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.

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.
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**
To create a default Pledge Thank You Letter or Pledge Payment Reminder Letter, click the **Campaigns & Pledges** button on the Sidebar to see Figure 22-4.

![Figure 22-4 Campaigns & Pledges screen](image)

To create a default In-kind Gift Letter, click the **In-kind Gifts** button on the Sidebar.

![Figure 22-5 In-kind Gifts screen](image)
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.

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.
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

Use the **Link to File** option to avoid problems with backups becoming too large.

Use the Insert tab and Picture button to add your image.
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.

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.

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.
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.
Figure 22-13 Setup Collections, Accessions Screen View

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](image)
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.

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.
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.
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.
In-kind Gift Letters are printed after posting an in-kind donation to thank the donor for the gift. The default letter is the same letter that is printed for all in-kind gifts. Please see the section earlier in this chapter for creating default letters.

COLLECTIONS LETTERS

The Temporary Custody Thank You Letter is printed after entering a Temporary Custody receipt. It acknowledges the receipt of the items and gives the donor information about the decision making process and care of his or her items. The letter is composed and printed from the Temporary Custody screen by clicking the Thank You Letter button on the Sidebar, seen in Figure 22-21. This will open MS-Word. If you have created a default letter, you will see it here. If you have made changes on the default letter and you want to use the modified default here, or you have edited the Temporary Custody record, click the Rebuild Letter button to overwrite your existing letter and pull in those changes. You may compose the rest of your letter using the MS-Word Toolbar as explained in the sections earlier in this chapter.
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.
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.
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.

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.
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.
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 2 5/8”.
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 2½”.

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 3½”.

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 2½”.

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 2½”.

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 2½”.

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.
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.

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 22-28 Label Designer screen

Figure 22-29
Label with shortened address box
3. 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](image)
**Label with “ab” button**

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

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

![Figure 22-31](image)
**Report Expression screen**

5. 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.
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.

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.
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.

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.
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.
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.

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.

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](image)

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.

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**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.

![Figure 22-41 View Contact List screen](image)

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.
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.
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.

![Setup Contacts Email screen](image)

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.

![Compose Email Text screen](image)

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.

![Figure 22-46 Send Email to one contact](image)

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.