

## **How do I create Mail Merge letters?**

Version 4.0

Mail Merge letters are general mailings to your members, potential members, and other contacts. These letters encompass most mailings you may send, except for donation and pledge thank you letters or pledge reminder letters.

Mail Merge letters can be printed for groups of contacts from the Lists & Labels screen. They may also be printed for an individual contact by clicking the Print button in the Navigation Bar at the top of a contact record.

### **Creating a Default Mail Merge Letter**

1. From the Main Menu, go to Setup | Contacts | Mail-merge Letters.
2. Click "Setup Default Letter".
3. Using PastPerfect's WordRite interface, add the information and fields you want to appear on all letters, like your institution's logo, footer information, signature lines, and mail merge fields for the recipient's name and address. The letter 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.
4. To insert a field, place your cursor in the letter where you want the field to appear. Next, select the field name from the drop down list at the top of the screen, then click the "Insert field" button. The field will appear on your letter in angle brackets < >.
5. Once you've made your changes, click "Save". Click "OK" to confirm. Then click "Exit".

### **Creating a new Mail Merge Letter**

1. From the Main Menu, go to Setup | Contacts | Mail-merge Letters.
2. Click the "Add" button and type the name of the letter and click "OK". The letter name will be added to the list of letters.
3. Click the letter name and then click "Compose Letter".
4. If you have set up a default letter, you will see that when the WordRite interface opens, saving you time from having to insert the same information and fields on the new letter.
6. Compose your letter. To insert a field, place your cursor in the letter where you want the field to appear. Next, select the field name from the drop down list at the top of the screen, then click the "Insert field" button. The field will appear on your letter in angle brackets < >.
7. Once you've made your changes, click "Save". Click "OK" to confirm. Then click "Exit".

If you have any questions, please contact our Support Office at 1-800-562-6080 or email [support@museumsoftware.com](mailto:support@museumsoftware.com). Thank you for using PastPerfect!