Bluebird Postal Mailings

Senate Technology Services
Helpline: 518-455-2011

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Mailings

This class will show how to generate postal mailings using the contact records in Bluebird.

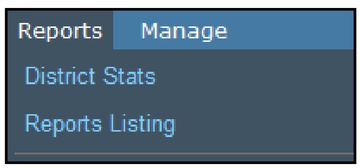
The three basic steps to produce a mailing are:

- **Searching**: Selecting the desired records from Bluebird.
- **Exporting**: Saving the Bluebird search criteria as a CSV file.
- **Merging**: Using Microsoft Word to create Letters, Envelopes and/or Labels.

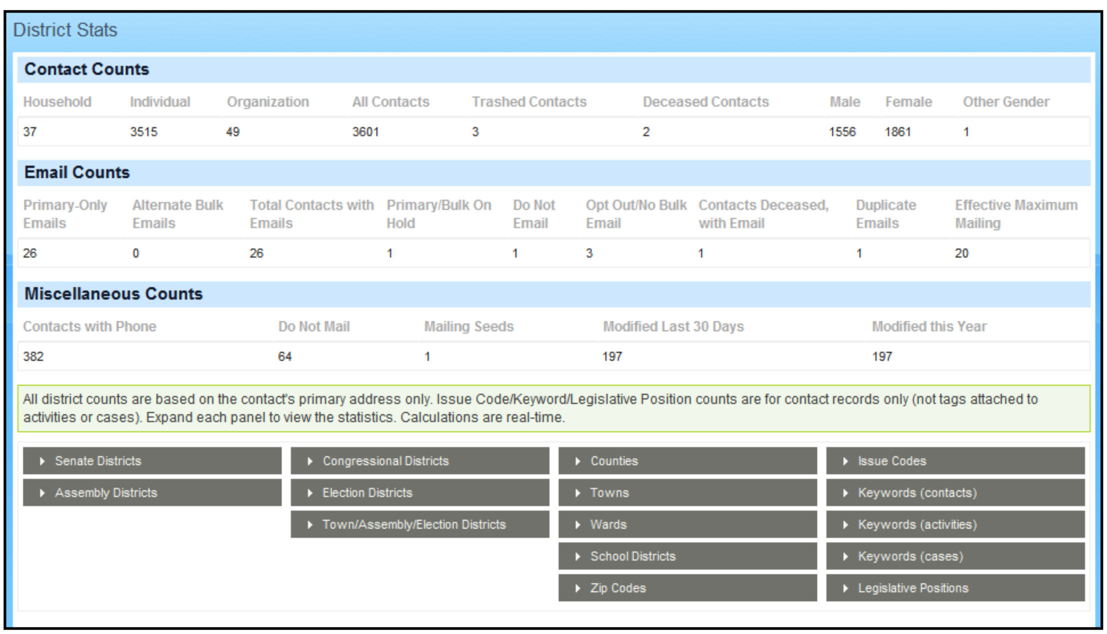
District Stats

This view provides statistics for fields within Bluebird, viewing this information is helpful to determine approximately how many contacts you may be targeting for a specific mailing.

1. From the main navigation area, click **Reports**, and then click **District Stats**.



2. Click the **arrow next to the desired option** to view the statistics.



Groups

Understanding Groups

Groups are used to collect and organize records. Within Bluebird, you can create either Static Groups or Smart Groups.

- **Static Groups** provide a way for you to organize contacts that might not have similar criteria. In this case, you will need to look up each contact record to add to a specific static group.

  For example, you might want to keep track of principles within a school district. You would create a static group and then manually add contacts to the static group you created. This can be done through the contact's Groups tab or from the Manage menu on the main navigation area.

- **Smart Groups** provide a way for you to organize your records by criteria. Smart Groups are created after running a search, where the search criteria create the rules for the group. Saving a smart group does not save the records in the result list; it saves whatever criteria you defined in the search. That means every time you view the smart group you are pulling an updated list of contacts who meet that criteria.

  For example, if you searched for all female constituents in Albany, you could save that search for future use and title it Albany Women Smart Group. If another staff person enters a new contact that is female and lives in Albany, she would appear in the Albany Women Smart Group results the next time it is run because she meets the criteria.

Working with Static Groups

Creating a Static Group from the Create Menu

1. From the main navigation area, click the **Create** menu, click **New Group**.
2. Type a **name for** the group.
3. If desired, type a **description**. *Note: a group's description only shows up on the Manage Group screen.*
4. If planning to send a mass email to this group **check** the **email list** box.
5. If desired, choose a **Parent Group**.
6. Click **Continue**.

Creating a Static Group from a Search

1. Search the database to find the **desired common** records.
2. In the search result window, click **All** or **Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)
3. After selecting the desired records, click **actions**, then click **Group** - **add contacts.**
4. Click radio button in front of **Create New Group**.
5. In the Group Name box, type a **name** for the group.
6. If desired, type a **description**. *Note: a group's description only shows up on the Manage Group screen.*
7. If planning to send a mass email to this group **check** the **email list** box.
8. If desired, choose a **Parent Group**.
9. Click on **Add to Group**.

Adding a Single Contact to a Static Group

1. Search the database to find the desired **Contact record** you want to add to the static group.
2. From the contact record view screen, click the **Groups tab**.
3. Click **Add to a group** and click the **desired group**.
4. Click **Add.**

You will now see the Group listed in the Contact Record's Groups tab under Regular Groups.

Adding Multiple Contacts to a Static Group

1. Search the database to find all of the desired **Contact records** you want to add to the static group.
2. Select the **desired records** and then click **Actions**.
3. Click **Group - add contacts**.
4. Make sure the radio button is for **Add Contacts to Existing Group** is selected.
5. Click the **down arrow** across from Select Group and then click on the **desired group**.
6. Click **Add to Group.**

Editing a Static Group

1. From the main navigation area, click on the **Manage menu**, and then click **Manage Groups**.
2. Click on **more**, across from the Group that you would like to edit.
3. When you click on **more**, a menu will appear that gives you three options: **Settings**, **Disable**, or **Delete**, click on **Settings**.
4. Make **desired changes**.
5. When done, click **Save**. A message pop up box will appear to let you know the Group has been saved.

Removing a Contact from a Static Group

1. Search the database to find the desired **Contact record** you want to remove from the static group.

2. From the contact record view screen, click on the **Groups tab**.

3. Click **Remove** across from the Group you want to remove.

When someone has been removed from a Group, they are not deleted. Instead, they are placed into a Past Groups section on the contact record's Groups tab. They can be added back by clicking **Rejoin Group**.

Disabling a Static Group

1. From the main navigation area, click on the **Manage menu** and then click **Manage Groups.**

2. When the list of Groups appears, click **More** across from the Group you want to disable.

3. Click **Disable** from the menu. Click **OK** at the prompt.

The Disabled group will appear in a lighter font shade (see Guilderland Central School District below).

The next time you return to the Manage Groups screen, you will **not** be able to view disabled groups until you apply the check mark next to Disable in the upper right hand corner.

Note: To Enable an Inactive Group: click on the **Manage menu**, then click on **Manage Groups**, remove the check mark from Enable and apply the check mark for Disable, click **Search**. Then across from the Group, click **More**, **Enable**, click **OK** at the prompt.

Deleting a Static Group

1. From the main navigation area, click on the **Manage menu** and then click **Manage Groups.**

2. When the list of Groups appears, click **More** across from the Group you want to delete.

3. Click **Delete** from the menu.

4. Click **Delete Group**. The message popup box will indicate that the Group has been deleted.

Adding Staff Members to the Email Seeds Static Group

To add one person at time:

1. Search the database to find the **office staff record** you want to add to this group.
2. While looking at the record of the office staff member, click on the **Groups** tab.
3. Click the **dropdown arrow** across from Add to a group and click **Email Seeds** from the list.
4. Click **Add.** This contact is now added into this group.

To bulk add

1. Click in the Find Contacts search box type **%@nysenate.gov** (This will narrow down your search to help find staff records.)
2. Press **Enter**.
3. In the search result window, click **All** or **Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)
4. After selecting the desired records, click **Actions**, then click **Group - Add Contacts**.
5. Across from Select Group, click the down arrow and choose **Email Seeds**.
6. Click **Add to Group**.
7. A message will appear at the top of the screen to let you know how many contacts were added to the Group.

Working with Smart Groups

Creating a Smart Group

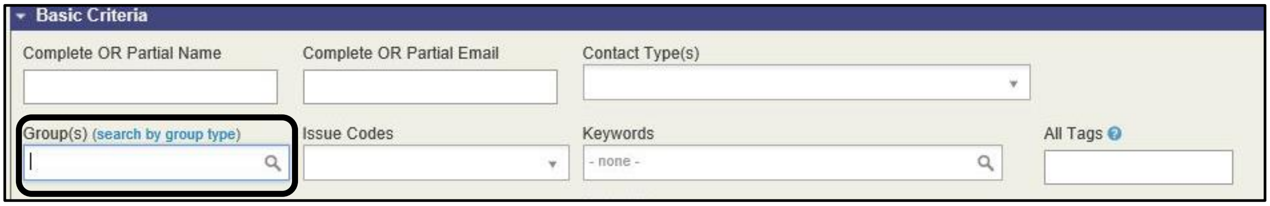
1. Search the database to find the **desired common** records.

> **Note**: The Find Anything, Find Cases, and Find Activities search options will not allow you to create a group from your search results.

2. In the search result window, click **All** or **Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)
3. Click **Actions**, then click **Group – create smart group.**
4. Type a **name** for the Smart Group. (**Tip**: When you create a new Smart Group, it will appear in the listings with the Static Groups. Therefore, when viewing the list of groups, there is no way to determine what type of group it is. When entering the name of a Smart Group you might want to put a notation of Smart Group within the name.)
5. If desired, enter in a description.
6. If planning to send a mass email to this group **check** the **email list** box.
7. Click **Save Smart Group**.
8. A message will display in the message area that the Smart Group has been created. Click **Done**.

Viewing a List of Contacts in a Smart Group

1. From the main navigation area, click **Advanced Search**.
2. Under the Basic Criteria section, click the **dropdown arrow** under Groups.



3. Click the **desired Group**.
4. Click **Search** to display a list of names.

Editing a Smart Group Name, Description or Email List status

1. From the main navigation area, click **Manage**, and then click **Manage Groups**.
2. Click on **More**, across from the Group that you would like to edit.
3. When you click on **More**, a menu will appear that gives you three options: **Settings**, **Disable**, or **Delete**; click on **Settings**.
4. Make **desired changes**. When done, click **Save**. A message pop up box will appear to let you know the Group has been saved.

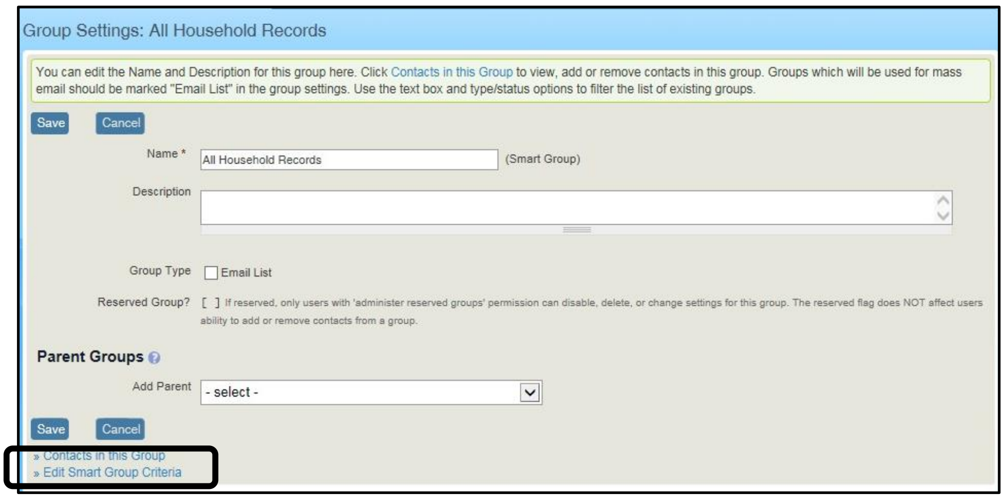
Editing Smart Group Criteria

1. From the main navigation area, click on the **Manage menu**, and then click **Manage Groups**.

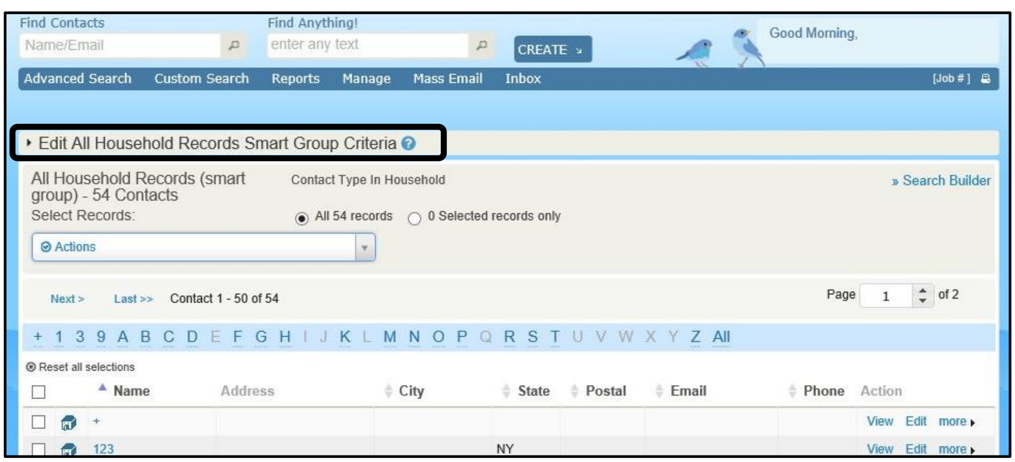
2. Click on the **More** link, across from the Smart Group that you would like to edit.

3. When you click on the **More** link, a menu will appear that gives you three options: Settings, Disable, or Delete; click on **Settings**.

4. On the Group Edit Screen, click on **Edit Smart Group Criteria** in the bottom left of that box

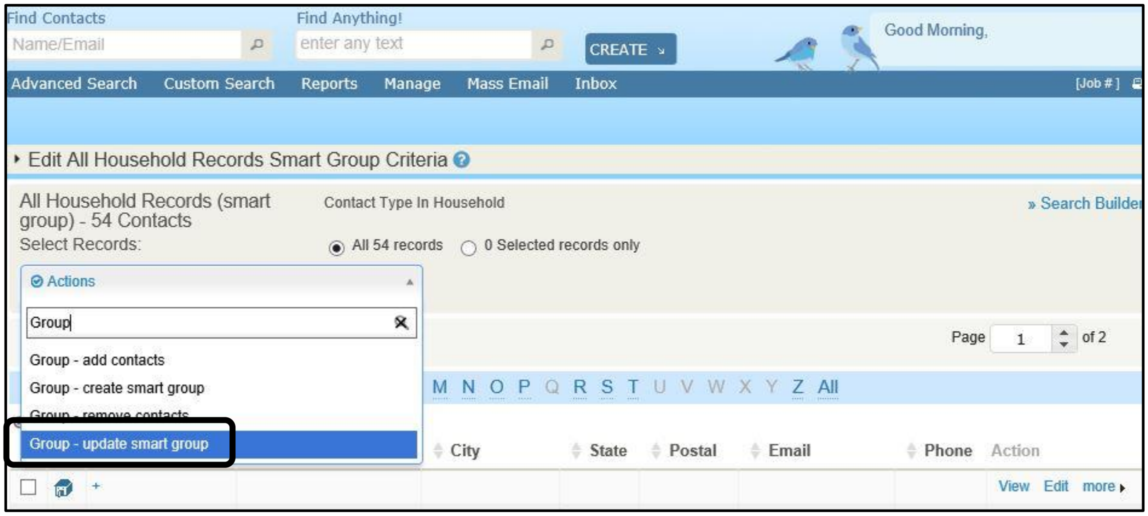


5. On the next screen, you will see the Advanced Search results for the Smart Group that you are viewing. Click on the expandable panel titled **Edit [Group Name] Smart Group Criteria** at the top of the screen. This will open the Advanced Search panel.

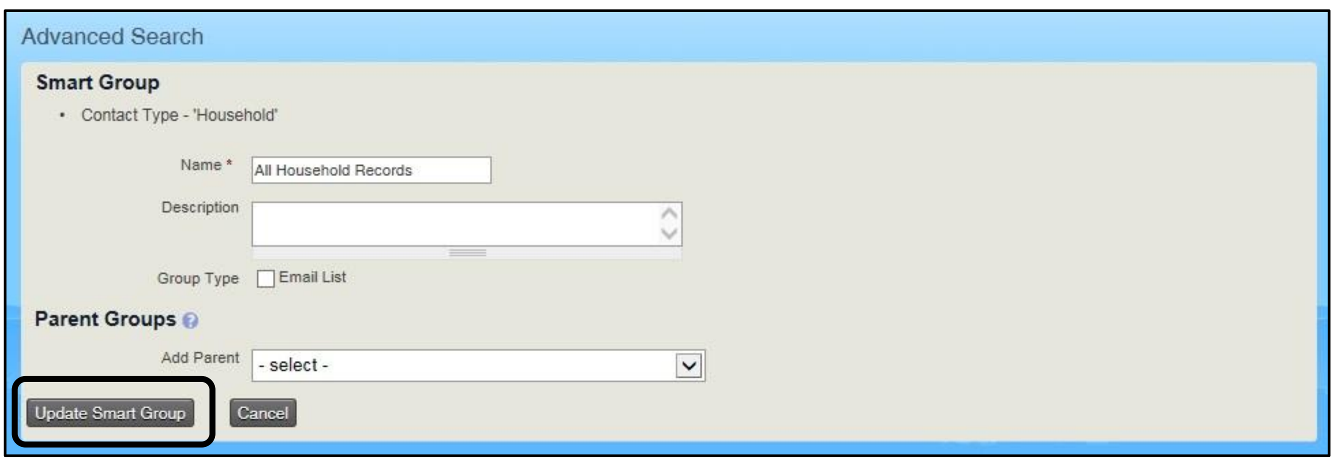


6. Make adjustments needed to the Advanced Search criteria and then click **Search**.

7. The screen will refresh with an updated view of the Advanced Search results page, select the radio button for All # records, click in the Actions box and in the white box that appears, type **Group**. In the filtered list select **Group - update smart group**.



8. On the Smart Group page, select **Update Smart Group** button in the bottom corner of the screen.

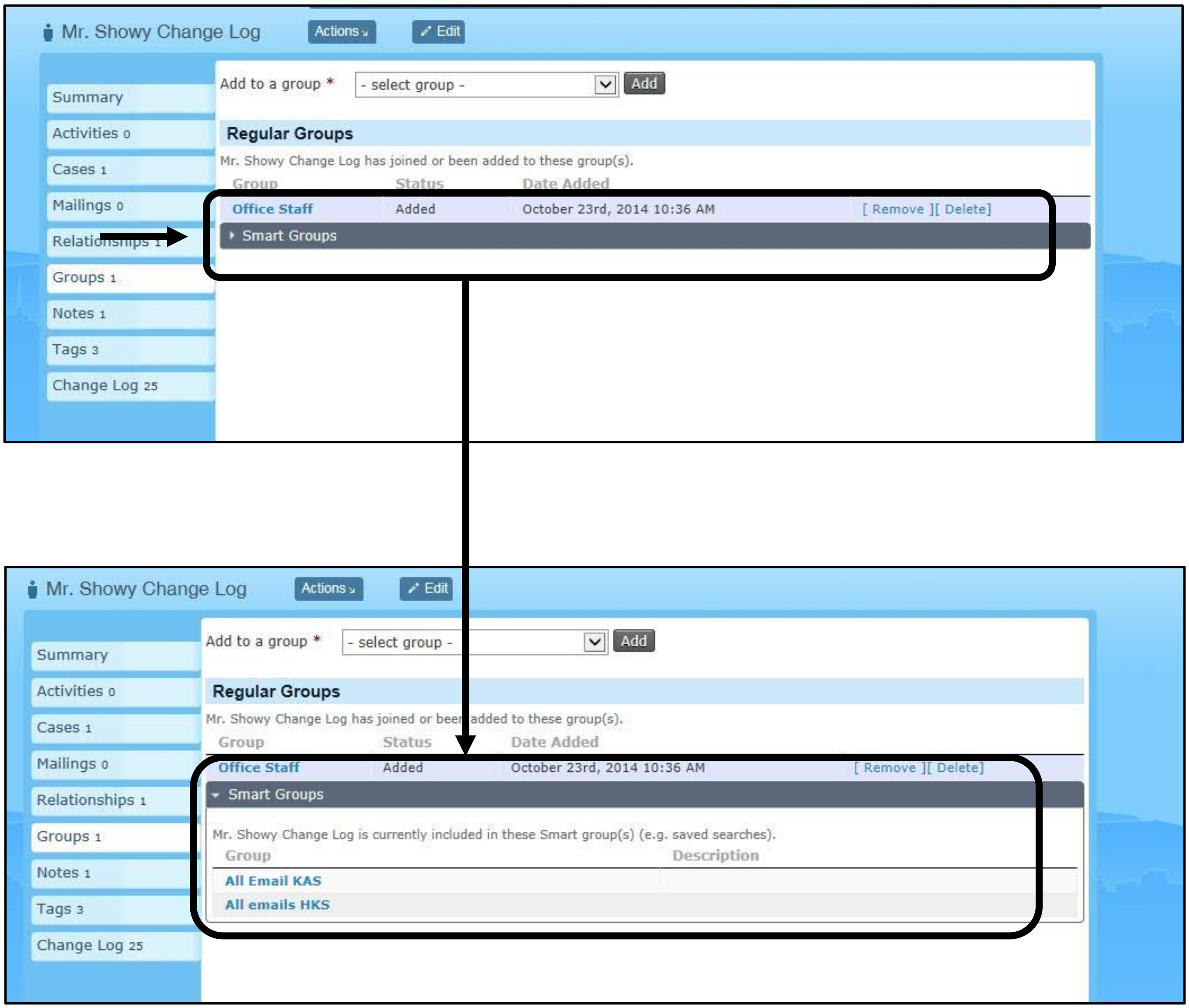


9. You will see the button change to Processing, and then a message popup box will tell you the Smart Group has been saved. On the next page, click **Done**.

10. This will bring you back to the Edit Advanced Search criteria page. You can click **Dashboard** to clear this page.

Wondering if a contact is in a specific Smart Group?

Go to the desired **Contact** record and click on the **Groups** tab. On the Groups screen, you will see an expandable panel titled **Smart Groups**. Expand this panel by clicking on the **triangle** to the left of Smart Groups. The panel will expand and show all Smart Groups that the contact currently meets.



Advanced Search

General Information

Advanced Search is used to search for virtually any information available in the database. By default, Advanced Search will retain the search criteria after you run a search.

- Clicking the **Advanced Search button** expands the search interface, where you will notice the search options are sorted by panels.

- When you select an option from any of the dropdown choices, it will appear below the dropdown in a running list. Click **x** to remove it as a selection or choose more options from the dropdown to build on your search criteria.

- Several text fields will let you set multiple criteria by entering the values separated by a comma (i.e. zip code search – 12303, 12306, and 12309).

- You may use the percent symbol (**%**) as a **wildcard** for free form text fields. The wildcard may be used before, after, or in the middle, of search text.

- When conducting an advanced search, the default **Display Results As** drop down is set to Contacts, however, you can adjust this to search for other criteria. This provides additional search options than the Find Activities or Find Cases search screens under Custom Search.

- To clear the criteria, click the **Reset Form** button on the screen. This will reload the form with all previous criteria removed.

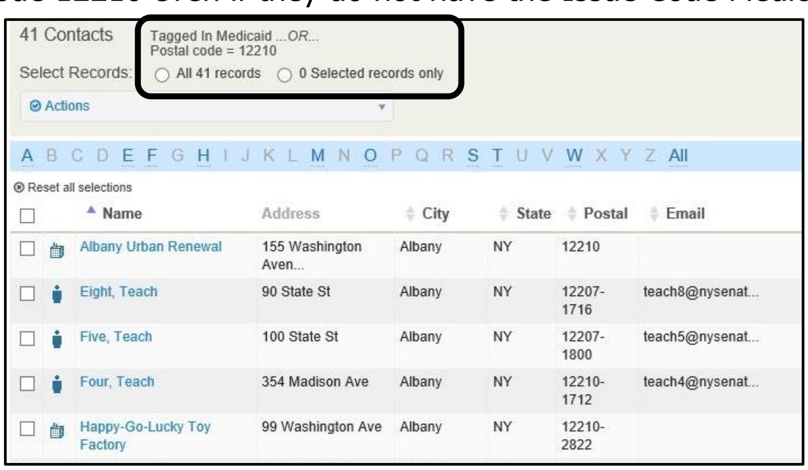
- **Search Operator field** allows you to be more or less restrictive with your searches.

For *more restrictive searches*, use the **AND** operator, see example below.

By selecting **AND** under Search Operator**, Medicaid** under Issue Code(s), and typing **12210** in the Postal Code field the result will show all contacts with the Issue Code Medicaid who live in Zip Code 12210.

For *less restrictive searches*, use the **OR** operator, see example below.

By selecting **OR** under Search Operator, **Medicaid** under Issue Code(s), and typing **12210** in the Zip Code field the result will show contact with the issue code Aging no matter what zip code they live in plus anyone who lives in Zip Code 12210 even if they do not have the Issue Code Medicaid.



Conducting an Advanced Search

1. Click **Advanced Search**.
2. Fill out **desired criteria**.
3. Click the **Search** button to display the search results list.

Note: When viewing a search result, you are seeing ALL names listed in alphabetical order. If you click a different letter from the Search result listing, you have just changed the filter of your search result. To view the entire list again, click on the All link.

Searching for Deleted Contact Records in Trash

You may search through the Trash to view contact records that have been deleted but not permanently removed from the system. The Office Administrator has the ability to permanently delete a contact record.

1. Click **Advanced Search**.
2. Under the Search Settings panel click the **check box,** titled **Search in Trash** (deleted contacts).
3. Fill out any **additional fields** you would like to search on (i.e. last name of contact)
4. Click the **Search** button to display the search results list.
5. Under the **actions** drop down menu at the top of the screen select **Restore contacts from trash**.

Note: Other fields can be included in a Trash search (i.e. last name).

Searching a Single Zip Code

1. Click **Advanced Search** or click **Refresh Form** if already in Advanced Search, this will clear out any fields that are selected to give you a blank search screen.

2. Open the Address Fields Panel, click in the **Postal Code field** and type the **desired postal code**.

3. Click the **Search** button.

Searching for Tags

1. Click **Advanced Search** or click **Refresh Form** if already in Advanced Search, this will clear out any fields that are selected to give you a blank search screen.

2. Perform one or more of the following:

    - Issue Codes – click in the Issue Codes box and either type in desired Issue Code or scroll to find desired Issue Code, you may select more than one Issue Code

    - Positions – click in the Positions box and begin typing the **desired positions text**. When the drop down list appears, click the correct entry from the list. (If necessary, repeat this step until all desired Positions are selected.)

    - Keywords - click in the Keywords box and begin typing the **desired keyword text**. When the drop down list appears, click the correct entry from the list. (If necessary, repeat this step until all desired Keywords are selected.)

3. Click the **Search** button.

> **Note**: Remember, if you select multiple Tags, the search will retrieve records that match **any** of the choices within those selections. Therefore, the search results will include **everyone** who might has at least one of the Tags, NOT just individual who have ALL tags that were selected.

Searching for a Single Zip code with Tags

1. Click **Advanced Search** or click **Refresh Form** if already in Advanced Search, this will clear out any fields that are selected to give you a blank search screen.

2. Click in the Postal Code field and type the **desired zip code**.

3. Perform one or more of the following:

    - Issue Codes: click in the Issue Code field and then type in **desired Issue Code** or **select Issue Code from the list**. (If necessary, repeat this step until all desired Issue Codes are selected.)

    - Positions: click in the Positions box and begin typing the **desired positions text**. When the drop down list appears, click the correct entry from the list. (If necessary, repeat this step until all desired Positions are selected.)

    - Keywords: click in the Keywords box and begin typing the **desired keyword text**. When the drop down list appears, click the correct entry from the list. (If necessary, repeat this step until all desired Keywords are selected.)

4. Click the **Search** button.

Searching for Groups

1. Click **Advanced Search** or click **Refresh Form** if already in Advanced Search, this will clear out any fields that are selected to give you a blank search screen.

2. Click the Groups field and then click the **desired group**. (If necessary, repeat this step until all desired Groups are selected. If you search multiple groups, be aware that this type of search uses the OR logic. Contacts in this group OR this group.)

3. Click the **Search** button.

> **Note**: Remember, if you select multiple Groups, the search will retrieve records that match **any** of the groups within the selection. Therefore, the search results will include **everyone** from both Groups, NOT just records that **appear the in multiple groups.**

Searching by Gender

1. Click **Advanced Search** or click **Refresh Form** if already in Advanced Search, this will clear out any fields that are selected to give you a blank search screen.
2. Open the **Demographics panel** and then click the **desired gender** option.
3. Click the **Search** button.

Searching by Gender within a Single Zip Code

1. Click **Advanced Search** or click **Refresh Form** if already in Advanced Search, this will clear out any fields that are selected to give you a blank search screen.
2. Click in the **Postal Code field** and type the **desired postal code**.
3. Open the **Demographics panel** and then click the **desired gender** option.
4. Click the **Search** button.

Searching by Street Address

One common place to use the % sign is within the street address field. For example, you might put **%State%St%** to find all address with State in the value. (It is recommended to use the wildcard in place of typing out text such as Street, Avenue, Place etc. When the USPS verifies records, they are sometimes abbreviated into St, Ave and Pl. Since a Street Address search uses "strict" logic, (meaning it has to find the EXACT match), your selection might be off because it will not find certain records.

1. Click **Advanced Search** or click **Refresh Form** if already in Advanced Search, this will clear out any fields that are selected to give you a blank search screen.
2. Click in the **Street Address** field and type the **desired address**.
3. Click the **Search** button.

Searching by City

1. Click **Advanced Search** or click **Refresh Form** if already in Advanced Search, this will clear out any fields that are selected to give you a blank search screen.

2. Click in the **City** field and type the **desired city**.

3. Click the **Search** button.

Searching by District Information

Before searching for District Information, you need to make sure you have the correct coding for the field you want to search. For example, all counties are given a numeric code, you can only search for a County based on the numeric code it is given. If you want to search on a specific field within District Information and you do not have the code list, call the Help Line (ext. 2011) to request the list.

1. Click **Advanced Search** or click **Refresh Form** if already in Advanced Search, this will clear out any fields that are selected to give you a blank search screen.

2. Open the Address Fields panel, click in the **desired District Information** field and type the **desired data**. (To search multiple district information, add a comma between the data. i.e. 25, 26, 27)

3. Click the **Search** button.

Searching by Birth Date Ranges and Gender

This option is used when wanting to search for people within a specific birth date range. There is another search option in this manual that describes how to search birthday by month.

1. Click **Advanced Search** or click **Refresh Form** if already in Advanced Search, this will clear out any fields that are selected to give you a blank search screen.

2. Open the **Demographics panel**. Click in the **Birth Dates** field and select **Choose Date Range**, click in the **From** field and select the **desired date**. Click in the **To** field and select the **desired date**.

3. Within the **Demographics area,** click the **desired gender** option.

4. Click the **Search** button.

Searching for Employees of an Organization

Sometimes you might want to send a letter to all employees of an Organization. To do so, perform the following steps:

1. Click **Advanced Search** or click **Refresh Form** if already in Advanced Search, this will clear out any fields that are selected to give you a blank search screen.

2. Open the **Relationships panel**. Click the **drop down arrow** under Relationships Type and select **Employee of** from the list provided.

3. In the Target Contact box, type the name of the **Organization**.

4. Click the **Search** button.

Custom Search Menu

Find Cases

This search allows you to find any Cases by using the following search options:

- Constituent Name or Email
- Case Start/End Dates
- Case Type
- Status
- Case Keywords

Find Activities

This search allows you to find any Activities by using the following search options:

- Name or Email of the Contact (With), Employee Assigned to (Assigned To), or Employee who added the Activity (Added By)
- Type
- Dates
- If the Activity had a Follow-up Activity
- Subject
- Status
- Details
- Priority
- Keywords
- Place of Inquiry
- Activity Category
- Website Survey Name

Find Anything Search

This is a link into the Find Anything search screen, for more information see section titled **Find Anything** within this manual.

Proximity Search

This search is helpful to find records residing in the same postal code. You can search for records within a radius of a specific address or for Tags and Groups within a certain postal code or city. Follow the steps below to perform a Proximity Search.

1. Click **Custom Search** menu, then click **Proximity Search**.
2. Fill in **desired information**. For the best results fill in the Street Address field. If using only the Postal Code field the search will be based off of the middle of the postal code.
3. Click the **Search** button.

Birthday Search

This search allows you to find records that share the same birthday, birth year, or age. You can also search for records within a certain birth month. Follow the steps below to perform a Birthday Search.

1. Click **Custom Search** menu, then click **Birthday Search**.
2. Fill in **desired information**.
3. Click the **Search** button.

Include/Exclude Search

This search allows you to include or exclude certain groups from your results. A common reason for this type of search is if you want to do a district wide constituent postal mailing but would like to exclude all of the members of the press that you may have added to your Bluebird database. If you have previously labeled these contact records with the Press & Media Contacts Individual Category and then created a Group based off this selection, you will be able to exclude them from the mailing by performing the following steps:

1. Click **Custom Search** menu, then click **Include/Exclude Search**.
2. From the Include/Exclude fields, select the **desired Group/Tag**. If you need to remove an option, click the X next to the selected Group or Tag.

> **Note**: This type of search uses the **AND** logic by default, uncheck the check box if you want to make it an **OR** search.

3. Click the **Search** button.

Tag/Group Changelog Search

This search allows you to find any Tag or Group that was Added or Removed/Disabled to a record on a certain date. You can also narrow this down by who altered the record.

1. Click **Custom Search** menu, then click **Tag/Group Changelog Search**.
2. Fill in **desired information**.
3. Click the **Search** button.

Tag Count Search

Use this search to generate counts for Tags based on date ranges for when the contacts were tagged. *Note: the only choice on the results screen of this search is to Export to CSV.*

1. Click **Custom Search** menu, then click **Tag Count Search**.
2. Fill in **desired information**.
3. Click the **Search** button.

Web Activity Search

You can search contact website activity records from the nysenate.gov website. You can search contact name, date range, and type of website activity.

1. Click **Custom Search** menu, then click **Web Activity Search**.
2. Fill in **desired information**.
3. Click the **Search** button.

Tag Demographic Search

You can search a Tag based on a demographic, like age. *Note: the only choice on the results screen of this search is to Export to CSV.*

1. Click **Custom Search** menu, then click **Tag Demographic Search**.
2. Fill in **desired information**.

Click the **Search** button.

Exporting Records

You can export records for various reasons. For instance, you might want to create a CSV file, which you can work with in Microsoft Excel, or you may want to use the exported list to create a mail merge within Microsoft Word.

When exporting lists, you have several options of selecting the fields that you want to export:

- **Export PRIMARY fields**: Provides the most commonly used data values. This includes primary address information, preferred phone, and email. Select this option and click Continue to immediately generate and save the export file. *(Note: this option provides about 65 columns in an excel document.)*

- **Select fields for export**: Allows you to export multiple specific locations (Home, Work, etc.) as well as custom data. You can also save your selections as a field mapping so you can use it again later. There are three types of field mappings that are already created for each office: **Standard Export**, **Basic Export**, and **Email List Export**.

Export Using the Export Primary Fields Option

1. In the search result window, click **All or Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)

2. Click **Actions** and then click **Export Contacts.**

3. From the Selected Fields box select **Export PRIMARY fields**.

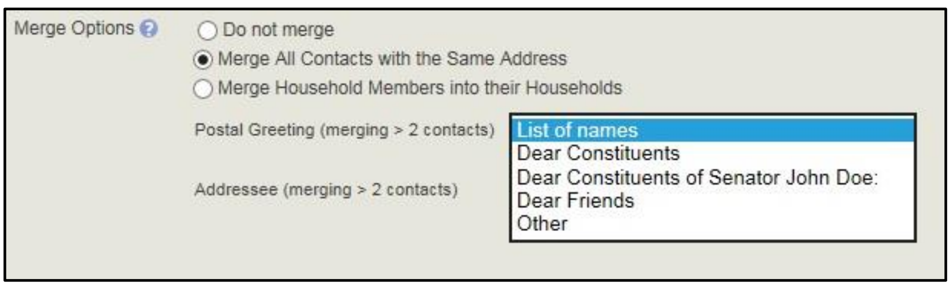
4. If desired, select any additional export options.

Merge Options

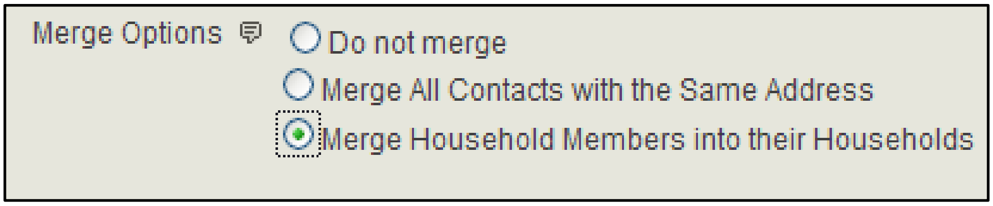
- *Do not Merge:* Use this option to avoid merging records when exporting.

- *Merge Contacts with the Same Address:* This option will combine any records having the same address (street address, city, postal code) into a single record. If a household record already exists in which multiple individuals share an address, the household will be exported as the combined record. If no household record exists, the records will be combined and the Addressee field will list the contact names, comma-separated.

  Note: If you select this option, you will be given the choice of how you want the Postal Greeting and Addressee fields to appear in the mailing.



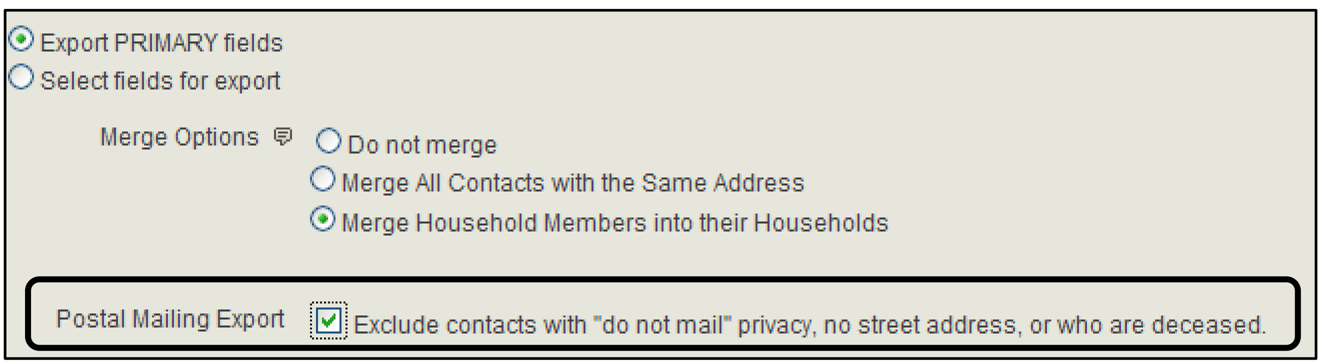
- *Merge Household Members in their Households:* This option will export the household record for any contacts sharing a household address. Bluebird addresses the letters with whatever Postal Greeting option was selected in the Household record.



Note: To view Household records in your Bluebird database, go to **Advanced Search** and in the Basic Criteria section, click the **Contact Types** drop down menu to select **Households**. Click **Search** to view the results.

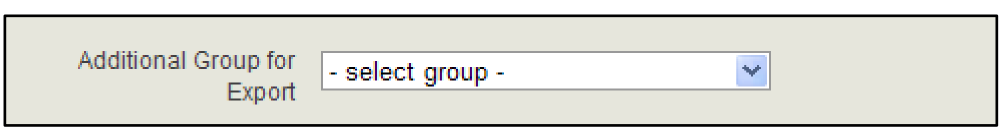
Postal Mailing Exclusions – IMPORTANT

In order to exclude contact records that have the "do not mail" privacy setting selected, have no street address data in their record, or who are marked as deceased be sure to check off the **Postal Mailing Export** option on the export screen.



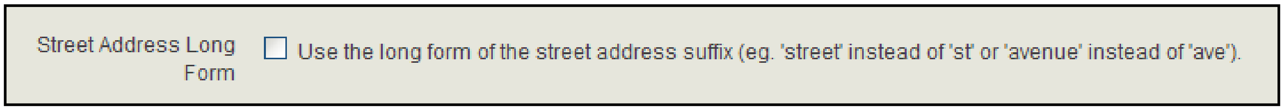
Additional Group for Export

This option is available for you to select an additional group to mail to such as your Mailing Seeds group. Click the **drop down** and select the **desired group**.



Street Address Long Form

Select this option to display addresses in long form (i.e. Street instead of St. or Avenue instead of Ave.)



5. Click **Export**. At the File Download box, click **Save As** to save the file or **Open** to open the CSV file.

6. If you clicked **Save As**. The Save As dialog box will appear. Select the desired location and name the file. (Do not change the Save as Type in this window.)

7. Click **Save**.

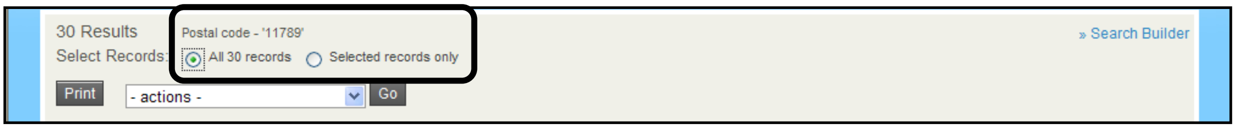
8. At the download complete dialog box either click **Open** to open the saved file or click **on the X** to close out of this box and continue working in Bluebird.

9. After the Download Complete dialog box is closed, you will still be on the export screen within Bluebird. Click **Back** to return to your search results. From here, you can Record a Letter (outgoing) Activity for all of these contacts. (See steps in this manual titled **Bulk Adding an Activity to Multiple Contact Records.**) You can also **Tag** these records if necessary from the actions drop down menu.

10. If you are done working with this list, click the **Dashboard** button.

Export Using the Select Fields for Export Option

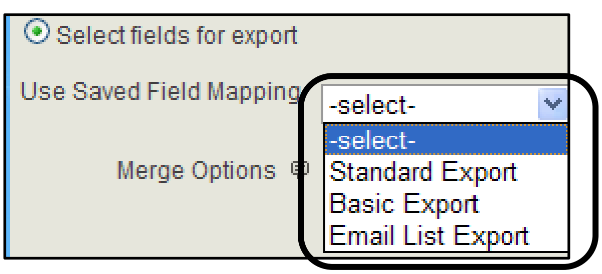
1. In the search result window, click **All or Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)



2. After selecting the records, click the **down arrow** across from actions and then click **Export Contacts.** Click **Go**.

3. From the Selected Fields box, choose **Select fields for export**.

4. Once you click the Select Fields for export option, the Use Saved Field Mapping box becomes available. Click the **drop down arrow** and then click the **desired choice**.



Standard Export: This option will provide the primary fields of Internal Contact ID, the Contact Type, Display Name, First Name, Middle Name, Last Name, Suffix, Job Title, Current Employer, Birth Date, Street Address, Mailing Address, City, State, Postal Code, Postal Code Suffix, Addressee, Postal Greeting, District Information (SD, AD, ED, and CD), Website, Phone, and Email for all Individuals, Organizations, and Households in your search results.

Basic Export: This option will provide the primary fields of Internal Contact ID, Contact Type, Display Name, First Name, Middle Name, Last Name, Job Title, Current Employer, Building, Street Address, Mailing Address, City, State, Postal Code, Postal Code Suffix, Addressee, and Postal Greeting of all Individuals, Organizations, and Households in your search results.

Email List Export: This option will provide the primary fields for Internal Contact ID, First Name, Last Name, Display Name, Email Greeting, and Email Address for all Individuals and Households in your search results.

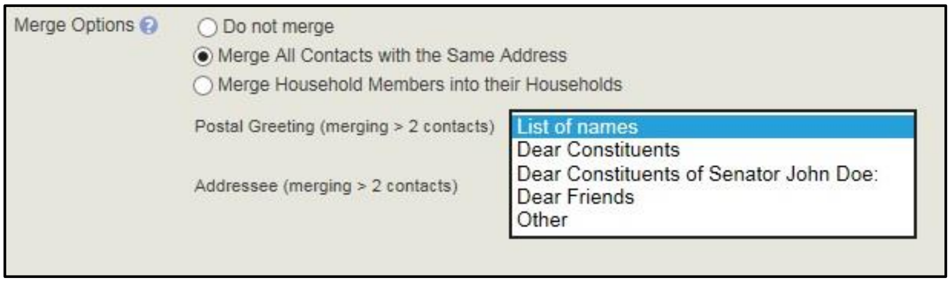
5. If desired, select any additional export options:

Merge Options

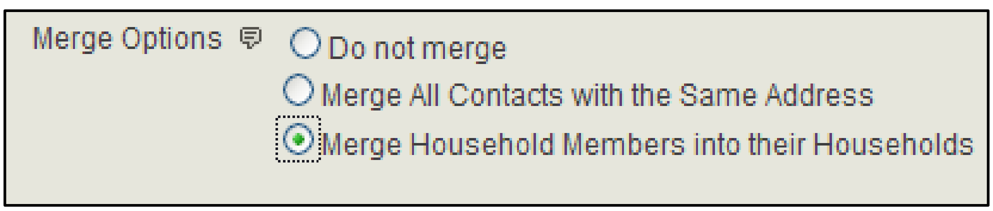
- *Do not Merge:* Use this option to avoid merging records when exporting.

- *Merge Contacts with the Same Address:* This option will combine any records having the same address (street address, city, postal code) into a single record. If a household record already exists in which multiple individuals share an address, the household will be exported as the combined record. If no household record exists, the records will be combined and the Addressee field will list the contact names, comma-separated.

Note: If you select this option, you will be given the choice of how you want the Postal Greeting and Addressee fields to appear in the mailing.



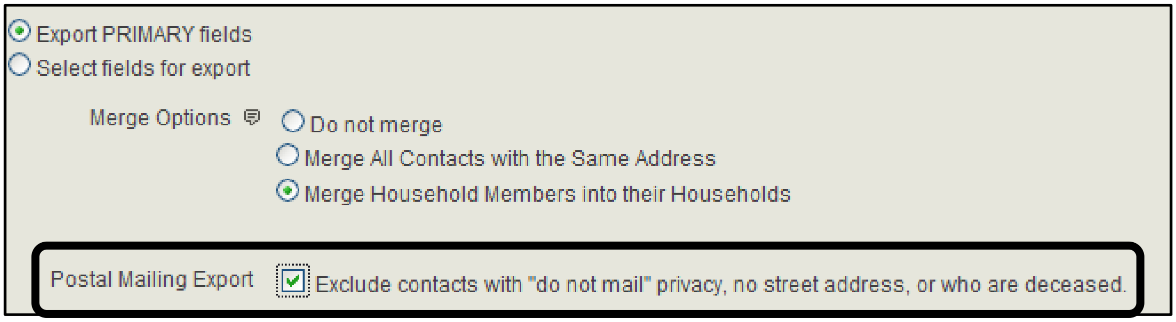
- *Merge Household Members in their Households:* This option will export the household record for any contacts sharing a household address. Bluebird addresses the letters with whatever Postal Greeting option was selected in the Household record.



Note: To view Household records in your Bluebird database, go to **Advanced Search** and in the Basic Criteria section, click the **Contact Types** drop down menu to select **Households**. Click **Search** to view the results.

Postal Mailing Exclusions – IMPORTANT

In order to exclude contact records that have the "do not mail" privacy setting selected, have no street address data in their record, or who are marked as deceased be sure to check off the **Postal Mailing Export** option on the export screen.

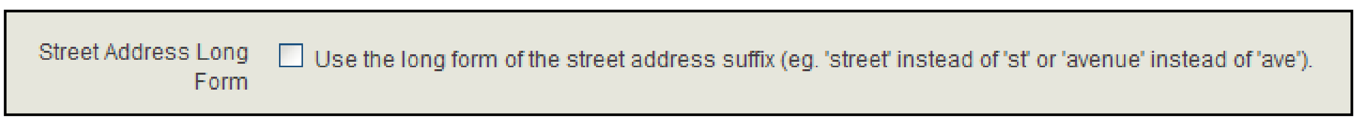


Additional Group for Export

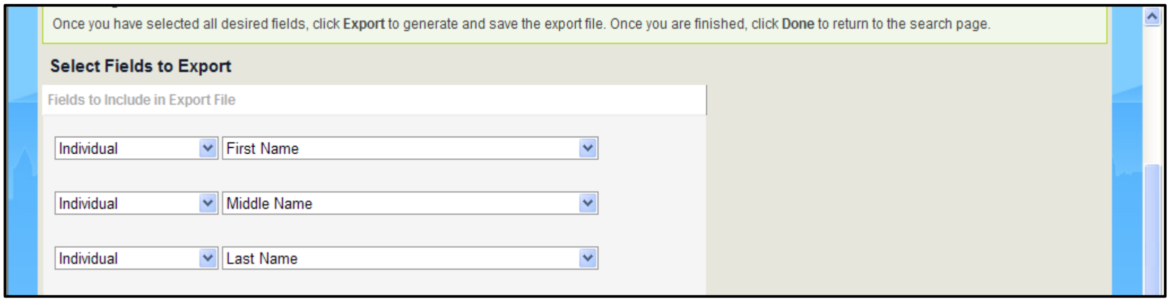
This option is available for you to select an additional group to mail to such as your Mailing Seeds group.   Click the **drop down** and select the **desired group**.

Street Address Long Form

Select this option to display addresses in long form (i.e. Street instead of St.)



6. Click **Continue**. The **Select Fields to Export** page will appear with the preset fields of whichever Saved Field mapping you selected. You can either adjust these fields or scroll down to the bottom of the page then click **Export**.



7. Click **Export**. At the File Download box, click **Save As** to save the file or **Open** to open the CSV file.

8. If you clicked **Save As**. The Save As dialog box will appear. Select the desired location and name the file. (Do not change the Save as Type in this window.)

9. Click **Save**.

10. At the download complete dialog box, either click **Open** to open the saved file or click **on the X** to close out of this box and continue working in Bluebird.

11. After the Download Complete dialog box is closed, you will still be on the Select Fields to Export screen within Bluebird. Click **Back** to return to your search results. From here, you can Record a Letter (outgoing) Activity for all of these contacts. (See steps in this manual titled **Bulk Adding an Activity to Multiple Contact Records.**) You can also **Tag** these records if necessary from the actions drop down menu.

12. If you are done working with this list, click the **Dashboard** button.

Recording an Activity

If your Senator is interested in recording communication between the office and their constituents, they may want you to record an activity for mail that you send out from the office. You can do this by adding an activity to Bluebird under the constituent's record. You can add an activity one at a time per record or you can add an activity to many records at a time by using the bulk add feature.

Add Activity to More than One Record (bulk add)

1. In the search result window, click **All** or **Selected records only.** (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)
2. After selecting the records, click **Actions**, then click **Add activity.**
3. Click the **drop down arrow** across from Activity Type and select **Letter Outgoing**.
4. Click in the **check box** next to **Create a separate activity for each contact**.
5. Click the **drop down arrow** across from Activity Status and change it to **Completed**.
6. If desired, fill in any other fields on the form. (You can also add an attachment of the letter that was sent. The attachment will go into this Activity for all contacts it is being assigned to.)
7. When done, click **Save**.

Add Activity to One Record

1. Go to the constituent's record you would like to add the activity to.
2. Click on the blue **Actions** button next to the Edit button. Click **Letter (outgoing)**.
3. Click the **drop down arrow** across from Activity Status and change it to **Completed**.
4. If desired, fill in any other fields on the form. (You can also add an attachment of the letter that was sent. The attachment will go into this Activity for all contacts it is being assigned to.)
5. When done, click **Save**.

Mail Merges

A mail merge is used when you have one common document layout (i.e. letter), that need to be combined or merged with different recipients. For example, your office may have received a petition from 50 people all supporting the same topic. Instead of typing the same letter 50 times, you set up the letter once (main document), then create a list with the names and address of each person (data source). Lastly, you merge them together and then print your 50 letters.

Parts of a Merge

Data Source: The data source contains the information to be merged into the main document. This is usually names and addresses.

Main document: The main document has the same layout for each person receiving the letter. Only the information on it will be different for each person. This is usually a letter, a sheet of labels or an envelope.

Mail Merge Fields: The mail merge fields need to be added to the main document. Once the mail document and the data source are merged, the fields are replaced with the text in the data source document.

Preview: Use this option to preview the completed merge to check for errors before printing the merge document.

Printing: Print the final merge.

Tips about Merge fields

When adding merge fields to a letter, envelope, or label, be sure to keep the following information in mind:

If mailing to an Individual at their home address use the following merge fields:

- Addressee field (Pulls in Prefix, First Name, Middle Name, Last Name, and Suffix. If you don't want to use this preset field, you will have to add each of the aforementioned fields individually)
- Building
- Street Address
- Mailing Address
- City (add comma after this field)
- State
- Postal Code
- If desired, Postal Code suffix
- Postal Greeting (This field already contains the word Dear and it pulls in the postal greeting to the contact's Bluebird record. Prefix, Last Name is the default)

If mailing to an Organization. (Based on search criteria using Contact Type equal to Organization) Use the following merge fields:

- Addressee field (Pulls in Name of Organization)
- Building
- Street Address
- Mailing Address
- City (add comma after this field)
- State
- Postal Code
- If desired, Postal Code suffix

Note: There is no Postal Greeting offered when merging Organization records. This is because there are no First Name, Middle Name and Last Name fields available when creating an Organization record in Bluebird. If desired, you can add your own Postal Greeting to your letter. (i.e. Dear Sir/Madam.)

If mailing to all Employees of an Organization. (Based on search criteria "Searching for Employees of an Organization) Use the following merge fields:

- Addressee field (Pulls in Prefix, First Name, Middle Name, Last Name, and Suffix. If you do not want to use this preset field, you will have to add each of the aforementioned fields individually.
- Type the **Name of the Organization** and the **Organization Address** directly on the letter.
- Postal Greeting (This field already contacts the word Dear. It pulls in whatever postal greeting option that was applied to the contact's Bluebird records. Prefix, Last Name is the default)

Note: In order to eliminate having to type the Name of the Organization and Organization Address onto the letter, you will need to make sure that the Individual's records in Bluebird have the Current Employer and Job Title fields filled in. As well as a second, address marked Work. Then you can add the fields for Current Employer, Job Title and Work Address directly to the letter in place of typing the information in.

Merging a Letter

Creating the Letter

Depending on what you want to do, select one of the options below to setup a letter as your main document

- Use one of the STS created Letter templates to format a blank page (Refer to Creating Individual Letters, Labels and Envelopes documentation).
- Start with a New Blank document and format it on your own using the Page Layout tab (Refer to the Introduction to Microsoft Word 2007 documentation). or
- Open an existing letter.
- After choosing one of the above options, you are now ready to begin. You may now:
    - Type your Letter
    - Run the Spelling and Grammar option
    - Add a graphic signature to the Letter (Refer to Creating Individual Letters, Labels and Envelopes documentation)
    - Save the Letter

Starting the Letter Merge

You will now need to let Microsoft Word know that you want to use the letter that you just created as a main merge document.

1. With the letter still on the screen, click the **Mailings** tab from the Ribbon.
2. Locate the *Start Mail Merge* group.
3. Click the **Start Mail Merge** button.
4. Click **Letters**.

Selecting the Recipients List

1. From the *Start Mail Merge* group, click the **Select Recipients** button.
2. Click **Use Existing List**.
3. Select the **file** and click **Open**.

Adding Merge Fields to the Main Document

Complete the steps below to add the necessary merge fields into the main document. Once merged the fields will be replaced by the actual data typed in the data source file.

1. Place the insertion point where the first field needs to appear within the main document.
2. From the Mailings tab, locate the *Write & Insert Fields* group.
3. Click the **arrow** on the Insert Merge Fields button. (All of the fields from the data source will appear.)
4. Click the **field** to be inserted. (It will now appear in the document. Remember when adding fields, you need to put the spaces and punctuation where needed.)
5. Continue to follow the steps above until all fields have been added.
6. When done, **save the document**.

Note: If you want to add an Envelope to your merge letter, select the **address merge fields** in the letter, from the Ribbon, click the **Mailings** tab, Locate the *Create* group and click **Envelopes**. If necessary, adjust the envelope options, then click **Add to Document** button.

Previewing the Merge Documents

The final steps of the completing the merge include previewing and printing. Complete the steps below to finish the merge process.

1. After inserting the merge codes into the main document, locate the *Preview Results* group.
2. Click the **Preview Results** button to display the actual data from the data source file.
3. Use the **arrows** within the Preview Results group to view the next or previous record.

Printing the Merge

1. Locate the *Finish* group.
2. Click the **Finish and Merge button**.
3. Click **Print document**.
4. When the printer window appears, if necessary, make any changes.
5. Click **OK** to print.
6. When done close the document without saving.

Merging an Envelope

Starting the Envelope Merge

1. Click the **File Tab**.
2. Click **New**.
3. Click **Blank document**.
4. From the Ribbon, click the **Mailings** tab.
5. Locate the *Start Mail Merge* group.
6. Click the **Start Mail Merge** button.
7. Click **Envelopes**. The envelope options window will appear. Make any necessary changes.
8. Click **OK** when done.
9. You will now have a blank envelope on the screen.

Selecting the Recipients List

1. From the *Start Mail Merge* group, click the **Select Recipients** button.
2. Click **Use Existing List**.
3. Select the **file** and then click **Open**.

Adding Merge Fields to the Main Document

Complete the steps below to add the necessary merge fields into the main document. Once the merge is complete the fields will be replaced by the actual data typed in the data source file.

1. Place the insertion point where the first field needs to appear within the main document.
2. From the Mailings tab, locate the *Write & Insert Fields* group.
3. Click the **arrow** on the Insert Merge Fields button. (All of the fields from the data source will appear.)
4. Click the **field** to be inserted. (It will now appear in the document. Remember when adding fields, you need to put the spaces and punctuation where needed.)
5. Continue to follow the steps above until all fields have been added.
6. When done, **save the document**.

Previewing the Merge Documents

The final steps of completing the merge include previewing and printing. Complete the steps below to finish the merge process.

1. After inserting the merge codes into the main document, locate the *Preview Results* group.
2. Click the **Preview Results** button to display the actual data from the data source file.
3. Use the **arrows** within the Preview Results group to view the next or previous record.

Printing the Merge

1. Locate the *Finish* group.
2. Click the **Finish and Merge button**.
3. Click **Print document**.
4. When the printer window appears, if necessary, make any changes.
5. Click **OK** to print.
6. When done close the document without saving.

Merging Labels

Starting the Labels Merge

1. Click the **File Tab**.
2. Click **New**.
3. Click **Blank document**.
4. From the Ribbon, click the **Mailings** tab.
5. Locate the *Start Mail Merge* group.
6. Click the **Start Mail Merge** button.
7. Click **Labels**. Click **OK** when done.

Note: The Labels Options window will appear. If necessary, make any desired changes.
(Refer to the Creating Individual Letters, Labels and Envelopes documentation)
3 labels across by 10 down: Vendor - Avery US Letter, Product number - 5160
2 labels across by 10 down: Vendor - Avery US Letter, Product number - 5161
2 labels across by 7 down: Vendor - Avery US Letter, Product number – 5162 (Senate Seal)
3 labels across by 8 down: Vendor - A-ONE, Product number - A-ONE 28386

Selecting the Recipients List

1. From the *Start Mail Merge* group, click the **Select Recipients** button.
2. Click **Use Existing List**.
3. Select the **file** and then click **Open**.

Adding Merge Fields to the Main Document

Complete the steps below to add the necessary merge fields into the main document. Once the merge is complete the fields will be replaced by the actual data typed in the data source file.

1. Place the insertion point where the first field needs to appear within the main document.
2. From the Mailings tab, locate the *Write & Insert Fields* group.
3. Click the **arrow** on the Insert Merge Fields button. (All of the fields from the data source will appear.)
4. Click the **field** to be inserted. (It will now appear in the document. Remember when adding fields, you need to put the proper spaces and punctuation where needed.)
5. Continue to follow the steps above until all fields have been added.
6. From the Mailings tab, locate the *Write & Insert Fields* group, click the **Update Labels** button to apply fields to all labels.
7. When done, **save the document**.

Previewing the Merge Documents

The final steps of the completing the merge include previewing and printing. Complete the steps below to finish the merge process.

1. After inserting the merge codes into the main document, locate the *Preview Results* group.
2. Click the **Preview Results** button to display the actual data from the data source file.
3. Use the **arrows** within the Preview Results group to view the next or previous record.

Printing the Merge

1. Locate the *Finish* group
2. Click the **Finish and Merge button**.
3. Click **Print document**.
4. When the printer window appears, if necessary, make any changes.
5. Click **OK** to print.
6. When done close the document without saving.

Adding a Graphic Signature to a Document

Inserting the Graphic

1. Place the insertion point in the location where the graphic signature will appear.
2. From the Ribbon, click the **Insert** tab.
3. Locate the *Illustrations* group and click the **Picture** icon.
4. Select the **graphic** and click **Insert**.

Adjusting a Graphic Signature

Moving a Graphic Signature

1. Click once directly on the **graphic signature** to view the frame.
2. From the Ribbon, select the **Format** tab.
3. Locate the *Arrange* group and click the **Text Wrapping** option.
4. Click **Behind Text** (this will allow you to see any text that may be near where you inserted the graphic signature).
5. Point to any of the *solid lines* surrounding the frame (you will see a four-way arrow where the insertion point was).
6. Click and **drag frame** to desired location.

Resizing a Graphic Signature

1. If necessary, click once directly on the graphic signature to view the frame.
2. Point to any of the *sizing circles* in the corners of the frame (you will see a diagonal two-way arrow where the insertion point was).
3. Click and **drag frame** the mouse to resize the graphic signature.

Adjusting Text near a Graphic Signature

- Click away from the graphic signature so the frame goes away. Adjust the text as desired.

Deleting a Graphic Signature

- Click once directly on the graphic signature to view the frame. Press the **Delete key** on the keyboard to delete the graphic.