporary Custody screen

The **Accession Thank You Letter** is printed after entering an Accession. It gives the donor a list of the items they donated and thanks them for the gift. It usually accompanies the Deed of Gift form. To compose and print the letter from the Accession screen, click the **Thank You Letter** button on the Sidebar, seen in Figure 22-22, which will open MS-Word. If you have made changes on the default letter and you want to use the modified default here, or you have edited the Accession record, click the **Rebuild Letter** button to overwrite your existing letter and pull in those changes.

NOTE All letters are backed up when you back up Multimedia files. They are not included in the data backup.

Accession

Sort by Accession#

Accession# 2000.1 Other#

Received as Gift

Received by Parr, Mary

Received Date 05/06/2000

Accessioned by Parr, Mary

Accession Date 05/06/2000

Price or Value Calculate

Dataset

Contact ID# 15

TC Receipt#

City, State, Zip Pastville TN 37022

Source Carter, Rose Ellen

Contact

Address 3452 Hipkins Lane

Email, Country

Home Phone / - Fax / -

Work Phone 610/555-6543 Cell/Pager / -

Website

Credit Line In memory of Ebenezer J. Carter b.1817 - d.1876.

More Screens

Thank You Letter

Deed of Gift

Add/View Additional Donors

Update History

Actions

Add New Catalog Records

Edit, Delete, or View Catalog Records

Add New Activity

Edit Activity

Change Accession#

Accession Includes 4 Catalog Records

Object ID	Object Name	Title	Description / Summary
P 2000.1.1	Tintype	Beatrice and Bernadette	Hand-colored tintype of two young women, Beatrice Schmidt and Berna
L 2000.1.3	Book	Guide for a Small Map Collectio	Guide for a Small Map Collection is directed to those who, though they l
P 2000.1.4	Print, Photographic	Peg's Graduation	Photograph of nine people. The four adults are seated in the front row a
A 2000.1.5	Book, Baby	Our Baby John Lawrence McWi	Baby book published by the Whitman Publishing Company. The baby b

Record 5 of 26

Updated by Unknown

Updated 04/21/2006 12:55 PM

Figure 22-22 Accession screen

PRINTING CONTACTS MAIL MERGE LETTERS

PRINT ONE LETTER FROM THE CONTACTS SCREEN

To send a letter to one individual, go to the Contacts screen for that individual and click the **Print** button at the top of the screen. The screen in Figure 22-23 will appear. Highlight the letter on the **Letters on File** list that you wish to send to this contact. Select the **Dear Formal** or **Dear Casual** greeting to be used, then click **Print Letter**. This will open your letter in MS-Word. Notice that the information from the contact record is now filled in automatically in the mail merge fields. You may edit the letter at this point. However, keep in mind that changes made here will only change this particular letter for this particular contact, for this printing. The mail merge letter on file and the default letter remain unchanged.

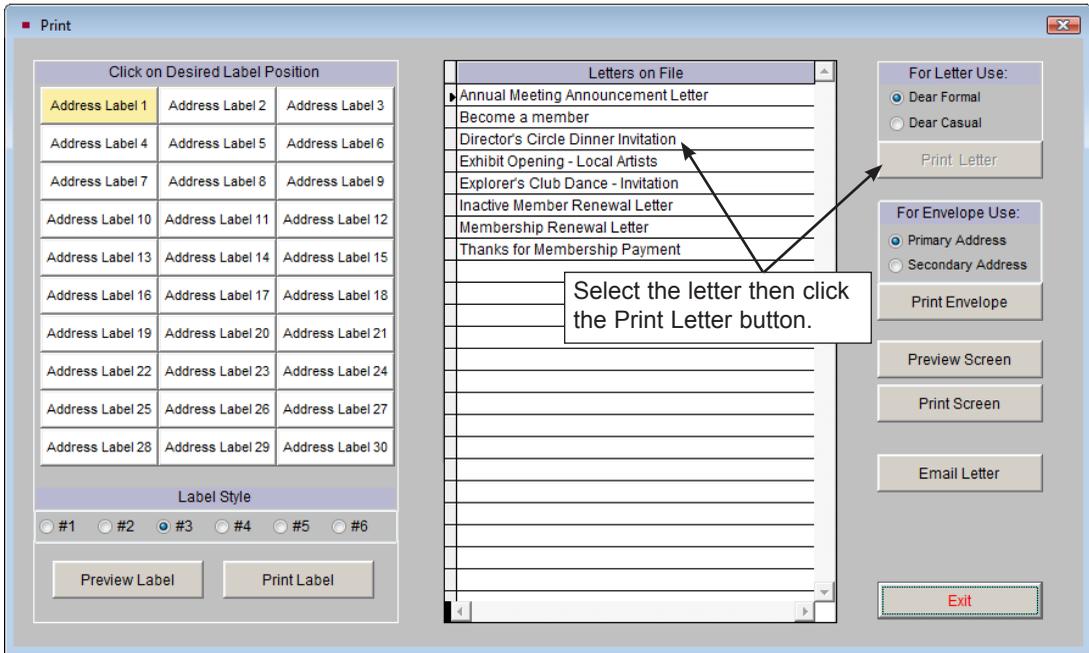


Figure 22-23 Contacts Print screen

When the letter is ready to print, click **Print this Letter** on the Sidebar. Your printer dialog box will appear so you may print your letter.

Add Entry To Mailing Log

After printing letters or labels or sending an email, when you close the letter screen a dialog box will appear asking you if you would like to add an entry into the contact's mailing log. This allows you to track what you sent, when you sent it and who received it. It is suggested that you always add entries to the mailing log unless the mailing was sent as a test or duplicate. The date and time, type of mailing, recipient's name and description fields are filled in automatically.

To add the entry to the mailing log, enter your initials in the **By** field. If you want the notes included in the log, check the **Also Include Notes In Contact Log Entry** box. Enter any additional information in the **Notes** field. Then click **Yes**.

PRINT MULTIPLE LETTERS USING A CONTACT LIST

To print a mailing for a group of contacts, select **Contact Lists** from the PastPerfect Main Menu. This will open the **Contacts List Manager** screen, which shows all the mailing lists, both User Defined Lists and Fixed Lists. Select the desired list and click **View Selected List** on the Sidebar.

TIP

To send a membership letter to one contact per membership, start by choosing the Billing Members Fixed List.

The screenshot shows the 'View Contact List' interface for the 'Director's Circle Dinner List'. The sidebar on the left contains the following options: 'View Records', 'Print, Export and Email', 'Map Contact List', 'Global Change', 'Narrow List', and 'Reset List'. The main area displays a table of records with the following columns: ID#, Name and Title, Address1, City, State, Zip, and Donations. The table contains 11 records. A callout box with an arrow points to the 'Print, Export and Email' button in the sidebar, with the text: 'Click here to print letters for contacts on the list.'

ID#	Name and Title	Address1	City	State	Zip	Donations
1	Richard Hilton, Chief Software Architect	300 N. Pottstown Pike	Exton	PA	19341	1550.00
3	Melissa Potter	1234 North Main Street	Perfectown	HI	96345	975.00
8	Mr. and Mrs. Bernard Blaine	3456 3rd Avenue	Tamaqua	PA	10334	22500.00
9	George M. Kittridge	68000 State Route 11	Perfectown	PA	19588	38000.00
16	Millicent Carter, CEO	3456 South Parsable Drive	Perfectown	PA	19876	16400.00
23	Neil Packwood, Manager	12566 Elmwood Drive	Perfectown	PA	19811	6000.00
24	Ian J. Smithson, President	1300 North Placer Avenue	Westgrove	PA	19654	9600.00
27	Henry T. Hanover	1254 Pomeroy Ave.	Pastville	PA	19345	4000.00
	Manager	2314 1st Avenue W.	Pastville	PA	10344	1500.00
		6754 W. Center Street	Pastville	PA	19342	100.00
		451 Walnut Street	Philadelphia	PA	19104	0.00

Figure 22-24 View Contact List screen

Clicking the **View Selected List** button will bring up the View Contact List screen which displays the contacts on the list on a grid as in Figure 22-24. You may use the **Narrow List** button to target specific contacts on the list. See *Chapter 21 - Contact Lists* for more information on narrowing lists. Click the **Print, Export and Email** button on the Sidebar to continue printing.

In the Print/Export Settings area, seen in Figure 22-25, you may choose to exclude Life Members or contacts marked with Stop Mail from the mailing. To avoid mailing to contacts with Stop Mail checked, remove the check from the **Include Contacts Marked Stop Mail** box in the Print/Export Settings section. To exclude Life Members, remove the check from the box next to **Include Life Members**. Also, if you use primary and secondary addresses, to ensure you have the correct addresses, make sure the date in the **Mailing Date** field is the date you are sending the mailing.

Figure 22-25
Print/Export
screen



To print one of your Mail Merge letters, in the Print/Export Options section, click the radio button next to “Print Letters,” then click **Print**. This will open MS-Word, as in Figure 22-26. You have a few selections to make on this screen.

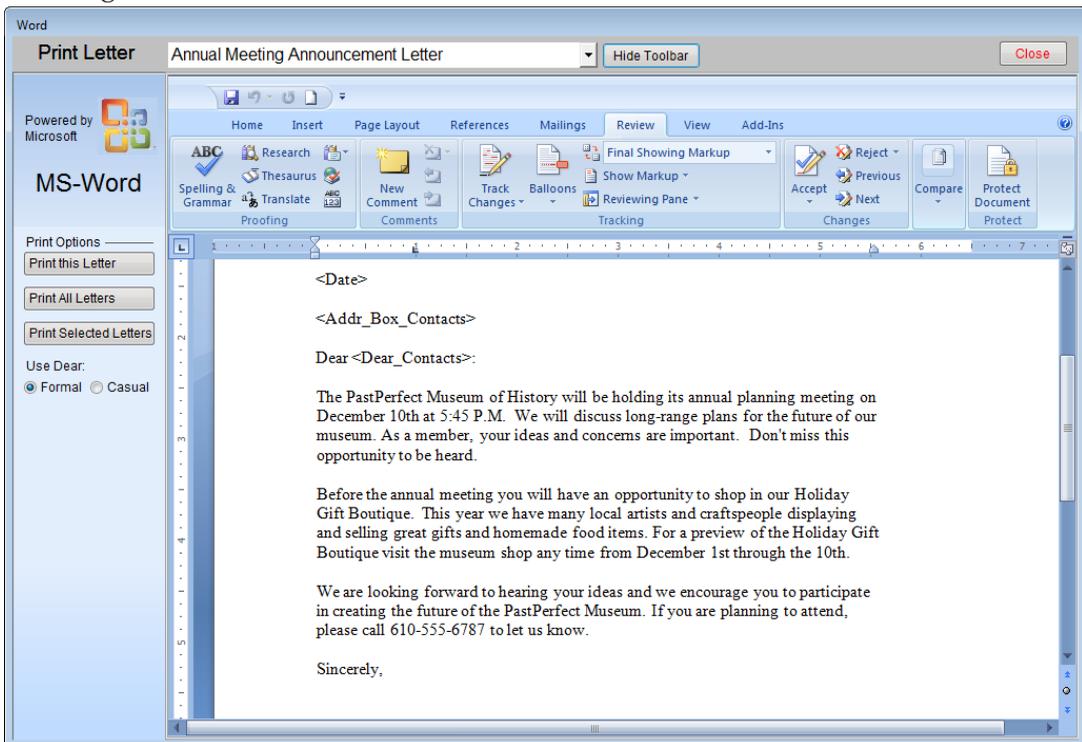


Figure 22-26 Word screen

The Print Letter window shows you the titles of Mail Merge Letters in a drop-down menu. Click the down arrow to the right of the window to view your list of composed letters. Click on a letter to select it. The selected title will appear in the title window and the MS-Word document will display the selected letter.

Use Dear Formal or Casual - Select whether you want to print the letter using the Dear Formal or Dear Casual name for the selected letters. Click on the radio button to choose Formal or Casual.

Once you have selected your letter and your Dear type, you may print your letter using the Print Options.

Print this Letter - This option prints the letter without the merged data from the contact records. You will see the inserted field names, your letter text and formatting. This can be helpful if you want to print and review a test letter.

Print All Letters - This option merges data from the contact records into the selected fields and sends a letter for each contact on the list to your printer.

Print Selected Letters - This option allows you to go through the letters one at a time and decide to print or not print each letter, or specify a range of letters to print. This will also merge data from the contact records into your letters.

After your letters print, be sure to add the entry to the mailing log, so you can track the mailing later.

SETTING UP LABELS AND ENVELOPES

In addition to printing letters, PastPerfect gives you the ability to print mail merge labels and envelopes. There are six label styles you may choose from, in addition to an envelope. If the default styles do not give you what you want, you may modify the labels. The default styles are as follows:

Style #1 - This label includes the Name & Title, Company (if filled in), Address1, Address2, City, State, and Zip. Prints on an Avery 5160 mailing label, 1" x 2⁵/₈".

Style #2 - This label includes the Name & Title, Company (if filled in), Address1, Address2, City, State, Zip and barcode (with the Barcode Printing Upgrade). Prints on an Avery 5160 mailing label, 1" x 2⁵/₈".

Style #3 - Set up to be a membership card, this label includes the member's first name and last name, Address1, Address2, City, State, Zip, Home Phone, Date Joined and Membership Type. You may add your museum's name and logo. This card can be set up for any size paper, with the default being an Avery 5371 business card, 2" x 3¹/₂".

Style #4 - This label is set to print the billing address. If you have selected to use an alternate billing address for a member, that alternate address will be used. If you have not selected to use an alternate billing address for a member, or the contact is not a member, the regular mailing address fields will be printed, as on Style #1. Use this label if you use alternate billing addresses for memberships or have created a User Defined List that includes only billing members. Prints on an Avery 5160 mailing label, 1" x 2⁵/₈".

Style #5 - This label is also set to print the billing address. Use this label if you use alternate billing addresses for memberships or have created a User Defined List that includes only billing members. Prints on an Avery 5160 mailing label, 1" x 2⁵/₈".

Style #6 - Similar to Style #4 and Style #5, this label is also set to print the billing address. Use this label if you use alternate billing addresses for memberships or have created a User Defined List that includes only billing members. Prints on an Avery 5160 mailing label, 1" x 2⁵/₈".

Envelope - The envelope includes the Name & Title, Company (if filled in), Address1, Address2, City, State, and Zip. It is designed to fit on a #10 envelope.

These labels and the envelope may be modified to use a different size label or envelope, or to include different fields. Each label and the envelope can have two custom layouts that you can rename. To modify the labels and envelope, click on **Reports** on the Main Menu, then click the **Contacts** under Report Types. You will see the **Contacts Labels Styles #1-6** and **Contacts Letter Envelope** on the list of reports, as in Figure 22-27.

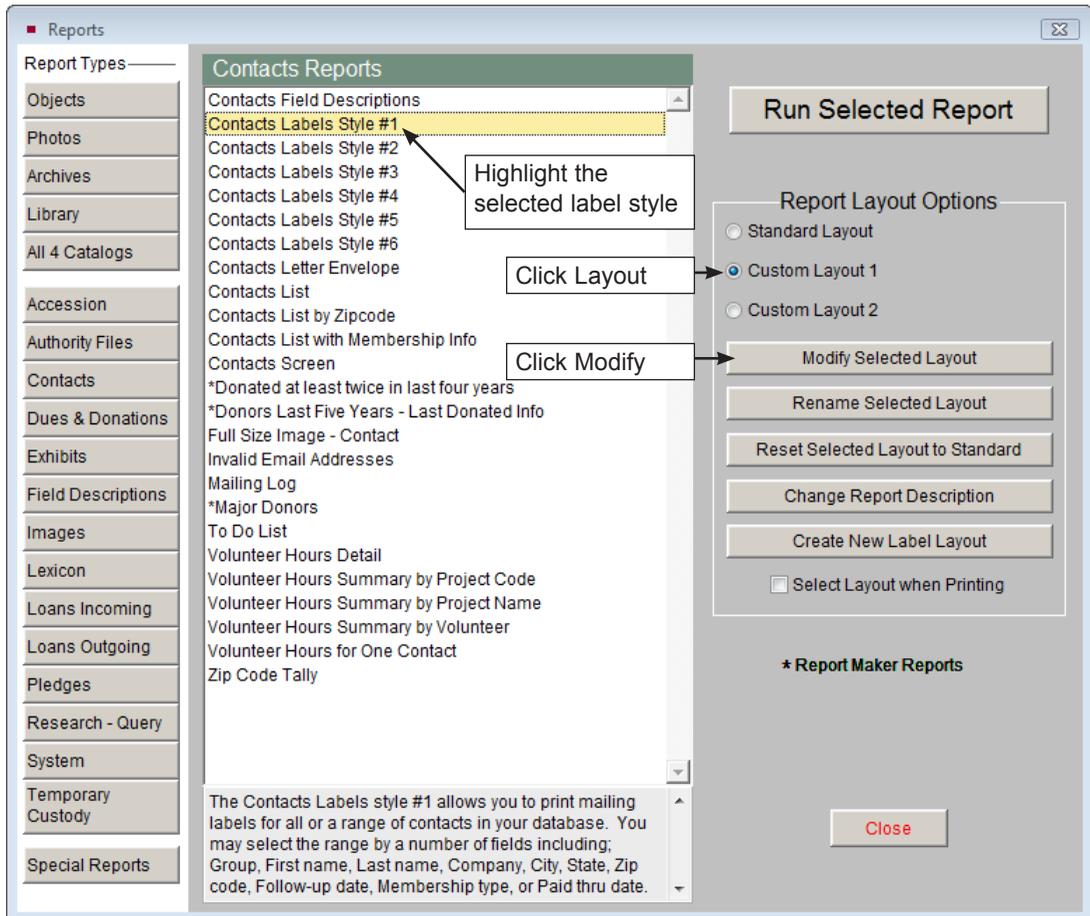


Figure 22-27 Contacts Reports screen

To modify a label, highlight the label style and select either **Custom Layout 1** or **Custom Layout 2** on the right. Then click **Modify Selected Layout** to open the Label Designer screen where you will make your modifications. Modifying labels and the envelope is similar to the report modifications discussed in *Chapter 19 - Advanced Report Modifications*.

Example Label Modification

To give you an example of what is possible with the labels, let's walk through an example. Your institution would like to change Label Style #1 to print the Paid Thru Date of members on labels, and change the font of the label. Here are the steps:

1. Open the Label Designer screen for Label Style #1, using the steps above.

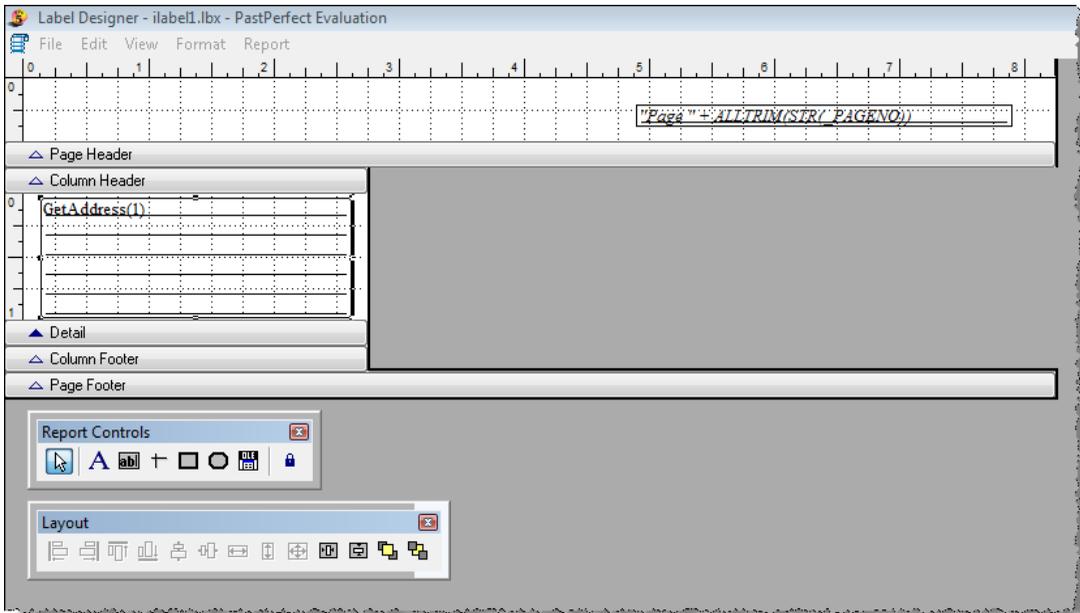
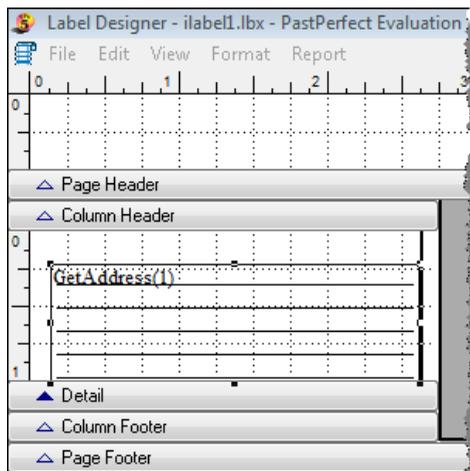


Figure 22-28 Label Designer screen

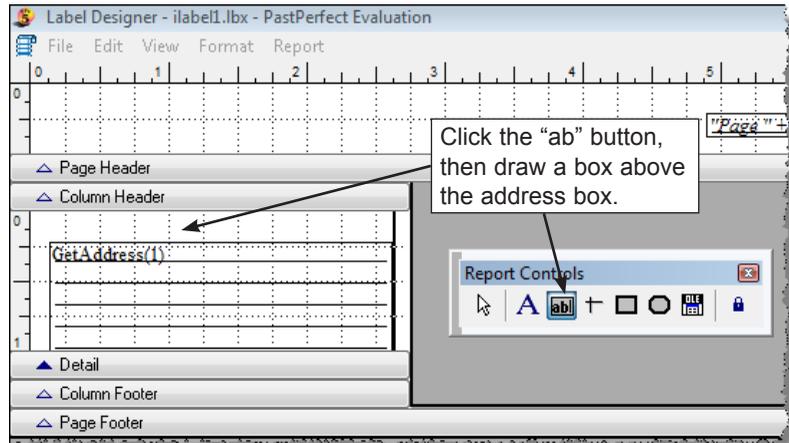
2. To add the field for Paid Thru Date, you first need to make space on the label. To do this, make the box containing the address, `GetAddress(1)`, smaller. Click on the box, then click on the handle (black dot) on the top edge of box. Hold the mouse button down and drag the mouse down. When you let go of your mouse, the box should be smaller, as in Figure 22-29.

Figure 22-29
Label with
shortened
address box



- To insert the Paid Thru Date field at the top of the label, find your **Report Controls Toolbar**. If you do not see it on the screen, go to **View** at the top and click **Report Controls Toolbar**. On the toolbar, click the **ab** button, then move your mouse to the space above the GetAddress(1) field.

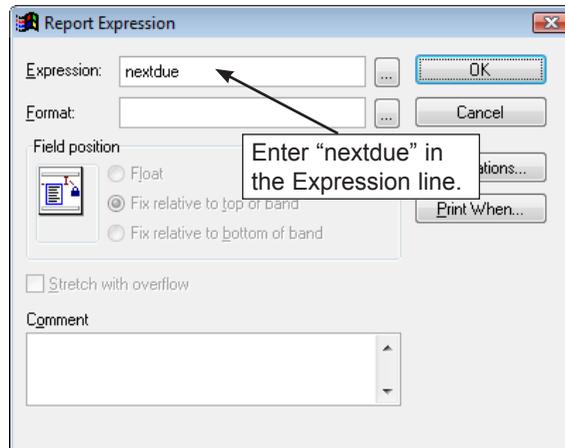
Figure 22-30
Label with
“ab” button



Click and draw a box with your mouse. When you let go, the **Report Expression** screen will appear.

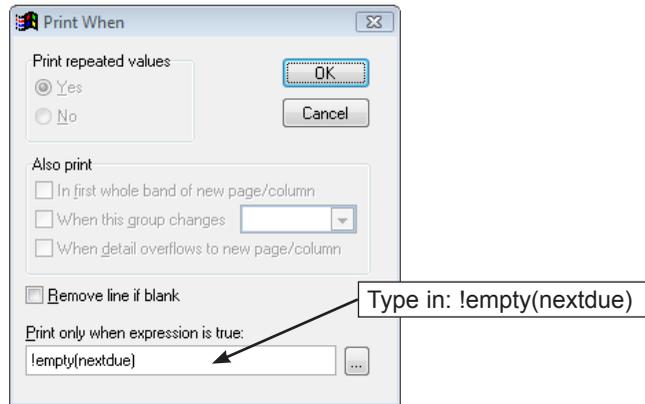
- In the **Expression** line, type in the field name for the Paid Thru Date field, which is “nextdue”.

Figure 22-31
Report
Expression
screen



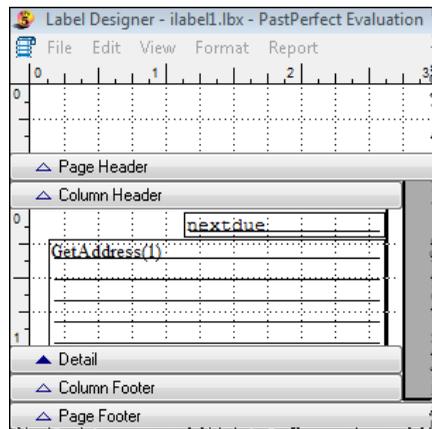
- Click the **Print When** button to open the Print When screen. In the field **Print only when expression is true**, type in “!empty(nextdue)” as in Figure 22-32. This will prevent the empty date field from printing if you use this label for non-members.

Figure 22-32
Print When
screen



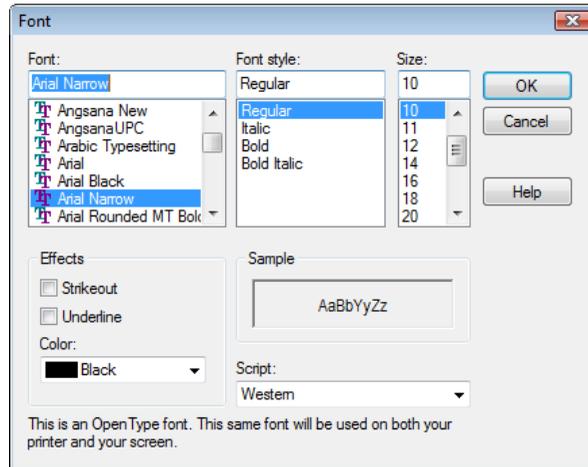
6. Click **OK** on the Print When screen, then click **OK** on the Report Expression screen to close the windows.
7. The **nextdue** field box will appear on your label. You may move the field to the appropriate location on your label by clicking on it and using the arrow keys on your keyboard. Make sure the field does not overlap any other fields. You may also want to make the field longer, by clicking on one of the center handles (small black boxes) on the left or right edge and dragging it out. You may also do this by holding down the **Shift** key and **Right Arrow** key on the keyboard at the same time.

Figure 22-33
Label with
nextdue field



8. Lastly, let's say you want to change the font of the entire label. Click **Edit** at the top and click **Select All**. This will select all the fields on the label. Then go to **Format** at the top and click on **Font**. You will see the screen in Figure 22-34.

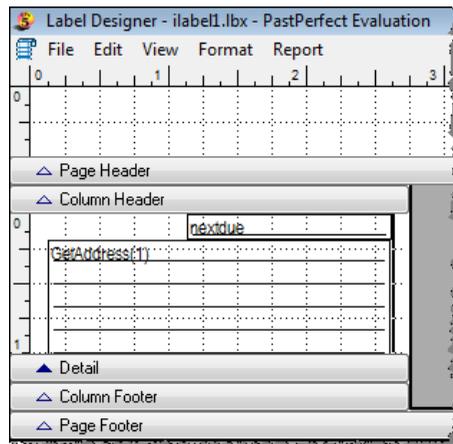
Figure 22-34
Font Screen



Choose the font and font size. Be sure to choose something small, so the text still fits on your label. Click **OK** to make the change.

9. Make sure your fields fit on your label without overlapping. They may touch so that there is a dark line in between the fields. If the fields overlap, they will not print.

Figure 22-35
Label with
new font



10. Once you are happy with the layout, click **File** at the top and **Save**, then click **File** again and click **Close**. As long as you have this label set to use this custom layout, it will print the label with these changes. You may rename the custom layout you modified by clicking the **Rename Selected Layout** button on the Reports screen. When printing your label, be sure to select Style #1. The labels should look like Figure 22-36.



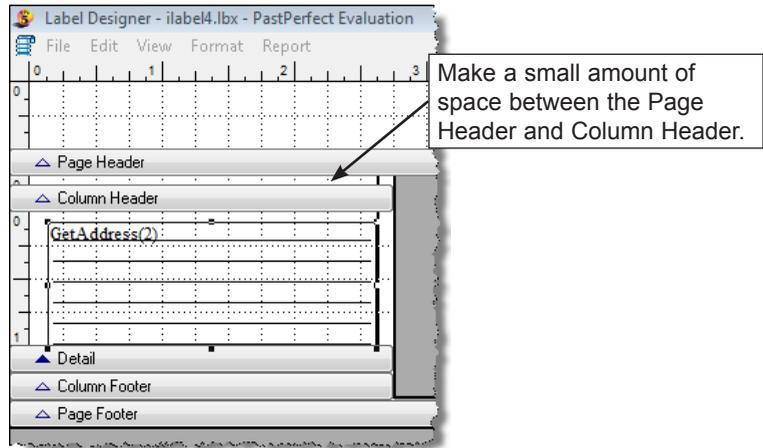
Figure 22-36 Preview of modified labels

Adjusting Label Paper for your Printer

Another common modification for labels is adjusting the label page so it prints out with the labels aligned properly. Each printer picks up label paper differently, so you may find your labels are too high or too low on the page. Here are the steps to make adjustments.

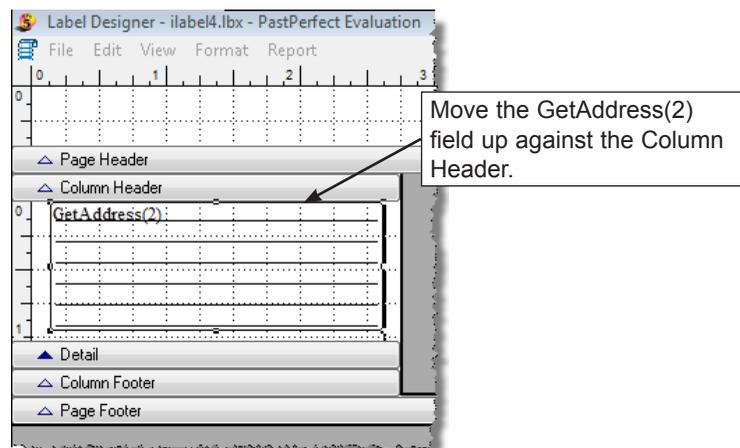
1. Open the **Label Designer** screen by clicking on **Reports** on the Main Menu, then the **Contacts** button, then highlighting the desired label style and clicking **Custom Layout 1** or **Custom Layout 2**. Click **Modify Selected Layout**.
2. If your labels are printing too high on the page, so that the tops of the labels are getting cut off, click on the **Column Header** band and drag it down a small amount. You may also move the GetAddress(2) field on the label down as far as possible. Do this by clicking on the field. Then use the down arrow on your keyboard to move the field down. Make sure the bottom of the field does not go below the Detail band. See Figure 22-37.

Figure 22-37
Label with
Column
Header
moved down



3. If your labels are printing too low on the page, so that the bottoms of the labels are cut off, click on the **Page Header** band and drag it up a small amount. You may also move the **GetAddress(2)** field on the label up as far as possible. Do this by clicking on the field. Then use the up arrow on your keyboard to move the field up. Make sure the top of the field does not go behind the **Column Header** band.

Figure 22-38
Label with Page
Header and
address field
moved up



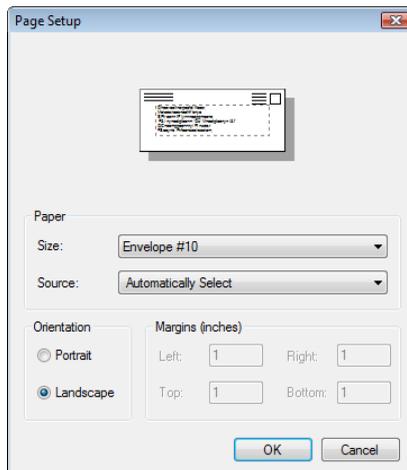
4. Once you have made your modifications, save your changes by going to **File** and **Save**, then **File** and **Close**. Do a test print of your labels by going to **Contact Lists** and printing a page on regular paper, then holding the label paper up to it and see if the label text fits within the labels. If not, go back and make further adjustments. This process can take a few tries to get the labels lined up properly. Once they are set, continue to use the selected Custom Layout for the label.

Adjusting Envelopes for your Printer

Each printer feeds envelopes differently. Using the default envelope setup, you may find that your printer does not properly print envelopes. They may be printed in the wrong direction, or the address prints in the wrong location. An easy way to fix this is to change the paper size within the envelope's report designer.

On the Main Menu, click **Reports**, then click **Contacts**. Highlight the **Contacts Letter Envelope** and click **Custom Layout 1** or **Custom Layout 2**. Then click **Modify Selected Layout**. On the Report Designer screen, click **File** at the top and click **Page Setup**. On the Report Page Setup screen, click the **Page Setup** button. Change your paper size to Envelope #10, or the appropriate size envelope. Your screen may look something like Figure 22-39, although different printers will show different screens. Click **OK**, then **OK** again to close the windows. To save your changes, go to **File** and **Save**, then **File** and **Close**. Once this envelope is set up correctly, continue to use the selected Custom Layout.

Figure 22-39
Page Setup
screen with
Envelope #10
size



NOTE

The Temporary Custody Thank You Letter Envelope and the Accession Thank You Letter Envelope may require adjustments to print properly as well. These forms are also modified in the Main Menu | Reports area of the program.

PRINTING LABELS AND ENVELOPES

The process of printing labels and envelopes is similar to printing letters, as they may be printed either one at a time or for a list of contacts.

PRINT ONE LABEL OR ENVELOPE FROM THE CONTACTS SCREEN

PastPerfect has a special built-in printing feature that allows you to print individual mailing labels when you print a letter from the Contacts screen. This feature allows you to reuse mailing label stock. To print one label or envelope, click the **Print** button at the top of the contact record. You will see the screen in Figure 22-40.

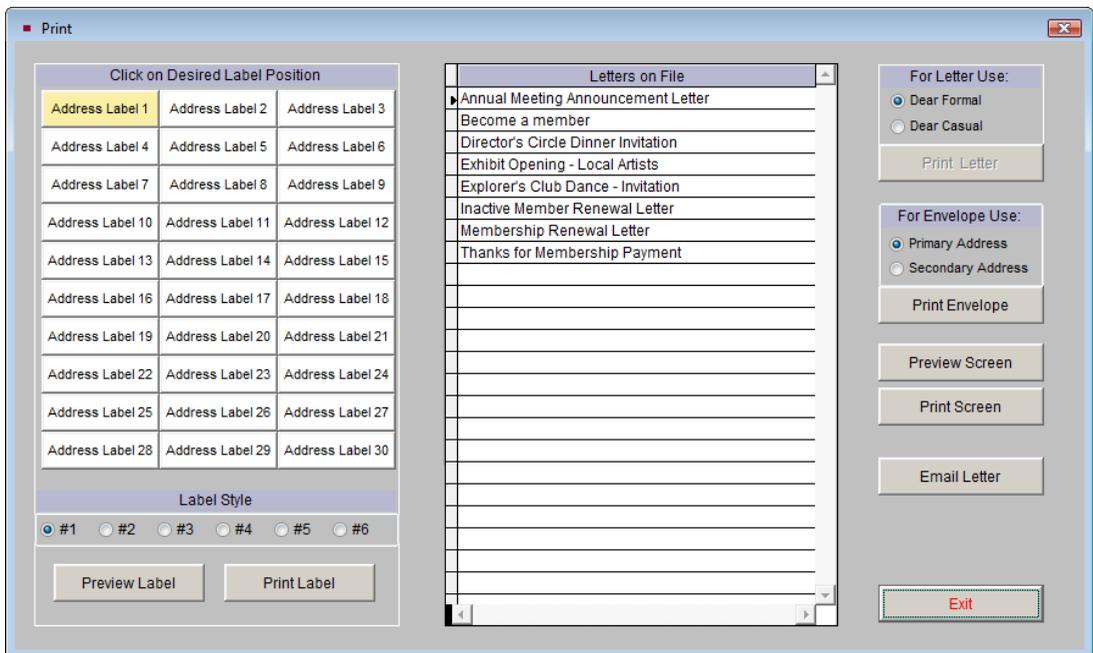


Figure 22-40 Contacts Print screen

The left side of the screen displays a sample label sheet. Simply select the position on the label sheet you want to use by clicking on the position. The printer will print the contact mailing information on that particular label. You may select your Label Style at the bottom of the screen. To preview, click the **Preview Label** button. If you are ready to print, click the **Print Label** button.

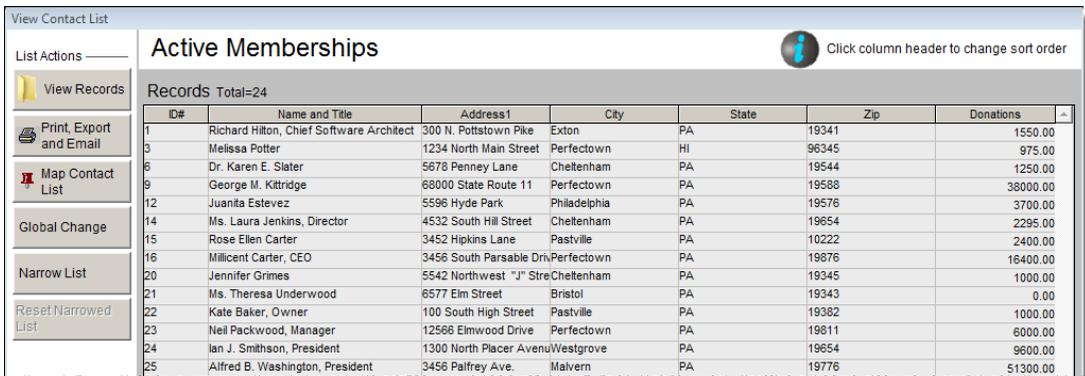
To print an envelope, first choose whether you want the **Primary** or **Secondary Address** used. Then click **Print Envelope** to send it to your printer.

NOTE

The Temporary Custody and Accession Thank You Letter Envelopes are printed one at a time from the Thank You Letter screen in the respective sections.

PRINT LABELS OR ENVELOPES USING A CONTACT LIST

To print labels or envelopes for a list of contacts, select **Contact Lists** from the PastPerfect Main Menu. This will open the Contacts List Manager screen, which shows the User Defined Lists and Fixed Lists. Select the desired list and click **View Selected List** on the Sidebar. You will see the screen in Figure 22-41.



View Contact List

List Actions —

View Records

Print, Export and Email

Map Contact List

Global Change

Narrow List

Reset Narrowed List

Active Memberships

Records Total=24

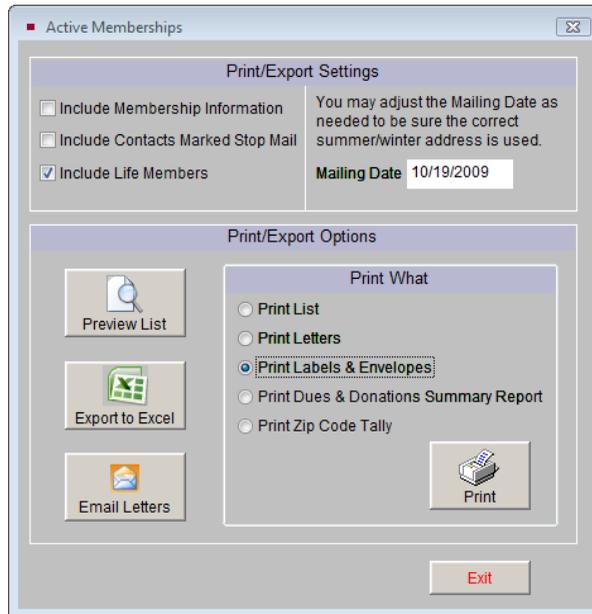
Click column header to change sort order

ID#	Name and Title	Address 1	City	State	Zip	Donations
1	Richard Hilton, Chief Software Architect	300 N. Pottstown Pike	Exton	PA	19341	1550.00
3	Meilissa Potter	1234 North Main Street	Perfectown	HI	96345	975.00
6	Dr. Karen E. Slater	5678 Penney Lane	Cheltenham	PA	19544	1250.00
9	George M. Kittridge	68000 State Route 11	Perfectown	PA	19588	38000.00
12	Juanita Estevez	5596 Hyde Park	Philadelphia	PA	19576	3700.00
14	Ms. Laura Jenkins, Director	4532 South Hill Street	Cheltenham	PA	19654	2295.00
15	Rose Ellen Carter	3452 Hipkins Lane	Pastville	PA	10222	2400.00
16	Millicent Carter, CEO	3456 South Parsable Drive	Perfectown	PA	19876	16400.00
20	Jennifer Grimes	5542 Northwest "J" Street	Cheltenham	PA	19345	1000.00
21	Ms. Theresa Underwood	6577 Elm Street	Bristol	PA	19343	0.00
22	Kate Baker, Owner	100 South High Street	Pastville	PA	19382	1000.00
23	Neil Packwood, Manager	12566 Elmwood Drive	Perfectown	PA	19811	6000.00
24	Ian J. Smithson, President	1300 North Placer Avenue	Westgrove	PA	19654	9600.00
25	Alfred B. Washington, President	3456 Palfrey Ave.	Malvern	PA	19776	51300.00

Figure 22-41 View Contact List screen

You may use the **Narrow List** button to select a specific range of contacts from this list, if you want to narrow the list down further. To continue printing labels or envelopes, click the **Print, Export and Email** button on the Sidebar. This will open the Print/Export screen, seen in Figure 22-42.

Figure 22-42
Print/Export
screen



In the Print/Export Settings area, you may choose to exclude contacts from having labels or envelopes printed for them. To exclude contacts with Stop Mail, do not check the box next to **Include Contacts Marked Stop Mail**. To exclude Life Members, leave the box next to **Include Life Members** empty. Also, if you use primary and secondary addresses, to ensure you have the correct addresses, make sure the date in the **Mailing Date** field is the date you are sending the mailing.

Then in the Print/Export Options section, click the radio button next to **Print Labels & Envelopes**, then click the **Print** button. On the next screen, seen in Figure 22-43, choose your label style or envelope and click either **Preview** or **Print**.

Figure 22-43
Print screen



TIP

If you are using Alternate Billing Addresses, be sure to choose Label Style #4, #5, or #6.

After printing your labels or envelopes, be sure to add the entry to the mailing log so you can track the mailing later.

EMAILS

PastPerfect has the ability to send mass emails to your contacts for whom you have valid email addresses. To make use of this function, your computer must have an internet connection and you must have an active account with an SMTP email server. Your email account settings must be entered on the Setup Email screen, by going to the Main Menu | Setup | Contacts | Email | Email Setup. For more information about setting up your email, please see *Chapter 20 - Contacts*.

COMPOSING EMAILS

Email letters are composed on the Setup Email screen. Go to the Main Menu | Setup | Contacts, then click the **Email** button to bring up the screen in Figure 22-44 where you create your email letters.

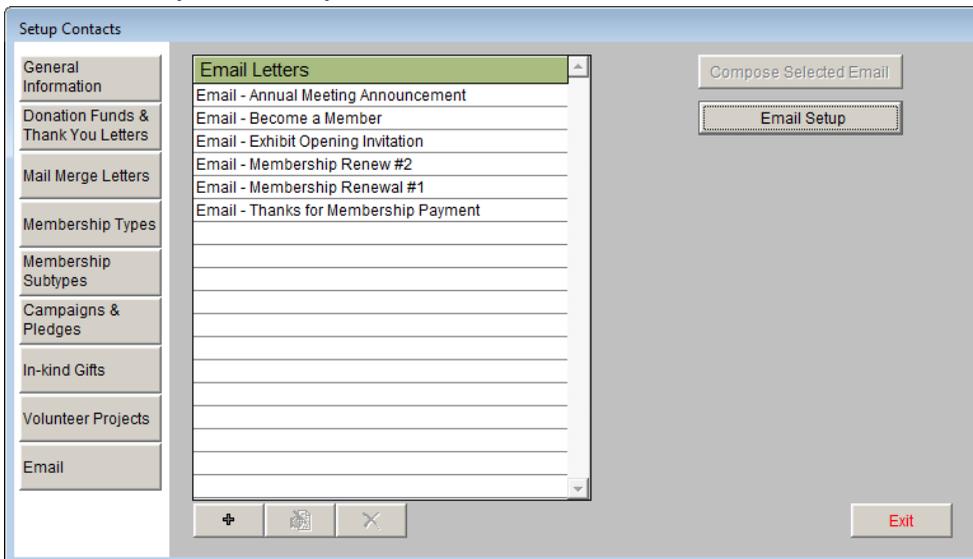


Figure 22-44 Setup Contacts Email screen

To create a new email letter, click the **plus sign** button. Enter a name for the email letter and click **Add**. The new email letter will be added to the list. Highlight the email letter, then click the **Compose Selected Email** button and the **Compose Email Text** screen will appear.

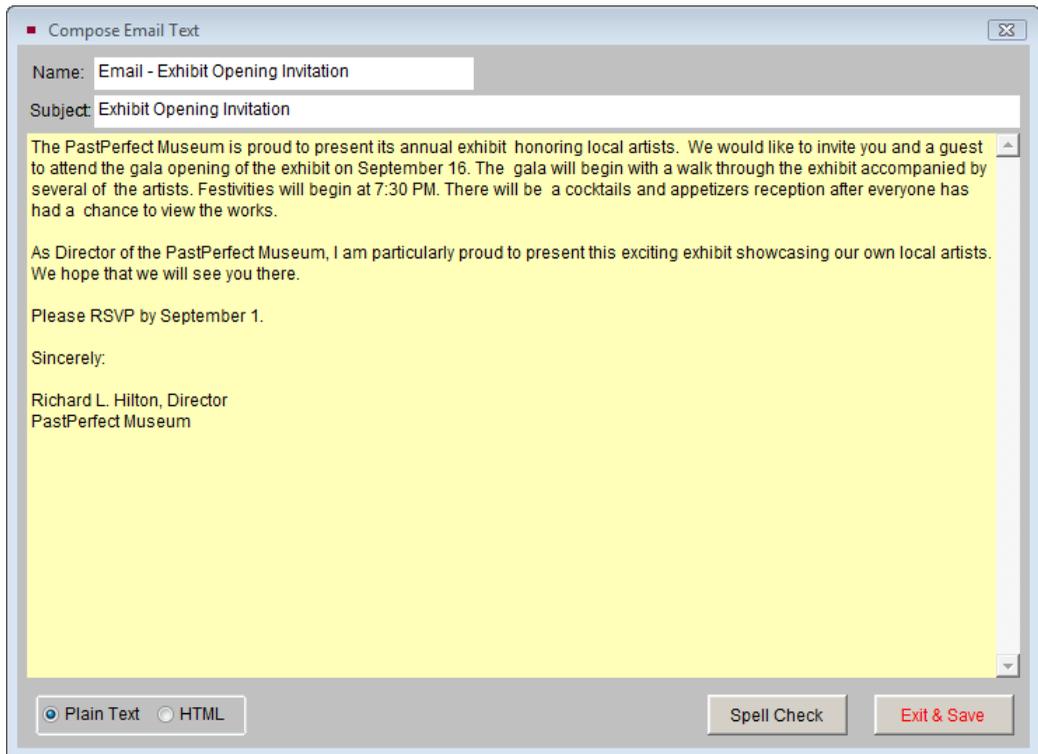


Figure 22-45 Compose Email Text screen

The name of the email letter will appear in the **Name** field at the top of the screen. This is just for your reference; recipients will not see this in their emails. The **Subject** field at the top of the screen is designated as the Subject of the email, which the recipients will see. By default the **Subject** will be filled in with the name of the email letter, so be sure to edit the Subject line appropriately if needed.

You have the option to compose your email in Plain Text format or HTML. Please choose the format for this email before you begin typing the text in the large white field. You do not need to add a “Dear” line to your email text as this can be added later. Attachments to your email, such as MS-Word documents or PDF files, may be inserted once you are ready to send your email to a Contact or a Contact List. Click **Exit & Save** to close the screen. Click **Exit** to close the **Setup Contacts** screen.

SENDING EMAILS

Like Mail Merge letters, labels and envelopes, you may send emails to one contact or to a list of contacts.

Sending One Email from the Contacts Screen

To send an email to just one individual, go to the Contacts screen. Select the contact you wish to email, then click the **Print** button at the top of the screen. On the Print screen, click the **Email Letter** button. Highlight the letter you want on the **Email Letters** list. Select **Dear Formal**, **Dear Casual** or **None** as the greeting to be used, then click **Email Letter**. This will bring up the **Send Email** screen.

Send Email

To Name: Harding Kramer

To Address: hap@museumsoftware.com

CC:

Subject: Exhibit Opening Invitation

Attachment:

Hap,

The PastPerfect Museum is proud to present its annual exhibit honoring local artists. We would like to invite you and a guest to attend the gala opening of the exhibit on September 16. The gala will begin with a walk through the exhibit accompanied by several of the artists. Festivities will begin at 7:30 PM. There will be a cocktails and appetizers reception after everyone has had a chance to view the works.

As Director of the PastPerfect Museum, I am particularly proud to present this exciting exhibit showcasing our own local artists. We hope that we will see you there.

Please RSVP by September 1.

Sincerely,

Richard L. Hilton, Director
PastPerfect Museum

support@museumsoftware.com
Support Desk
PastPerfect Museum

Include Signature Change Signature Plain Text HTML Send Cancel

Figure 22-46 Send Email to one contact

Notice that the **To Name** and **To Address** fields are filled in with data from the contact record. You may add another address in the CC line. If you want to attach a file to this email, you may do so here by clicking the **paper clip** button and locating the file to attach.

If you want to include, not include, or edit the signature line, you can make that change on this screen. Editing the email signature will affect the default email signature for all emails. You may also edit the email if needed. However, keep in mind that changes made to the email text will only change this particular email for this particular contact. The email letter on file remains unchanged.

When you are ready to send the email, click the **Send** button. You will see a message appear telling you if the email was sent successfully or not. You will also have the option to add an entry to the mailing log for this email. It is recommended that you add entries to the mailing log unless they are duplicates or sent for testing purposes.

TIP

If you want to send an individually written email to one contact, click the letter icon next to the email address on the contact record. This email will not be kept on file.

Sending Multiple Emails Using a Contact List

To send a mass email to a list of contacts, select **Contact Lists** from the PastPerfect Main Menu. This will open the **Contact Lists Manager** screen, which shows the User Defined Lists and Fixed Lists. Select the desired list and click **View Selected List** on the Sidebar.

TIP

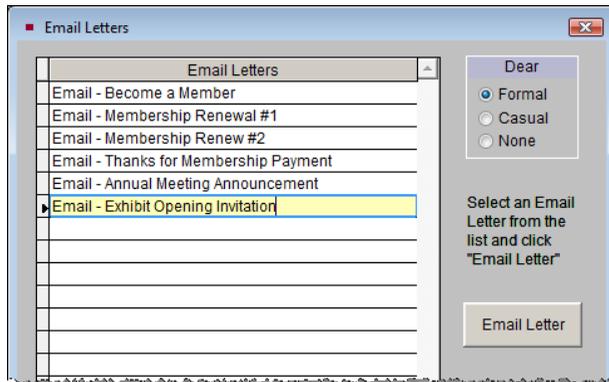
If the list that you are emailing to has contacts without email addresses, you may still use the list. Emails will not be sent to those contacts. You may also create lists of just contacts with email addresses, using the Query builder to include only contacts whose email field is not empty. If you want to send an email to members with email addresses, and send a paper mailing to members without email addresses, you should create two lists. One list will be for members with email and the other list will be for members without email.

On the View Contact List screen, click the **Print, Export and Email** button on the Sidebar to continue.

In the Print/Export Settings area, you may choose to exclude contacts from having an email sent to them. To exclude contacts with Stop Mail, leave the box next to **Include Contacts Marked Stop Mail** empty. To exclude Life Members, leave

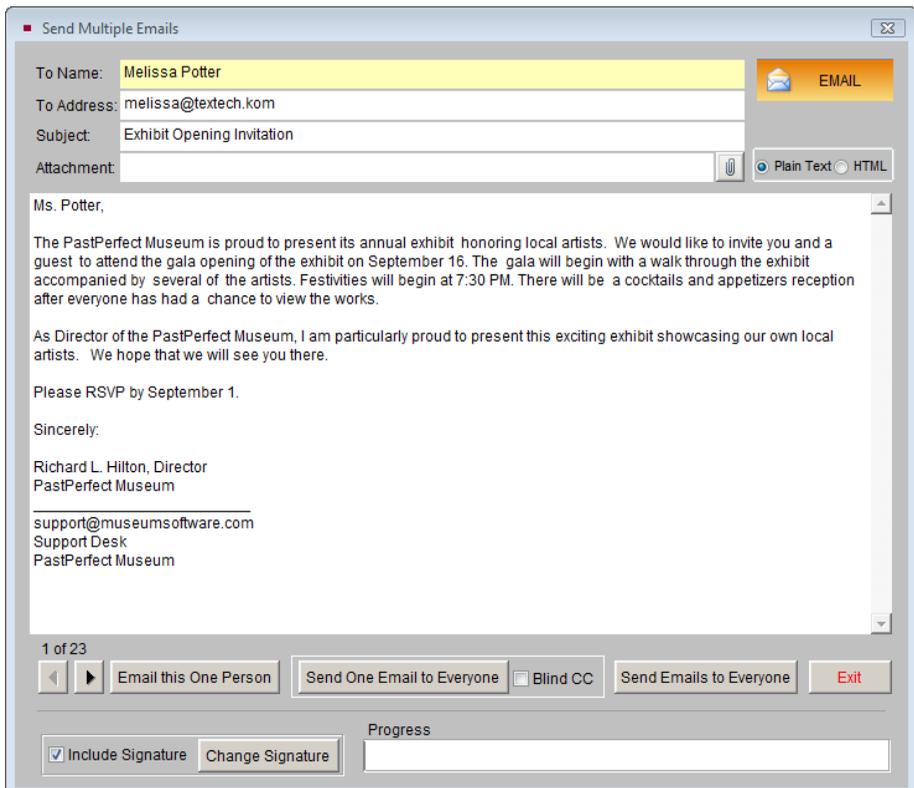
the box next to **Include Life Members** empty. In the Print/Export Options section, click the **Email Letters** button. On the next screen, choose your email letter and Dear style, then click **Email Letter**.

Figure 22-47
Email Letter
selection screen



On the **Send Multiple Emails** screen, you will see an email addressed to the first person on the list.

Figure 22-48
Send Multiple
Emails screen



You may view the emails for the other contacts on the list by clicking the arrow buttons at the bottom of the screen. If you want to attach a file to this email, you may do so here by clicking the **paper clip** button and locating the file to attach. If you want to include, not include, or edit the signature line, you can make that change on this screen. These changes will affect the email sent to all contacts on the list.

You have three options for sending mass emails:

Email this One Person - This option sends the email to the contact shown on the screen. Use the arrow buttons to move to the next contact on the list and click the button again to send an email to that contact. Use this option if you want to send the emails one at a time, or if you want to personalize each email. You may skip over contacts using this option.

Send One Email to Everyone - This option creates one email with all the recipients in the "To" field. If you want to make the recipient list invisible, so that contacts cannot see the email addresses of the other recipients, check the **Blind CC** box. This option is often the fastest way to send out emails. However, if there is an invalid email address on the list, the email may not be sent. We suggest this option be used for lists of 25 or less recipients when you want to be able to respond to each other. If you make changes to the text of the email letter for the first recipient when using this option, that modified text will be sent to all recipients. Changes made on other email recipients' screens will be ignored.

NOTE

An invalid email address is one that contains a space, does not have an @ symbol, or does not have a proper extension such as ".com." An email address can be incorrect but still have a valid format.

Send Emails to Everyone - This option creates a separate email for each contact on the list. Contacts will not see the recipient list in the "To" field of the email. This option may take longer to send emails, since it requires a separate email for each contact. However, if there is an invalid email address on the list, you will be able to skip over it and continue sending to the rest of the list. If you make changes to the text of the email letter when using this option, it will affect only the email sent to the recipient on whose email you made the change.

Once you choose an email option, the Progress bar will begin to move, indicating that the emails are being sent. Depending on the number of emails you are sending, this process may take a few minutes.

NOTE

Your email provider or antivirus software may have limitations on the number of emails you may send in a period of time. These limitations are set to prevent spam. You may need to contact your email service provider to see what the limits are, or temporarily turn off your outgoing email virus scanning. To avoid going over these limits, break up your email list into multiple lists and avoid attaching large files to your email.

After sending your emails, be sure to add the entry to the mailing log, so you can track the mailing later.