**Personalized Greetings — the Dear Token**

The system allows you to personalize greetings in bulk email sends, but this is not always a good idea. Erroneous greetings can be off-putting. It is safer to just jump into the message – “Thanks for reaching out . . . “. But if you feel strongly about personalizing messages, you can use the “Dear Token”.

**What is the Dear Token?**

The “Dear Token” is just a text string: |||\*Dear\*|||

**What is the Dear Token good for?**

It allows you to personalize greetings in email replies from the inbox and in list sends.

**Why does have to say Dear instead of Hi?**

It can say Dear, Hi or Hey. You have flexibility to choose under Controls in the inbox. In this documentation, the word Dear is used but it can be whichever you choose.

**Exactly how does the Dear Token behave?**

On the constituent add/update screen, there is a “Salutation” field. You can put whatever you want in the salutation field. You can use it to be more formal or less formal. For example, if you have a constituent named ‘Elizabeth Smith’, you could choose the formal salutation ‘Dr. Smith’ or the informal ‘Betsy’.

When WP Issues CRM sees the Dear Token in an inbox reply or a list send, it will replace it *as it puts the message in the outbox* with one of the following:

1. “Dear Salutation,”
2. If no Salutation is present: “Dear Firstname,” (converting database value for first name automatically to proper case).
3. If neither Salutation nor Firstname is present, the token will just be removed.

The Dear Token adds the trailing comma in the first two cases. The Dear Token does not add a new paragraph mark, so insert it where you would like it to show with a new line after it. Experiment by sending a message to yourself and then replying to it or test a list send to a short list of office mates.

The token will not be replaced until you actually send the email. The replacement occurs after you send, as WP Issues CRM puts the message(s) in the outbox.

**What is the easy way to add the Dear Token?**

The editor will show you a “Dear” button when you are editing any of the following:

* A reply to a message.
* A draft of a message to a list.
* A Saved message reply template.

When you click the Dear button, the Dear Token will be inserted at the cursor position (which initially is always at the start of the message).

**Are there places where the Dear Token doesn’t work?**

Yes. The Dear Token does not work . . .

* . . . if you are simply composing a new message.
* . . . if you are replying to a message that has already been sent or archived, as opposed to replying from the inbox.
* . . . the second time it appears in a message.

**How can I remember where it works?**

In general, if the editor shows you a Dear button, it will work. If it doesn’t, it won’t. So, just use the Dear Button — don’t enter a Dear Token manually.

**Should I use the Dear Token?**

In general, you should use the Dear Token if your work flow allows you to properly define Salutations for most constituents. In many offices, the original constituent list, likely a voter list, contains only formal first names — William instead of Will, Elizabeth instead of Betsy. For people who use their nick names to sign most correspondence, a reply that uses their formal first name may be perceived as impersonal and therefore ignored. Conversely, for a few constituents, use of first name may be perceived as unduly familiar.

Some feel that the best practice is to find another way to begin emails unless you consistently know the appropriate salutation for your constituents. For example, instead of saying “Dear William,” just start right in with “Thanks for reaching out.” However, others feel that best practice is to always use a salutation and take a few risks of getting the salutation wrong. It depends a lot on the style of the emails you tend to send — more conversational emails do not need a salutation. More lengthy and formal emails may call for a salutation. You can vary your practice, using the Dear Token in some templates but not in others.