crimson

Mail Merge Feature

User can run any of the major [Filtered Searches] available throughout Crimson and seamlessly run a Word doc mail merge for the resulting records.

Mail Merge is available in the following areas: **People Search**, **Money Search**, **Thank You List Select**, **Best Efforts**, and **Exception Codes**.

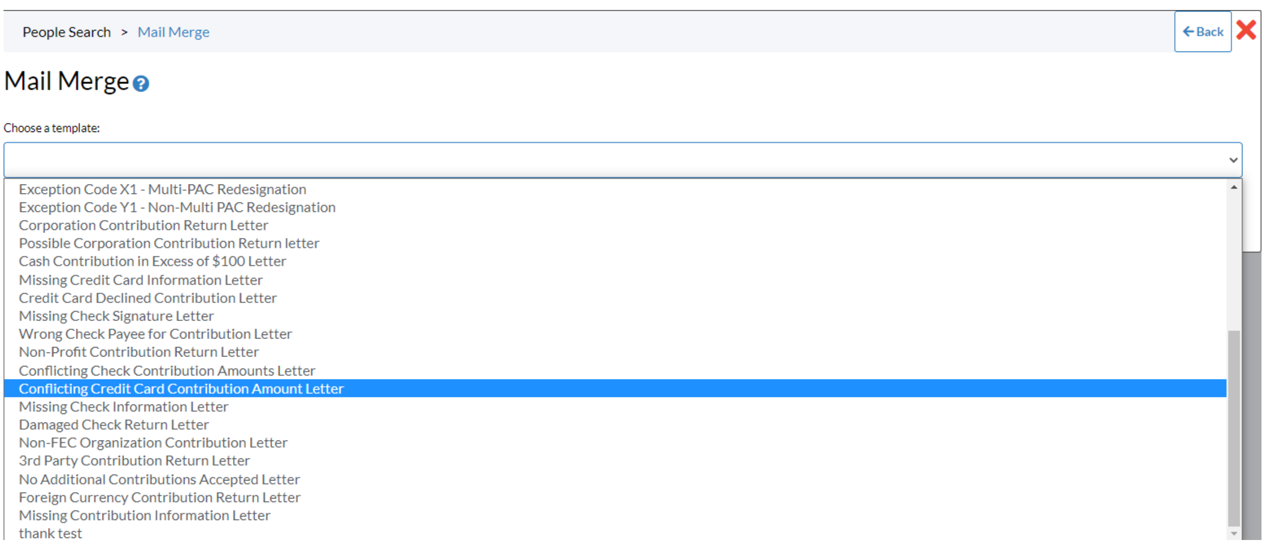
For a list of possible Mail Merge fields to use in your Word Template, please consult this Mail Merge excel. Each sheet contains the possible template fields and the corresponding Crimson Export field name (for example, FIRSTNAME will pull the Crimson Export FNAME data) for each type of mail merge. If you have suggestions for additions to this list, please contact CrimsonSupport@cmdi.com.

Sections below include Word Document Templates (Thank you, Exception Codes, etc). Check here for miscellaneous templates for missing check information, foreign currency, and more.

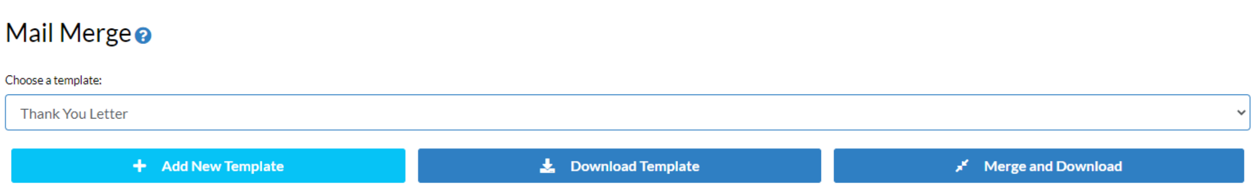
Mail Merge

Once you have reached the Mail Merge window, use the following steps to complete your merge. See the sections below for how to access the Mail Merge window from the different sections in Crimson.

1. Select the desired template from the drop-down list.



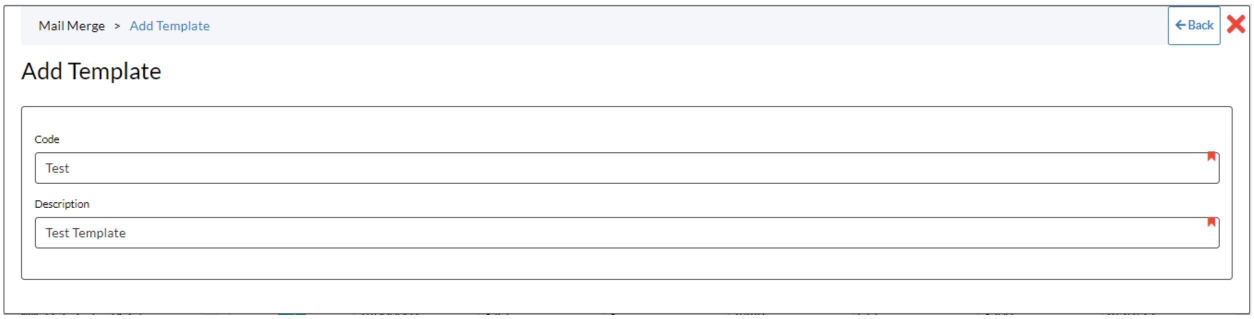
2. You can either click **Download Template** or **Merge and Download**. The download feature will download the template and clicking merge will begin the merge.



3. If the mail merge is successful, then Crimson will download the merged document. If not all the template's fields will merge, Crimson will give you a list of the fields not merging with the question "Do you still want proceed?" Click Yes to continue with a download.

Adding a Template

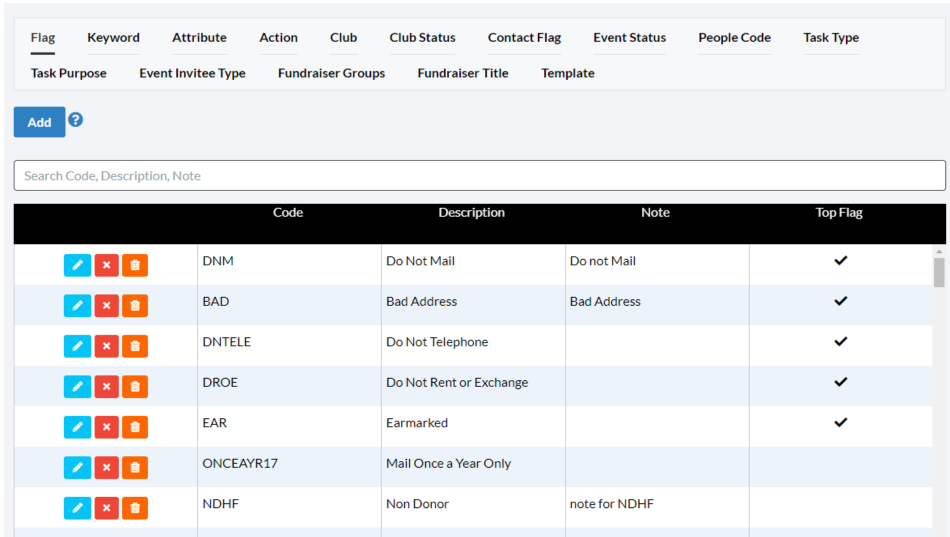
From the Mail Merge bar, you can click **+ Add New Template** to add a mail merge template. Enter the Code and Description. The Code is limited to 10 characters.



Click Save, and then an import icon will appear. Press to upload a template. The template must be a Word Document. Click Save again to save the template.

Managing Templates

To edit or delete templates, got to the **People Settings**. You can access this from the **People Dashboard's Navigation Bar**. From the settings, select the **Template** tab. You can use the search bar to search for a template. To view a template, click . From the **Edit Template** window, you can update the Code, Description, or remove and upload a new template file. Click Save to finalize any edits. Delete a template by clicking .



People Search

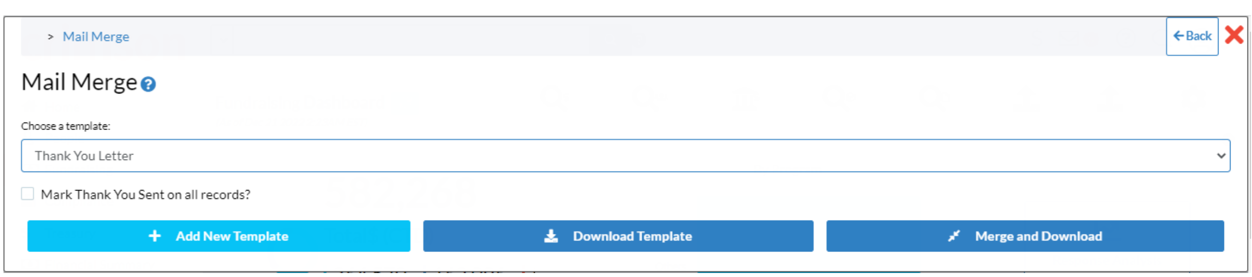
To complete a People mail merge, use the **People Search** to get the donor record results you want to merge. On the results window, click the button in the bottom left and select Mail Merge. The Mail Merge Bar will appear.

Money Search

To complete a Money mail merge, use the **Money Search** to get the donor record results you want to merge. On the results window, click the button in the bottom left and select Mail Merge. The Mail Merge Bar will appear.

Thank You List Select

To complete a Thank You mail merge, use the **Thank You's Needed** card on the **Fundraising Dashboard**. You can either use the results given or use the filters to narrow your results. On the results window, click the button in the bottom left and select Mail Merge. The Mail Merge Bar will appear. After selecting a template, **Mark Thank You Sent on all records?** will appear. Check the box if you wish to mark the records as thanked, then if you run a search again they will not be included in the results. We recommend not marking the records thanked the first time, in case something happens with the merge. After successfully merging, then go back through the process and mark the records as sent.

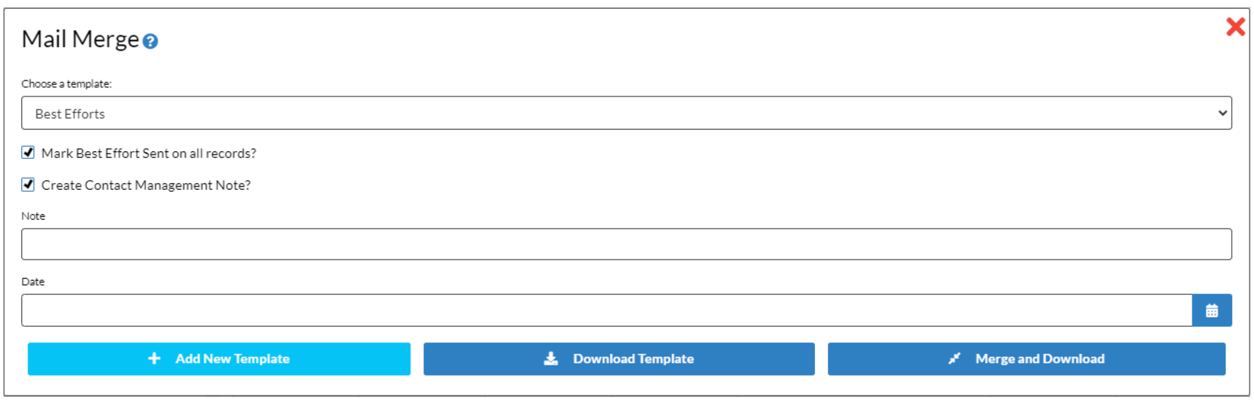


Here is a Thank You Template you can use to begin creating your Thank You letter. Please review carefully to ensure your letter is update with your organization's information.

Best Effort

To complete a Best Effort mail merge, use the **Best Effort** action button Run to run the list of itemized best efforts on the **Compliance Dashboard**. Select the Fund Code and then click Run. On the results window, click the ☰ ▴ button in the bottom left and select Mail Merge. The Mail Merge Bar will appear. After selecting a template, **Mark Best Efforts Sent on all records?** will appear. Check the box if you wish to mark the records as sent, then if you run a search again they will not be included in the results. If you check the box, another will appear asking **Create Contact Management Note?** If checked, two fields: note and date will appear for you to complete. This allows you to append a Best Effort Note to all to be merged records.

We recommend not marking the records sent the first time, in case something happens with the merge. After successfully merging, then go back through the process and mark the records as sent.



Here is a Best Effort Template you can use to begin creating your Best Effort letter. Please review carefully to ensure your letter is update with your organization's information.

Exception Codes

To complete an Exception Code mail merge, use the **Exception Code** action button Run on the **Compliance Dashboard**. From the Exception Letter window, select the Fund Code and Exception from the drop-down list in Step 1. Under Step 2, note if you want to create a contact management note. In Step 3, select the Mail Merge button. The Mail Merge Bar will appear. Here are several Exception Code Templates you can use to begin creating your Exception Code letters. Please review carefully to ensure your letter is updated with your organization's information.

Event Invitees List

To complete an Invitees mail merge, navigate to your event using the Event Dashboard. When you have opened the Event, click on the 

tab. From the page, you can filter the invitees using Status, Type, Check In, and CTD Total. When ready, select the Mail Merge icon in the bottom right. The Mail Merge bar will appear.