New York State Senate

BLUEBIRD

Postal Mailings

Constituent Relationship Management Software

Senate Technology Services
Helpline: 518-455-2011

Table of Contents

Mailings

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

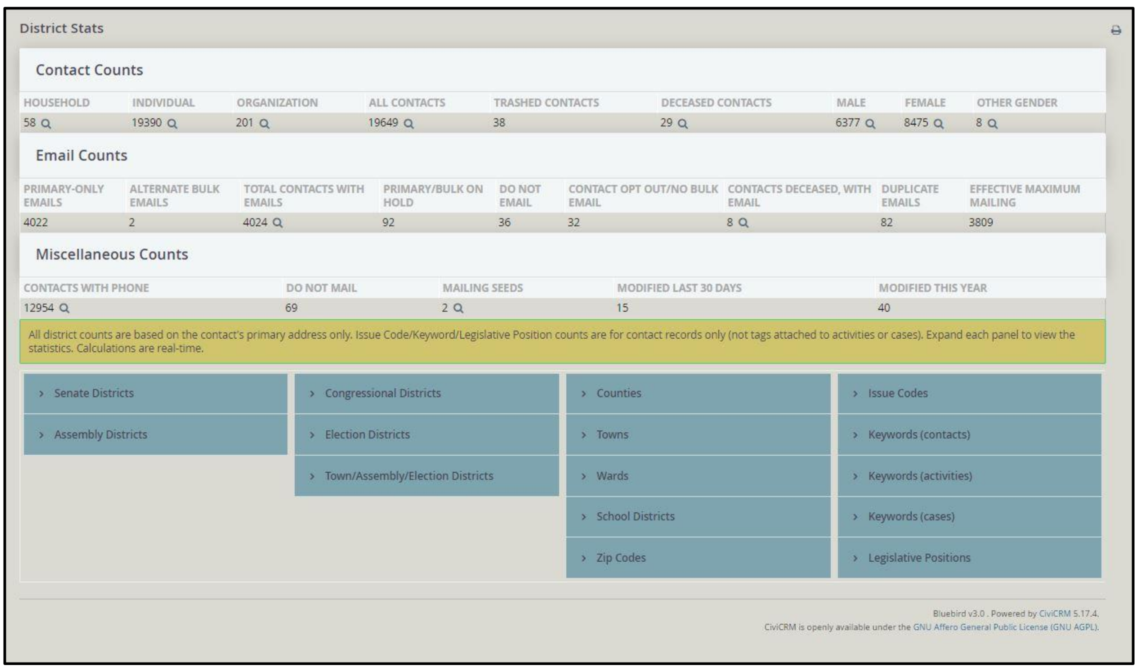
The three basic steps to produce a mailing are:

- **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.
3. Click on the **magnifying glass** next to the stat to conduct an Advanced Search, this will then let you create a Group or Tag these records.



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 constituents in Albany County, you could save that search for future use and title it Albany County Smart Group. If another staff person enters a new contact that lives in Albany County, they would appear in the Albany County Smart Group results the next time it is run because they meet the criteria.

Working with Static Groups

Creating a Static Group from the Create Menu

1. From the main navigation area, click the **Create** menu, and then click **New Group**.

2. Type a **name for** the group in the Group Title box.

3. If desired, type a **description**. *Note: a group's description only shows up on the Manage Group screen.*
1.
4. If desired, choose a **Parent Group**.

5. Click **Save**.

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,** and 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 you know you will be using this group for a Mass Email within Bluebird, check the **Email List** or **Test Email List** options in the Group Type section.

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** button and type in the filter box the name of the **desired group**. Click **the group** and then 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 **records** and then click **Actions**.
3. Click **Group – Add Contacts**.
4. Make sure the radio button is selected next to **Add Contacts to Existing Group**.
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 **the three dot menu**, across from the Group that you would like to edit.
3. When you click on **the three dot menu**, 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. In the Current Groups listing 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 **the three dot menu** across from the Group you want to disable.

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

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**. Across from the Group, click **the three dot menu**, **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 **the three dot menu** across from the Group you want to delete.

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

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

Adding Staff Members to the Office Staff Group

In order to use the *Assign To field* within Activities and Cases, you first need to have your office staff listed in the Office Staff Group. Complete the steps below.

To add one person at a time:

1. Search the database to find the **Office staff user record** you want to add to this group.
2. From the Office staff user's record view screen, click on the **Groups tab**.
3. Click **Add to a group** and select **Office Staff** from the list.
4. Click **Add.** This contact is now added into this Group.

To bulk add:

1. Click in the **Quick Search** box and select the radio button next to Email.
2. Type **%@nysenate.gov** and then press **Enter** on your keyboard.
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** and click **Group - Add Contacts**.
5. In the select group drop down menu, choose **Office Staff**.
6. Click **Add to Group**.
7. A message popup box 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

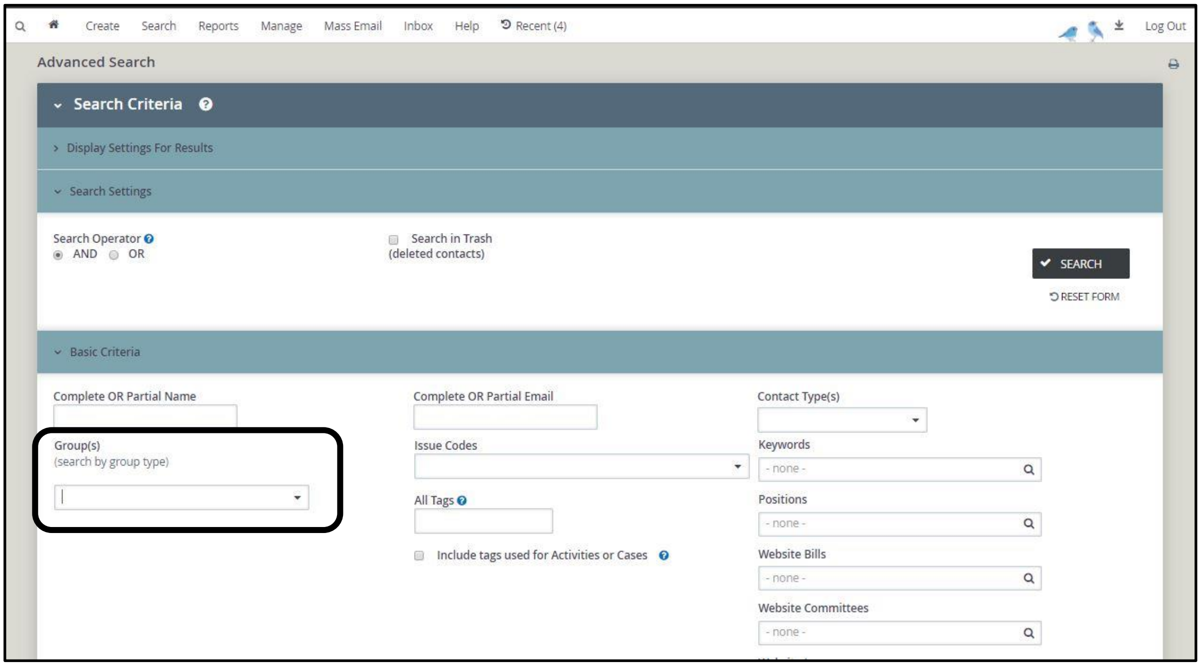
1. Search the database to find the **desired common** records.

> **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. After selecting the desired records, click **Actions** and then click **Group – Create new smart group.**
4. Type a **name** for the Smart Group. If desired, enter in a description.
5. If you know you will be using this group for a Mass Email within Bluebird, check the **Email List** or **Test Email List** options in the Group Type section.
6. Click **Save Smart Group**.
7. 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 **Search**, then click **Advanced Search**.
2. Under the Basic Criteria section, click the **dropdown arrow** under Groups.



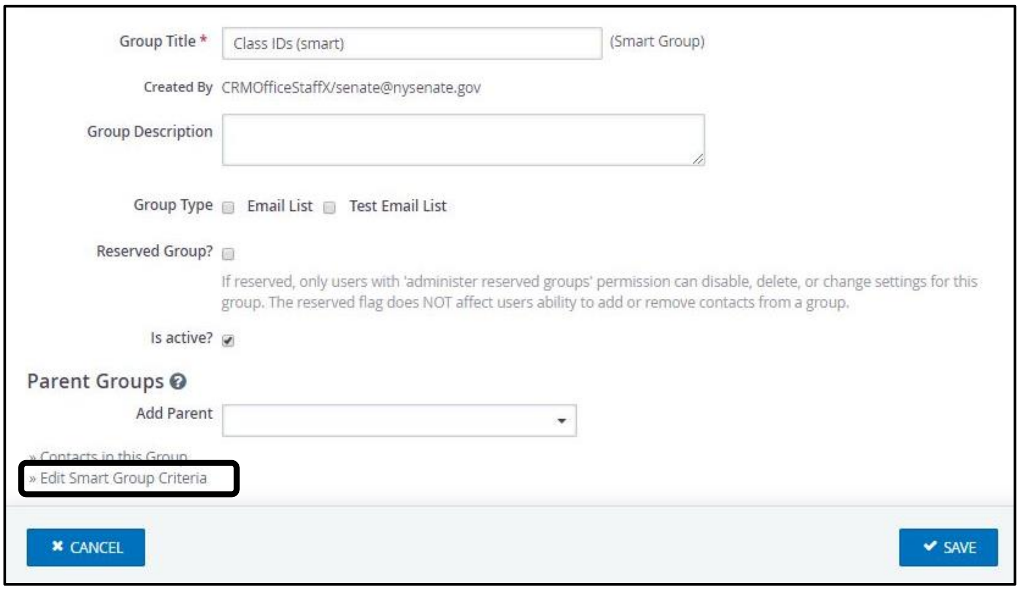
3. Click the **desired Group**.
4. Click **Search** to display a list of names.

Editing a Smart Group Name, Description or Email List status

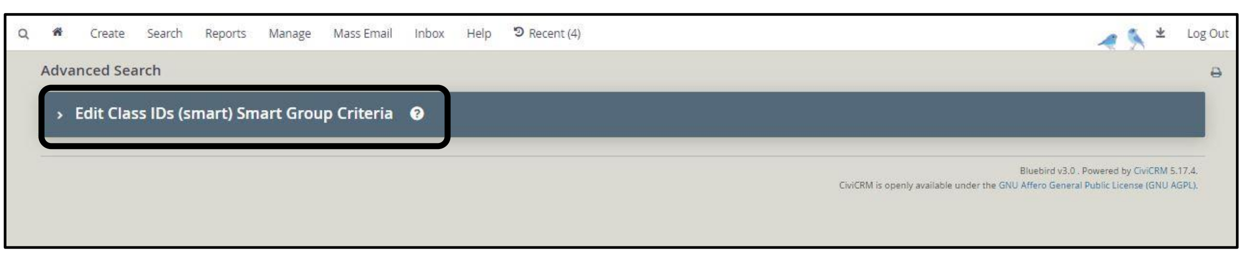
1. From the main navigation area, click **Manage**, and then click **Manage Groups**.
2. Click on the **three dot menu**, across from the Group that you would like to edit.
3. When you click on the **three dot menu**, a menu will appear that gives you three options: **Settings**, **Disable**, or **Delete**; 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 a Smart Group Criteria

1. From the main navigation area, click on the **Manage menu**, and then click **Manage Groups**.
2. Click on the **three dot menu** link, across from the Group that you would like to edit.
3. When you click on the **three dot menu** 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

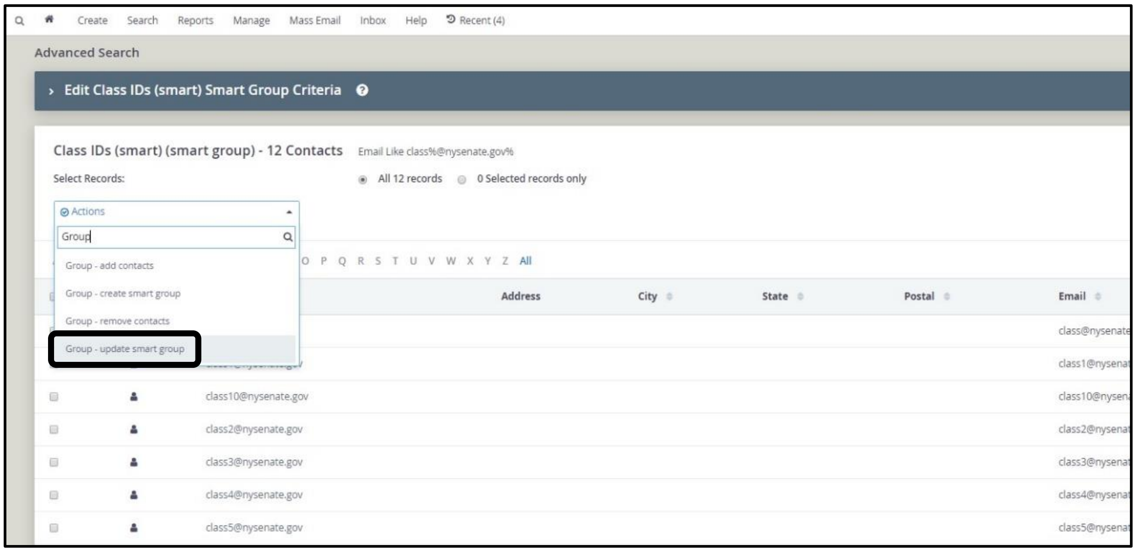


5. On the next screen click on the expandable panel titled **Edit [Group Name] Smart Group Criteria** at the top of the screen. This will open the Advanced Search panel.

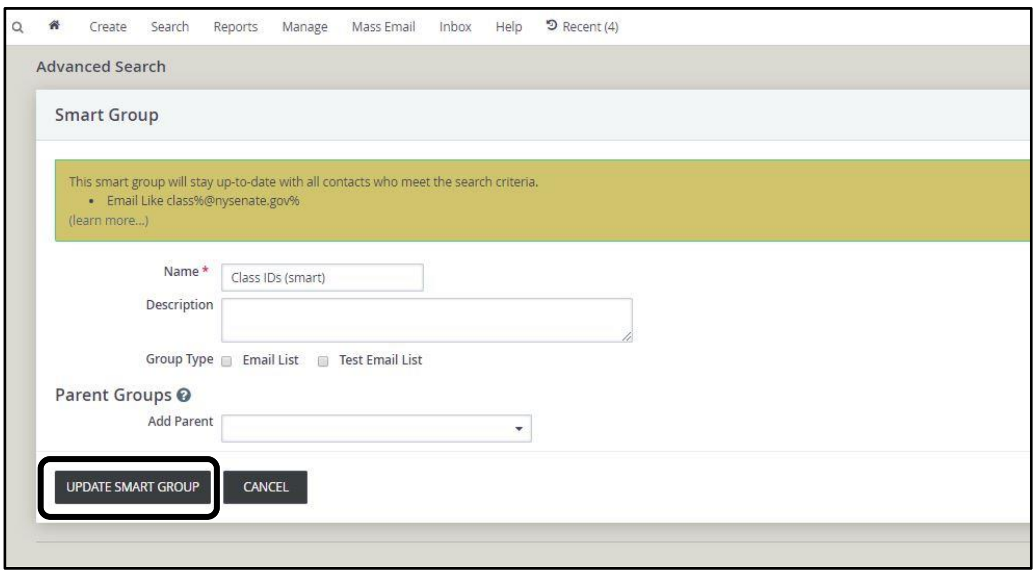


6. Make adjustments needed to the Advanced Search criteria and then click **Search**.

7. The screen will refresh with an updated view of the Advanced Search results page, select the radio button for All # records, select **Update Smart Group** from the dropdown Actions menu, click on Go.



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



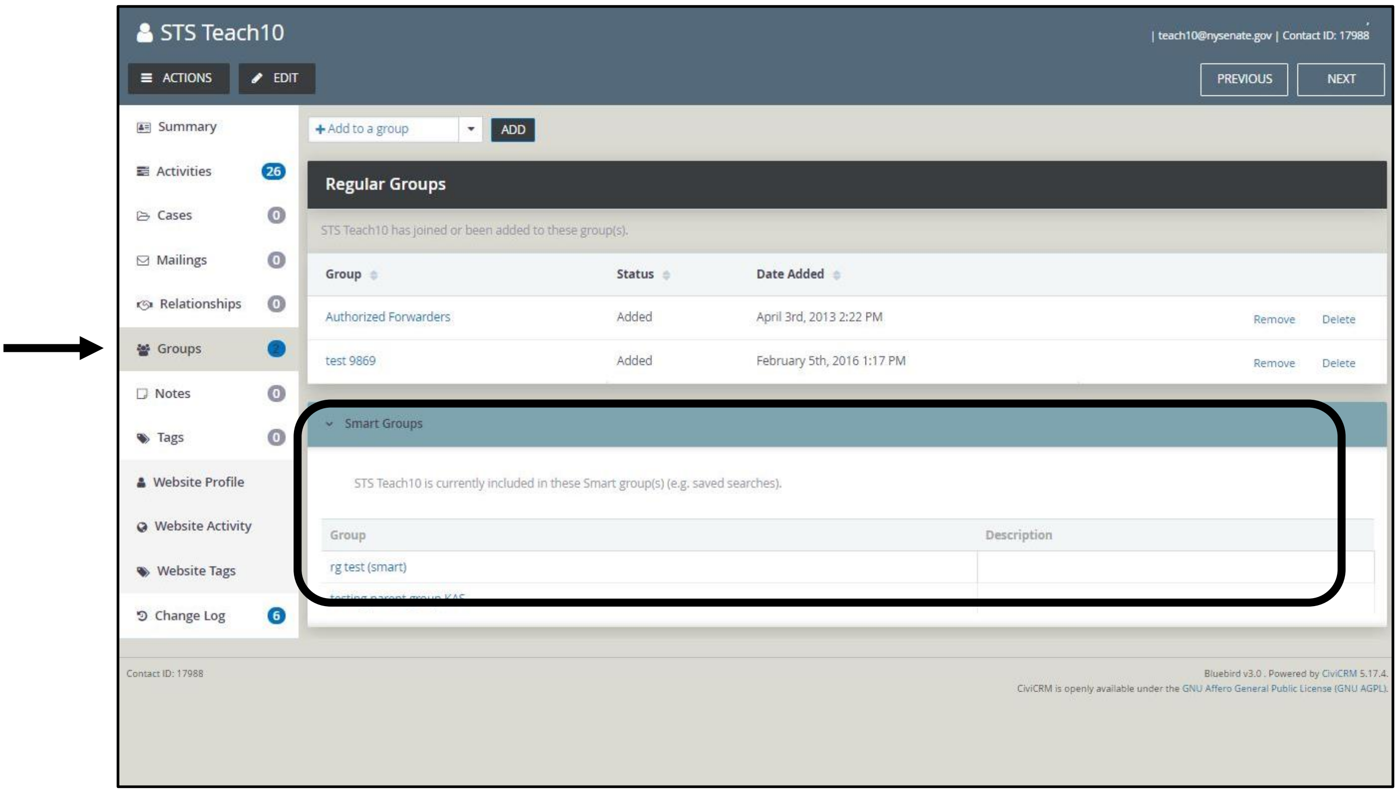
8. You will see the button change to Processing, then a message popup box will tell you the Smart Group has been saved. On the next page, click Done.

2.

3. Note: This will bring you back to the Edit Advanced Search criteria page. You can click the Home icon 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.



Search Menu

Advanced Search

General Information

Used to search for virtually any information available in the database.

- Click **Search,** from the main navigation menu, and then **Advanced Search** to open the search interface, 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 fields let you set multiple criteria by using a comma separator.

- 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 Activities or Cases.

- 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 search results.

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

By selecting **AND** under Search Operator**, Aging** under Issue Code(s), and typing **11720** in the Zip Code field the result will show all contacts with the Issue Code Aging who live in Zip Code 11720.

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

By selecting **OR** under Search Operator, **Aging** under Issue Code(s), and typing **11720** 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 11720 even if they do not have the Issue Code Aging.

Conducting an Advanced Search

1. Select the **Search** menu, and then click **Advanced Search**.
2. Fill out desired criteria.
3. Click the **Search** button to display the search results list.
4. Click on one of the following links to access a record:
   - **Hyperlinked name or View**: takes you to the contact record.
   - **Edit**: takes you to the contact record's edit screen.
   - **Contact icon**: shows basic details about the contact through a popup screen.

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. Select the **Search** menu, and then click **Advanced Search**.
2. Under the Basic Criteria panel click the check box titled **Search in Trash**.
3. Click the Search button to display the search results list.
4. Under the actions drop down menu at the top of the screen you can restore contacts.

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

Find Cases

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

- Cases by Constituent Name or Email
- Case Start/End Dates
- Case Type
- Status
- Case Tags

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)
- Activity Type
- Activity Dates
- Activity Subject
- Activity Status
- Activity Details
- Activity Tags
- Place of Inquiry
- Activity Category
- Website Survey

Find Anything

Find Anything is best used for searching attachments associated with contact records, activities, or cases. Bluebird will only search for the name of an attachment, not text within the attachment. You may search for specific file types (i.e. .jpg).

Attachments

- Select the **Search** menu, and then click the **Find Anything** box and type the **desired attachment name** or **the file extension**. This is not an auto-complete field; you must type in all of the desired text.

- Press **Enter** to conduct the search and display the results list.

- After conducting a search, you can narrow down the results by selecting a specific record type (Contacts, Activities or Cases).

- To view the attachment, click on the paperclip icon and the attachment will download onto your computer.

Search Builder

This Search allows you to build your own searches based on fields and operators. You can save your searches once they are built.

Proximity Search

This search finds records residing in the same postal code.

1. Click **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 the middle of the postal code.
3. Click the **Search** button. The search results window will appear showing the total number of records found.

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 **Search** menu, then click **Birthday Search**.
2. Fill in **desired information**.
3. Click the **Search** button. The search results window will appear showing the total number of records found.

Include/Exclude Search

This search allows you to include or exclude certain groups from your results. A common reason for this search is if you want to do a district wide constituent postal mailing but would like to exclude members of the press. 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 **Search** menu, then click **Include/Exclude Groups/Tag**.
2. From the Include/Exclude fields, select the **desired Group/Tag to Include and Exclude**.
3. Click **Add** to add into the search results box. If you need to remove an option, click it from the search results box and then click Remove.

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

4. Click the **Search** button. The search results window will appear showing the total number of records found.

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.

Tag Count Search

Use this search to generate counts for Tags based on date ranges for when the contacts were tagged.

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.

Tag Demographic Search

This search allows you to group Tags and Demographics together to get a count in your database.

For example, I want to see how many people in each postal code in my database are interested in the Issue Code of Aging. I can conduct this search by selecting Aging as my Tag and then Postal Code as my demographic; the results will give me a screen with all of my postal codes with a count of how many records are tagged with Aging.

This type of search is different from Advanced Search because it is only giving a count; you will not get a result of contact names with this search OR receive the actions menu to then do other things to this list (i.e. Tag all results).

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 it 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.
- **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. After selecting the records, 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.

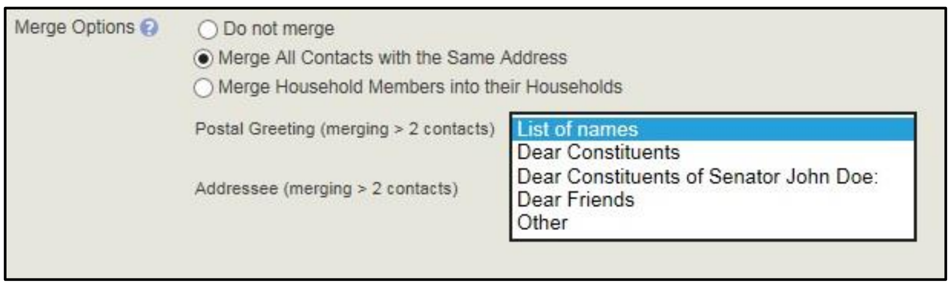
Merge Options

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

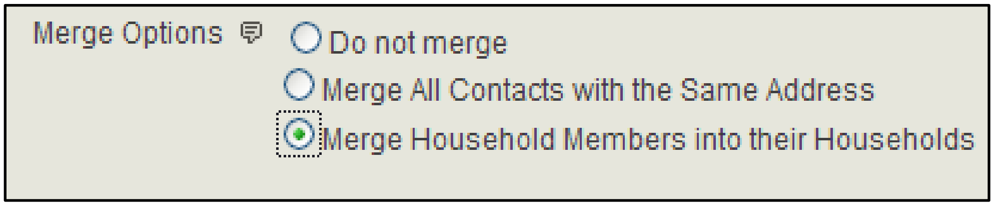
4.

- *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.



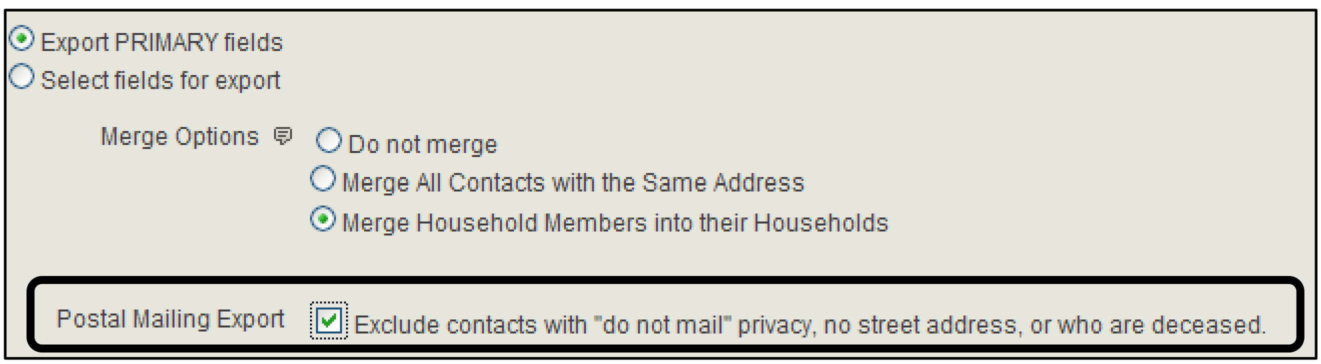
- *Merge Household Members in their Households:* This option will export the household record for any contacts sharing a household address. Bluebird addresses the letters with whatever Postal Greeting option was selected in the Household record.



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.

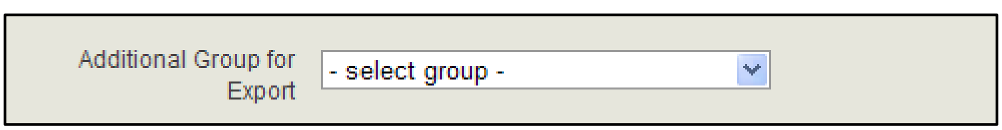
Postal Mailing Exclusions – IMPORTANT

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.



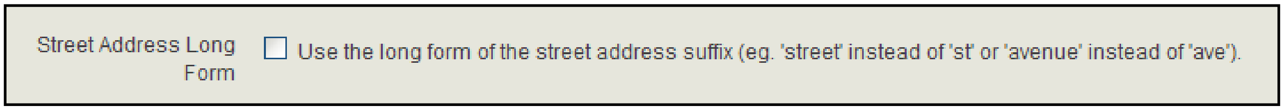
Additional Group for Export

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

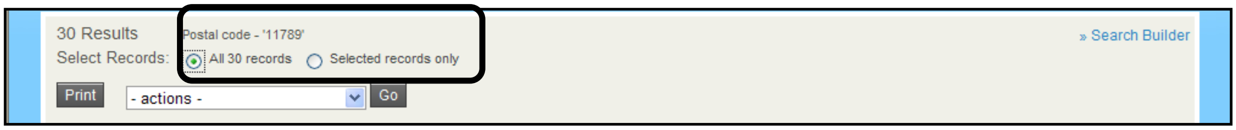
Select this option to display addresses in long form (i.e. Street instead of St. or Avenue instead of Ave.)



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 **Done** 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 **Home** button.

Export Using the Select Fields for Export Option

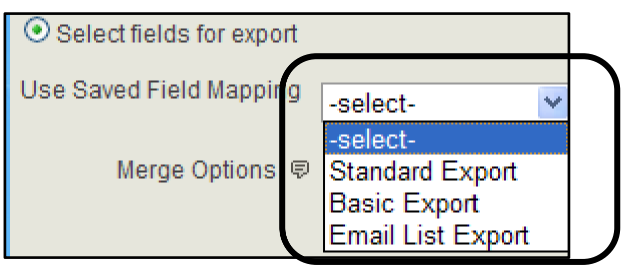
1. In the search result window, click **All or Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)

5. 

2. After selecting the records, click **Actions** and then click **Export Contacts.**

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.

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- *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.

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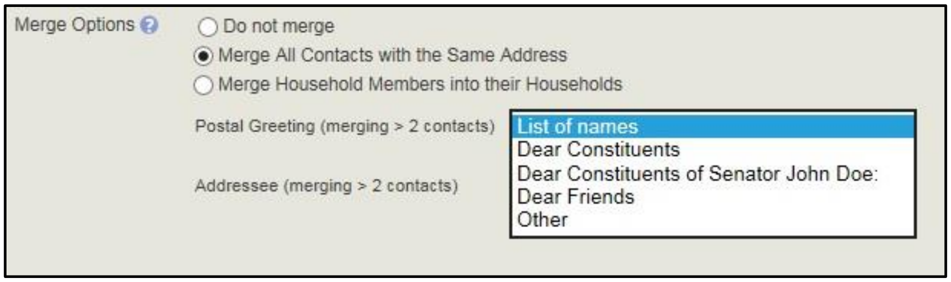

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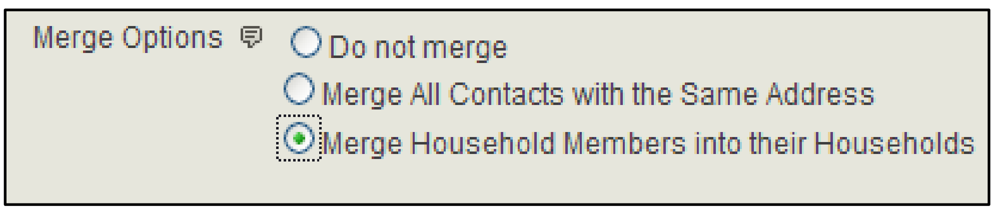

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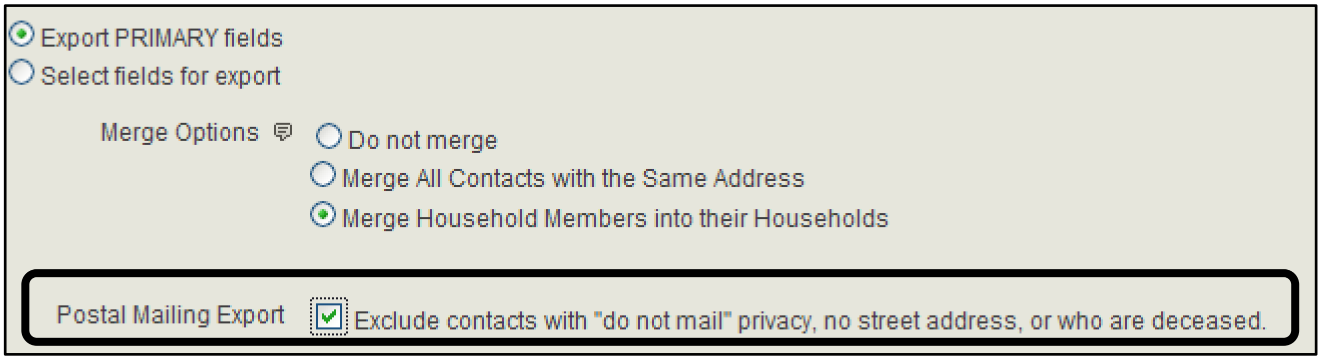

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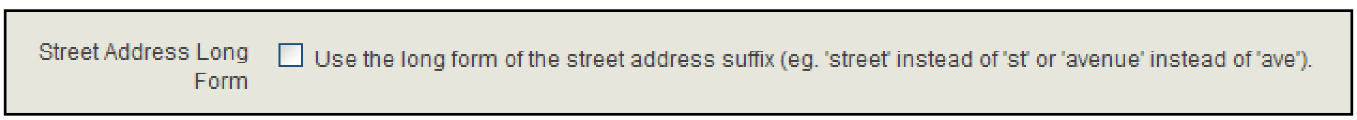
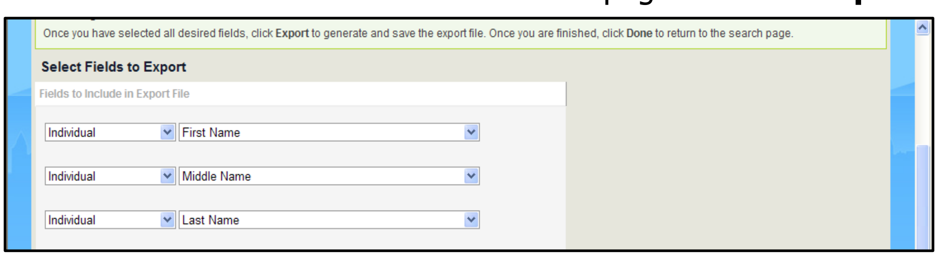
Street Address Long Form

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 make adjustment to these fields or scroll down to the bottom of the page and 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 **Done** 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 **Home** 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.