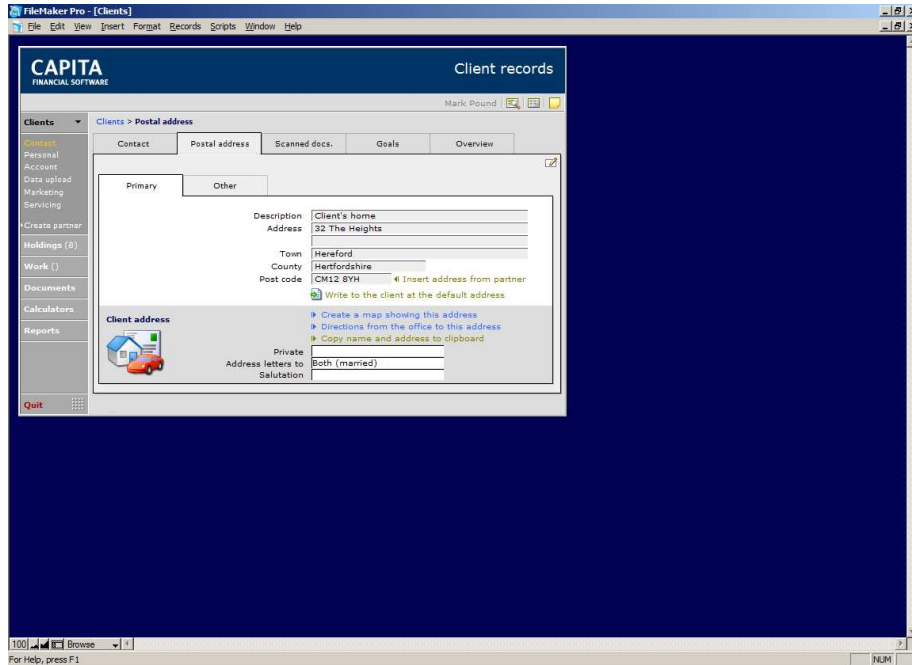


How can you send out Letters to Married Couples?

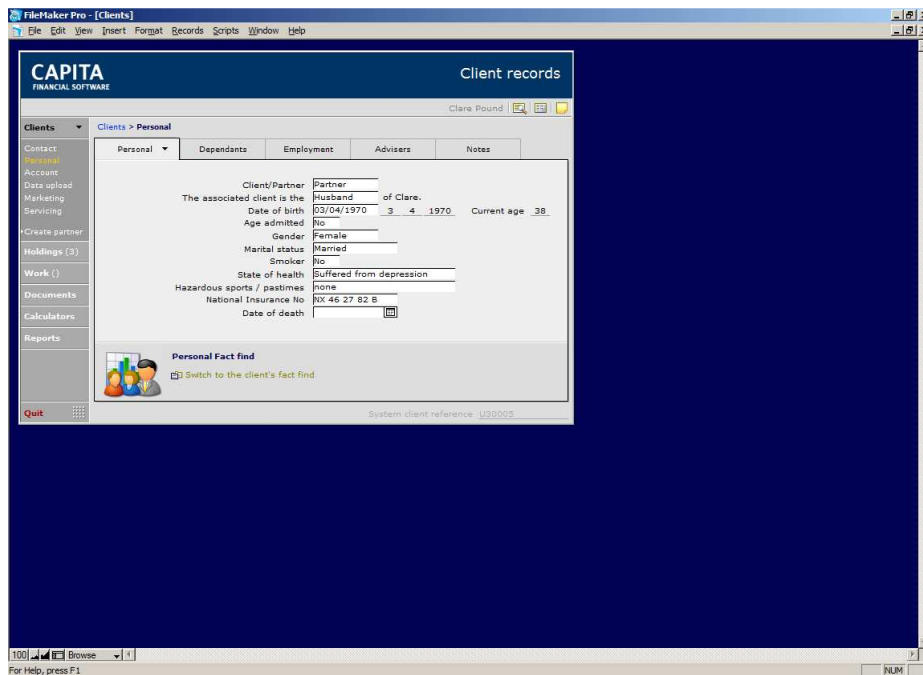
From the Front Screen select Clients and locate the relevant Client. Then select the Postal Address tab and within the Primary tab ensure that the 'Address letters to' field is set to 'Both married'.



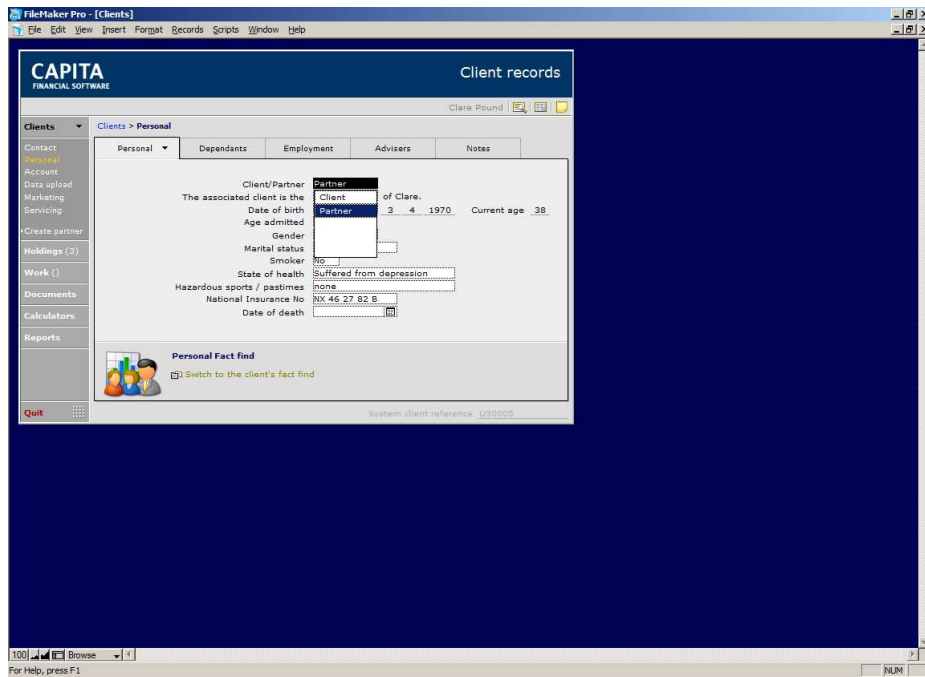
Then to create a found set of Clients to send the letter to, you will need to follow the below steps:-

To continue with the Mail Merge, select Personal from the menu to the left of the screen.

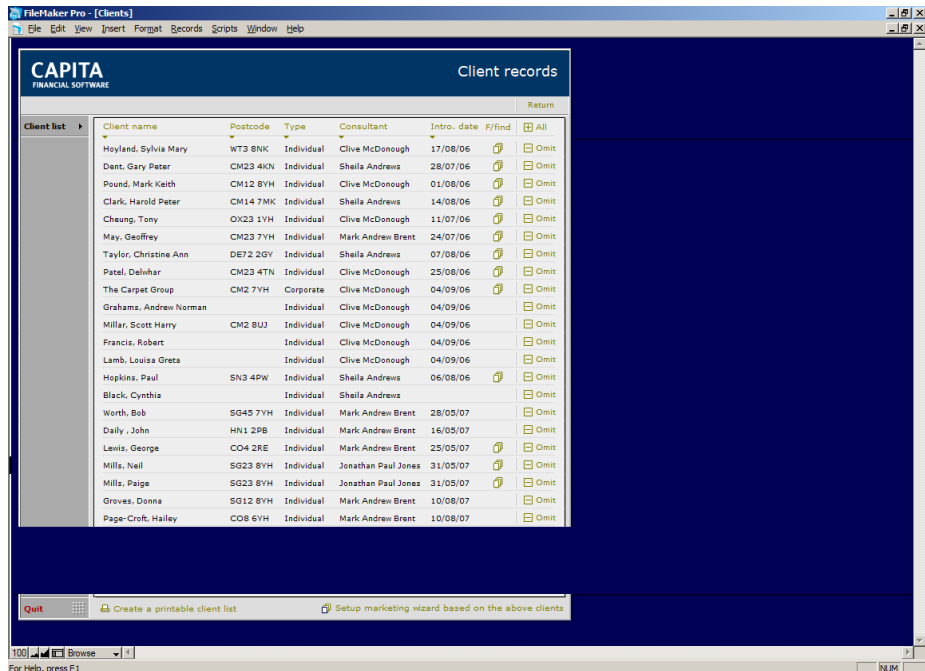
Change your 'Browse' button at the bottom of your screen to 'Find' (which will then clear the fields).



In the 'Client/Partner' field select Client and with your cursor flashing in the field hit enter.

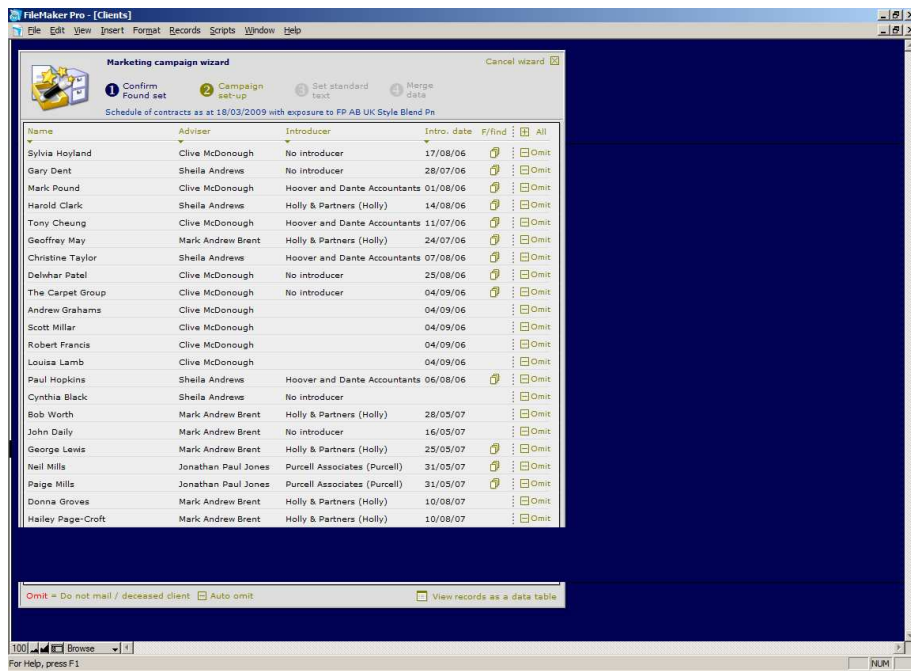


This will now give you your found set of Clients. Click on the middle button in the top right hand corner of the screen. This will bring up a list of the Clients records in the found set.



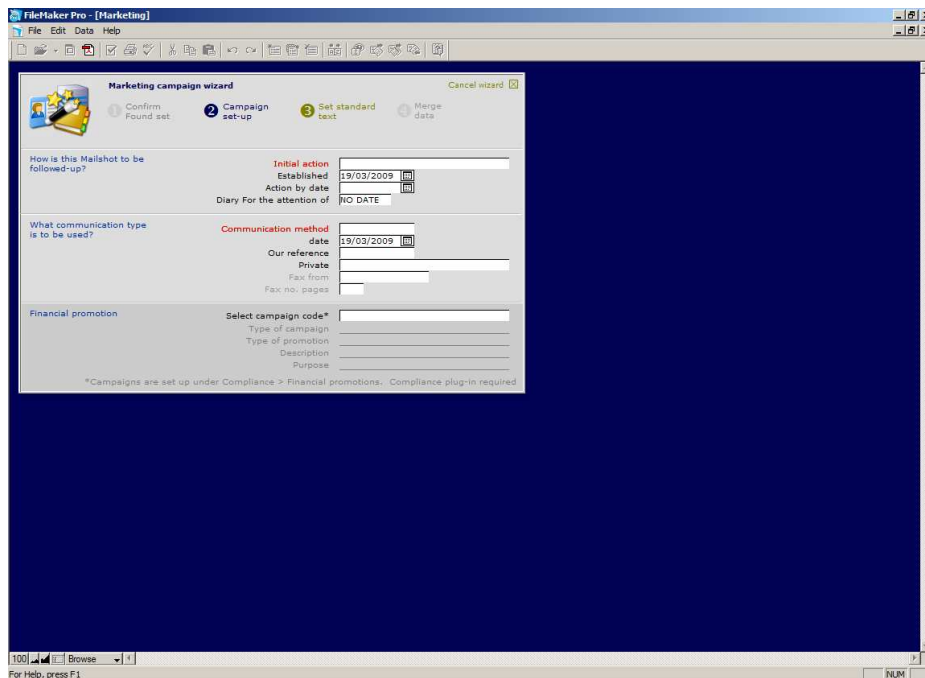
At the bottom right hand corner of the screen you will need to click on 'Setup marketing wizard based on the above clients'. A pop-up message will appear, click on yes to continue with the marketing campaign.

Now follow through the steps 2-4 at the top of the screen.



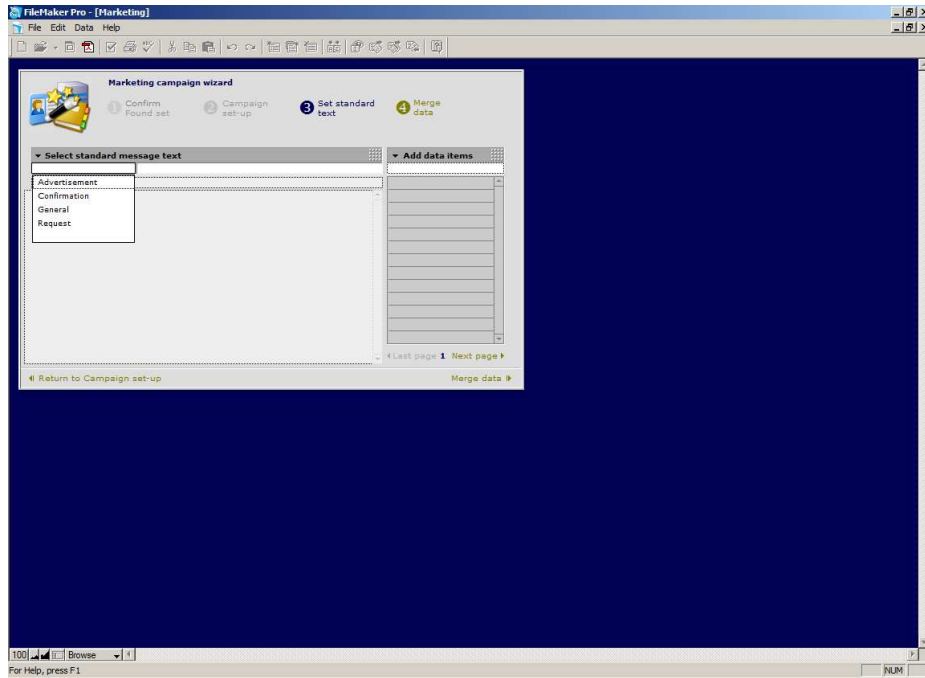
When you select option 2 you will get a pop-up message asking you to confirm, who you would like to create the marketing campaign for? Please select the 'Found set' button.

A 'Marketing records set-up' pop-up message will then appear advising you to complete the red highlighted fields before continuing. These fields must be completed before you can continue with the mail merge.

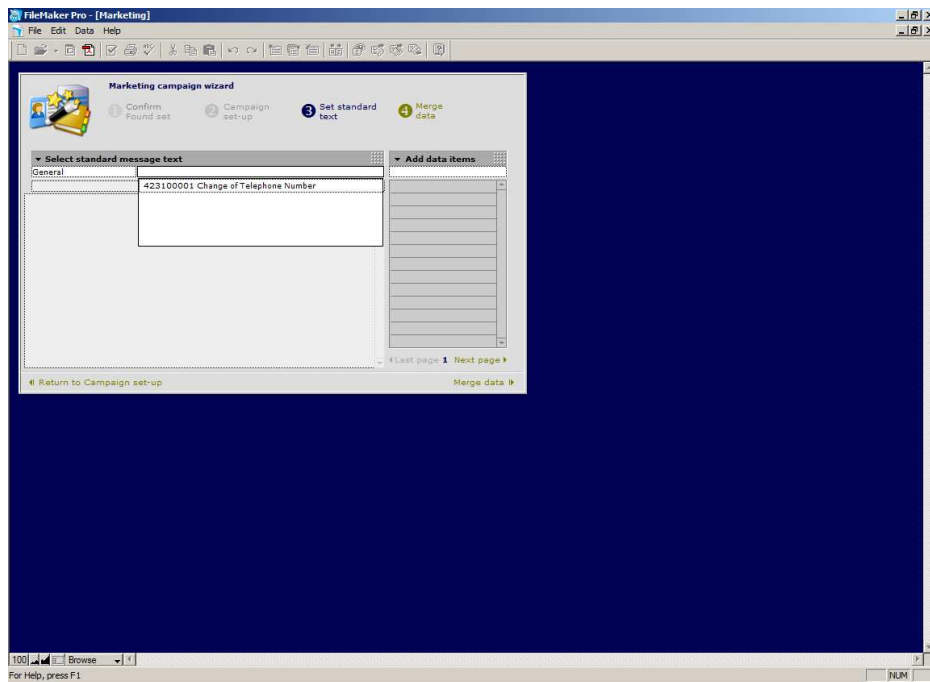


Once you have completed this, please select option 3. Here you must retrieve the letter that you have saved within setup-standard text.

First click into the drop down list and select the section that the letter was saved under.



Now click on the next drop down list and select your letter.



Now all that is left for you to do is to either click on option 4 'Merge Data' or click on the 'mail data' link at the bottom right of the screen.

A pop-up message will appear, asking you to confirm that you wish to 'Create marketing records on this set-up'.

Now select 'View Letter dated' and this show you the letters addressed to your married couples and clients without partners.