

How do I create a household mailing?

Your goal is to send a mailing to a group of constituencies and you want both constituents on one row, not individual. Constituent mailings is one per person

Go to Mailings

Choose Household Mailings

set up the OPTIONS for mailing filters. You will filter as needed depending on who the mailing is for.

Normally, check off to include do not publish fields and check off Anonymous. You

Next is the query for WHO you want to export.

Go to the constituents to display query and click the magnifying glass to the right to get to the query list. Find your query or Create a new query to work with.

Now that options and query are chosen you are ready to build the merge file.

Go to the build merge file tab (at top of window)

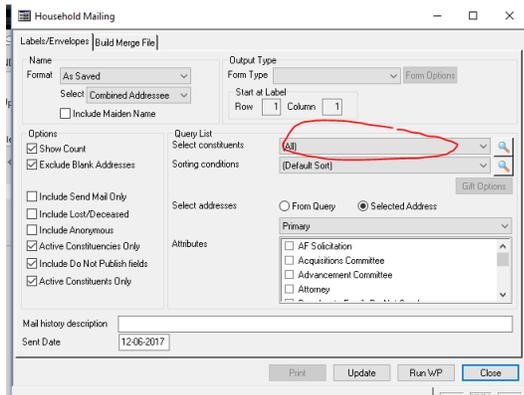
click build (at bottom of window) and confirm count that you see pop up.

You will now get to the save window (choose where you want it saved)

Name the export and at the end of the filename *type .csv* to save in a fake excel format for easy review.

Review spreadsheet to confirm you are seeing who you expected.

EXPLANATION OF OPTIONS:



Show count. Defaults to checked off. You will see the count before it saves.

Exclude Blank Addresses. Defaults to checked off. No address will be ignored.

Include Do Not Publish fields. Defaults to unchecked. Within the applications, on the address tab, there are do not publish checkboxes for pieces of the address or a global don't publish ANY of this address. This is for Directory purposes. We always suggest you check this box off during exports and mailings (unless you are doing the directory type projects where it should not show). This will populate the address info you need for your mailing.

Include Send Mail Only. Defaults checked off. On address tab is the send mail box. This says whether someone wants to get mail (checked) or not get mail (if unchecked).

Include Lost/Deceased. Defaults to unchecked. Automatically exclude lost or deceased

Include Anonymous. Defaults to unchecked. anonymous donor they are ignored

Active Constituencies Only. Defaults to checked off. If there are inactive constituencies (on the name tab you can put a from and to date for constituencies) they are ignored

Active Constituent Only. Defaults to checked off. Will be excluded if inactive on info tab