Mail Merges

How to create a contact event from a Mail Merge

There are three options for whether Contact Events are made when doing a mail merge to contacts. This is set up by your agency according to requirements.

They can be set to one of the following:

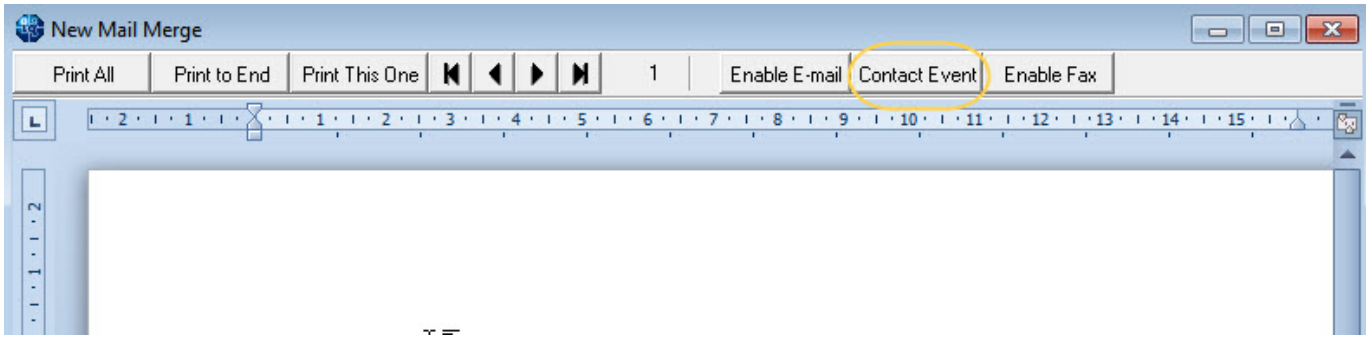
- Contact Event is automatically generated when doing a mail merge.
- Contact Event can be generated at the time of doing a mail merge.
- No Contact Event generated when doing a mail merge.

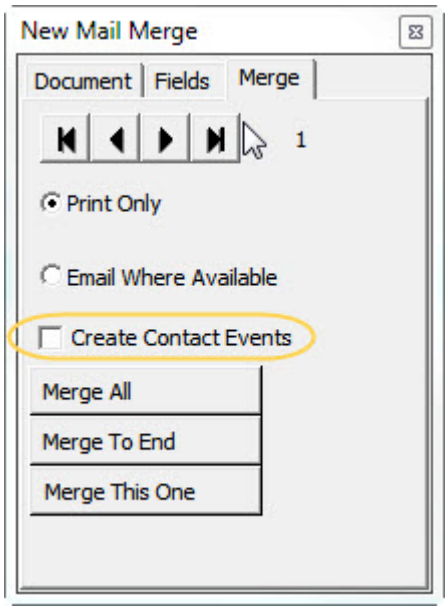
Automatically generated contact events

When you do a mail merge, a contact event will automatically be generated against each contact that the mail went to. The content of the mail merge will be saved in the Letter Text of the contact event.

Optionally generated on doing a mail merge.

When the letter is open, you will see a Contact Event button (depending on the version you are on this will show as one of the two views below.)





If you wish to create a contact event for each contact that received the mail merge, click on the Contact Event button. Then continue to send the mail merge as usual. The content of the mail merge will be saved under Letter Text on the contact event.

No Contact Event generated

When this option is selected there will be no contact event generated. To add a contact event subsequently, ensure the list of contacts is in the selector form by retrieving the stored selection. Go to the mail merge tab and click the contact event button, entering the relevant information for that contact event. It will be saved against each record in the selection.

NB. When creating contact events in this way, if you have used the options of 'send to only highlighted' or 'subscribed only' to filter the selection on point of doing your mail merge then the list on your selector will not accurately reflect who received the mail merge. It may include people who did not receive it and an erroneous contact event will be saved against their record.

See also 10.3 How to do a mail shot.

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