



Bulk Mailing Wizard tutorial

Introduction

CharityMaster uses Microsoft Word to create mass mailings. This tutorial assumes that you have a good knowledge of how to use Word.

In order to generate a mail merge, you must first create a merge template. When the template has been created, then use the Bulk Mailing Wizard to create the list of recipients and generate the mailing.

CharityMaster ships with two variations of general mail merge templates:

- The “General merge” template which only fills in the name, address and salutation of each recipient.
- The “Fundraising Previous Donors” template which also fills in the total amount(s) previously donated and the time frame during which the amount(s) were donated. (You will specify the time frame when creating the mail merge.)

Word templates

To create a Word mail merge template, select the **Setup** tab on the ribbon then click **Word templates** then **Mail merge templates**.

On the **Maintain merge templates** screen, you can either modify one of the existing templates or you can add a new template by clicking the **Create template** button. If you add a new template, you must select either “General” or “Prev Donor letter” on the **Create new merge template** screen. When you create a new template, CharityMaster will simply copy the default template that ships with CharityMaster and make it available for editing under the new template file name you specified.

You can modify the template page layout (margins, etc.), headers and footers, default font, styles, etc.

When editing templates, be absolutely sure not to change or delete any of the merge fields.

Using the Bulk Mailing Wizard

Introduction

Open the **Bulk Mailing Wizard** by selecting the **Outputs** tab on the ribbon then click **Bulk Mailing Wizard**. Start by selecting / creating the list of recipients, selecting the template you want to use and then create and print the resulting letters.

The Wizard can produce the following:

- A Word mail merge
- Labels for each letter
- A listing of all the names to which the letters will be sent and
- An Excel spreadsheet containing all of the names to which the letters were sent.

Selecting / creating the list of recipients

The available pre-defined mailing lists are organized into groups which include: Volunteers, Fundraising, etc. Select the group then select the mailing list you want to use.

If you have already set up a “Custom Filter,” select the General group of listings and then select Custom List. You can also create or modify a Custom Filter by clicking on the **Set custom filter** button on the Wizard screen.

When you select one of the pre-defined lists, additional options may appear. Click on the **Help button** to see the help topic for the report that corresponds to the selected letter.

- **Category.** Select the **name category** you want to include.
- **Membership categories.** Some mailings require that you select the category/ies of memberships that are to be included. Click on the list to select each of the categories you want.
- **Sponsorship types.** Some mailings require that you select the category/ies of sponsorships that are to be included. Click on the list to select each of the categories you want.
- **Date range.** For some letters, you must specify the date range for the data to be included in the letters. Both the start date (the earliest date) and the end date must be specified. When you select the current or previous fiscal year, the start and end dates are determined based on the fiscal year end month set on the **System options** screen. If you select Custom, you must use the calendar button to the right of each date to select the date.
- **Flags.** Some mailings require that you select up to three flags to be used in selecting the recipients of the mailing. To select the flags, you can either double click on the **Flags** field or click on the **Select Flags** button. When you do this, either the **Set prospect / communication flags** screen or the **Set volunteer preference flag** screen will appear depending on the mailing list you have selected.
- **Amount limits.** Select the upper and lower dollar limits. To be selected for this list, the donor's total donations must be greater than or equal to the lower limit and less than or equal to the higher limit for the date range specified.
- **Committee / activity.** For some volunteer module reports, you must specify a committee or activity.
- **Exclude members of households.** If this option is available and the option is checked, letters and labels will be generated only for the “head” of each household.
- **E-mail option.** Elect to INCLUDE or EXCLUDE people where the database has a valid e-mail address. To reduce mailing costs, you may wish to e-mail those who have e-mail addresses and send a letter to the balance.

As you select each report and set the limiting parameters and output options, the number of letters / labels / names field will be updated.

Output options

Whenever you produce a mail merge or a set of labels using the Bulk Mailing Wizard, CharityMaster will

warn you if there are any addresses with solicitation restrictions. (The Solicitation restriction is sent on the **Maintain names** screen.) If you receive this warning, display a name listing which will highlight the names with any sort of restriction. You can then investigate each name and decide whether or not to include each restricted name in your mailing.

Name listing

There are two reports available:

- a listing of all of the names included in the mailing (*excluding those with missing or incomplete addresses*) and
- a listing of those that would otherwise qualify to be included in the mailing except that they have a missing or incomplete address. Use this report to help you make as many address corrections as possible before you send out the mailing.

For some lists, you have the choice of several different formats for the name listing.

Mailing labels

CharityMaster has the ability to print on a variety of Avery mailing labels. You must select the type of label to use on the **User Options** screen.

Note that a mailing label is not produced if the addressee has a missing or incomplete address.

When you print labels, you are asked how many blank labels you want to “skip.” This will allow you to start printing your labels on a partially used sheet of Avery labels.

Mail merge

Note that CharityMaster does NOT control the printing of Word documents. You must use Word's printing options to control the printer, tray options, etc.

1. Start by selecting a template to use. Note that you can only select a template of the appropriate type for the mailing list that you have selected. (See above for details on the two types of templates that can be used.)
2. If necessary, *double click* on the name of the letter to edit the template. When you have finished editing the template *be sure to save it*. Close Word before taking the next step.
3. Click on the **Create** button to produce the letters/documents. Print the letters and then close Word. It is not necessary to save the file with all of the merged letters since you can easily recreate the mail merge..

Excel spreadsheet

When you create an Excel spreadsheet, *all* names will be included – even those with solicitation restrictions are missing / incomplete addresses.

When you click the **Create** button, CharityMaster will ask you to specify a file name and location where the Excel spreadsheet will be saved.

Communications history

CharityMaster allows you to keep a record of all contacts (letters, e-mails and telephone calls sent and received) that you have had with each name in the database. After you have generated a mail merge, CharityMaster will ask if you want to add a record of the mailing to each name that was included in the mailing. If you decide to add the history of the mailing to the database, you must enter the purpose of the mailing on the **Mailing detail** screen. This makes the history more informative.

A listing of all communications with the currently selected name will appear when you click **Communications history** on the **Maintain names** tab.

Let's practice

This exercise will have you produce a Bulk Mailing without actually printing anything.

- Click the **Setup** tab on the ribbon then click **Word templates** then **Mail merge templates**.
- Click the **Create Template** button.
- Select the “general” template type in the yellow drop down field.
- Enter “Tutorial” in the **Name of letter** field.
- Enter “Tutorial.dot” in the **Template file name** field.
- Click **Save**.
- On the **Maintain merge templates** screen, double click “Tutorial.dot” to open the new template for editing.
- Type (or copy and paste) the following text as a new paragraph before the “Sincerely” closing:

This paragraph was inserted to show how easy it is to create new mail merge templates or edit existing ones.

- Save the revised Word template and close Word.
- Click the **Outputs** tab and then **Bulk Mailing Wizard**.
- Select the “General” group and then select “Custom Mailing List.” You will probably get a message that says “No existing filter.” If you wish you can click the **Set custom filter** button and enter the parameters for a custom filter or you can proceed on the basis that all names in your database will be included.
- Select the following Output Options:
 - “Name listing”
 - Format: “Names & addresses- alphabetical”
 - Name listing options: “Names with invalid addresses”
- Click the **Print** button. If there any names with missing or incomplete addresses, they will be listed on your screen.
- Close the report by clicking the **Close** button on the ribbon.
- Under Output Options, select “Merge letters.”
- In the **Template selected** drop down box select the “Tutorial” template.
- Click the **Create** button and Word will open with the mail merge all done.
- Do a quick review of the letters to see that the merge is complete then close Word. (Elect “Don’t save” when prompted by Word.)
- Respond “No” when prompted to save the communications history.
- Return to the **Maintain merge templates** screen.
- Select the “Tutorial.dot” template then click the **Delete template** button to delete the template you created for this tutorial.

We hope you enjoyed this tutorial. All of this information is also available in the **CharityMaster help system**. Press the **F1** key on any screen to get the information you need.