

How do I create a mail-merge letter to send to a group of contacts?

Version 4.0

PastPerfect has a built-in mail-merge program where you can compose your letter and insert fields. When you print your letters for a group of people, the fields you chose will be automatically filled in with the contact's information, like name, address, and membership information. Here's how:

1. On the main menu, click Setup, then click Contacts. Click the tab for Mail-Merge letters.
2. If you are just getting started with letters, you can set up a Default letter that will have just the information you want for all letters, like your logo, date, and contact address information at the top, and your signature at the bottom. This Default letter should only contain things you want for all letters, so you do not want to compose the body of your letter here. When you create a new letter, this is the information that will automatically show up, so you don't have to keep adding the same information each time you make a new letter.
3. To start the Default letter, click the "Setup Default letter" button. You can include fields (such as name, address, fund, or amount) by going to the drop down list that says "Select Field from list" at the top of the screen and selecting the field you want to include. Then click on your letter where you want the field inserted, and click the Insert Field button. The field will be inserted into your letter. You only want to enter images, text, and fields on this letter that you want to appear on ALL letters. You do not want to compose the body of the letter here. When your default letter is set up, click Save, then click Exit.

Please note that this default letter is only available for any NEW letters that you add after you set up this default letter. This default letter is not pulled into your existing Mail-Merge letters.

4. To create a specific letter, such as a Membership renewal letter, click the Setup button on the Main Menu and then click Contacts. Click on the Mail-Merge letters tab. Click Add, and enter the name of your new letter, then click Ok. Make sure your new letter is highlighted and click on Compose Letter. You will see your Default Letter show up. You can then add other fields or customize your letter as needed for this letter. For example, you can insert fields for Membership type and Dues Amount to let your members know they can renew their specific membership type for the designated amount. When you are done, click Save and Exit.
5. To print your letter for a group of people, go to Lists & Labels on the main menu. Click on the list you want, such as "Memberships Overdue". Then click Continue. Choose your Sort By option on the top right. Click the Print Letters button at the bottom left corner. Pick your letter from the drop-down list at the top right. Select either "Dear formal" or "Dear casual" at the top.

Please note that on this Print Letter screen, you will not see the fields you inserted get filled in with the contact information. It is only when you click "Print all letters" or "Print

selected letters” that the letters will print, and have the proper information filled in for the inserted fields. If you want to test one letter, click “Print selected letters” and choose to print a range of letters, from 1 to 1. This will just print the first letter.

6. Once you click to print the letters, you will have the option to add this mailing to the Mailing Log. If you want to track who you sent letters to and when, click Yes for this option.

If you have any questions, please contact our Support Office at (800)562-6080. Thank you for using PastPerfect!