

Create Personalized Letters / Mail Merge

<i>Speech</i>	<i>Cursor Actions</i>
Mail Merge allows you to merge data from the Sumac database into a template to create personalized letters. This command is available in many list windows in Sumac.	
For this example, we'll run a mail merge from Contact List.	Show console. Click Contacts.
Mail Merge requires the use of a template. If you don't have a template, watch the Create Template video before getting started. Let's assume you have a template saved on the desktop. Remember, when using a template, test it first to make sure everything works properly.	Expand Mailings. Hover over Mail Merge.
Select the records for which to create personalized documents,	Select a bunch of contacts from the contact list.
then click Mail Merge.	Click Mail Merge. Click Selected.
Sumac prompts you to choose your template.	Click Desktop. Choose template: Thank You Letter.
Next choose whether you want to merge the results to a single output file, which saves one file containing all the merged documents	Point to Merge results to a single output file.
or create an output file for each of your personalized letters.	Point to Create 6 output files.
We'll choose merge to a single file because it's easier for printing. If you were going to email the documents, then you would want individual output files for each letter.	Point to Merge results to a single output file.
Confirm,	Click OK.
and then tell Sumac where to save this file.	Choose Desktop.
Note that Sumac proposes a name for the file. It consists of the year, month, day, hour, minute and second, followed by the range of contact ID numbers in the file. You can, of course, change the file name.	Point to file name.

<p>When you click OK, Sumac does the mail merge operation, generating and saving a document for your letters. The actual mail merge operation usually takes a fraction of a second, but it may take a bit longer, depending on the speed of your connection to the database.</p> <p>Next, Sumac asks if you want to save a communication record for each contact that you included in the mail merge. This is very important: whenever you are doing a mail merge, you intend to communicate, so you should record the communication in the Sumac database.</p>	<p>Click Save. Show Prompt window.</p>
<p>Click yes.</p>	<p>Click Yes.</p>
<p>Specify the details of the communication record – perhaps this is a thank you letter so choose that as the communication type.</p>	<p>Choose communication type: Thank-You.</p>
<p>The date may be a couple of days from now, since we need to stuff and stamp the envelopes.</p>	<p>Set the date.</p>
<p>When you click OK, a communication record is attached to each of the contacts.</p>	<p>Click OK. Expand contact record.</p>
<p>Now we can open the file and see all of the personalized letters. You can print them.</p>	<p>Go to desktop. Minimize Sumac. Open file. Scroll through letters.</p>
<p>Then use Sumac to print envelopes or mailing labels.</p>	<p>Open Sumac. Click Contacts. Expand Mailings. Hove over Labels/Envelopes.</p>
<p><i>Check out more training videos to learn more about Sumac.</i></p>	