

# 11



## Mailings

A "mailing" is a letter that is sent to a list of addresses. In PRIMO, you can address a mailing to a person (mailings sent from a list of Contacts) or a company (mailings sent from a list of Organisations).

The difference between a mailing and an offer is described below:

- An offer is when you send a letter offering a property to client with an actual Requirement record in Primo.
- A mailing is when you send a letter (regarding any topic) to a list of addresses.

In the first case, the offer is created from the Property record that is being offered to one or more clients (cf. [section entitled "Matching Section", Chapter 3, "Properties", page 3-17](#) and [section entitled "Creating an Offer from the Property Record", Chapter 10, "Offers", page 10-5](#)).

In the second case you are sending out the same letter to a list of addresses. That letter may have enclosed with it a list of properties that are up for sale or rent.

Therein lies the difference: Mailings concern Contacts and Organisations addresses, while Requirements are normally handled by using Offers.

## Overview

Mailings are produced in three steps:

1. Create a layout for the mailing (cf. [section entitled "Understanding, Creating and Using Layouts", Chapter 13, "Layouts", page 13-3](#)).
2. Build a list of addresses or a "mailing list" (cf. [section entitled "Creating a List", Chapter 6, "Lists", page 6-6](#) and the following paragraphs).

➔ **Tip:**

You can use the same mailing list to print address labels (cf. [Chapter 12, "Labels"](#)).

3. Print the mailing (cf. [section entitled "Organisation & Contact Search and List Window Mailing Options", Chapter 6, "Lists", page 6-22](#)).

➔ **Tip:**

The first two steps are not as important as the third. For both steps, you can re-use existing lists and layouts in order to save some time. More about this in the following sections.

PRIMO offers different ways of putting together mailings:

*Example A:*

The mailing is going to specific people whose name and title you know and whose records already exist.

In this case, you would create a mailing list by using the *Contact Search and List window* and use a mailing layout that is linked to the Contact section of PRIMO. If you have chosen the correct layout and the address section of each Contact record in the mailing list has been properly filled in, then each letter will contain the correct address format and greeting (e.g. "Mr. James Browning" and "Dear James").

*Example B:*

A mailing is being sent to a list of companies for whom you do not have a list of contacts (this would particularly be the case with data obtained from a store-bought CD-ROM).

In this case, you would create a mailing list using the *Organisation Search and List window* and would use a mailing layout that is linked to the Organisation section of PRIMO. Since your list would not be linked in any way to a Contact, you would have to add to your layout an address format and greeting that could apply to everyone in the mailing list, and you could do this by using universal terms such as "Head of Department" and "Dear Sir/Madam".

➔ **Tip:**

For procedures or help on how to add data from a CD-ROM into the PRIMO database, contact Eisen & Partner GmbH.

*Example C:*

Most of the Organisation records you create will be linked to at least one Contact, but this is not always the case. So, if you prefer to send mailings to people and not organisations,

we suggest that whenever you create an Organisation record and you do not have a contact name for that record, add a Contact nonetheless, call that Contact "Dear Sir/Madam", then format the address and greeting fields appropriately (cf. [section entitled "The "No-Name" Contact", Chapter 2, "Organisations & Contacts", page 2-14](#)). This way, whenever you send a mailing to a list of Contacts, these "no-name" Contacts can be part of the list as well.

## Mailing Layouts

The layout type used for a mailing will contain merge fields especially created for this purpose (cf. [section entitled "Understanding, Creating and Using Layouts", Chapter 13, "Layouts", page 13-3](#)).

### Creating a Mailing Layout

To create a mailing layout proceed as follows:

1. Select "New Layout" from the PRIMO File menu.  
An empty word-processor document entitled "Document" will open.
  2. Enter an appropriate name for the mailing in the "Name" field.
  3. From the "Section" drop down list select whether the addresses for this mailing layout should be taken from the Organisation or the Contact section of PRIMO (see above).  
The merge fields that become available will depend upon the section you have selected.
  4. Select "Letters" from the "Type" drop down list.
  5. Before you begin typing your letter, you should format the document as you would like it to appear. To do this, select the "Document format..." and "Paragraph/Tabs" menu items from the word-processor File menu and fill in the fields accordingly (cf. [section entitled "Document Format...", Chapter 9, "Word-Processor", page 9-3](#) and the following paragraphs).
  6. Type the letter using merge fields any time they are useful (e.g. letterheads, address formats, greetings, etc.). For more information regarding merge fields see the [section entitled "Place-Holders", Chapter 13, "Layouts", page 13-6](#).
  7. Save the document.
  8. If you would like to test print the mailing, create a short mailing list and print the mailing without creating a History-Activity (the following section explains how to do this).
- ➔ **Tip:**  
You can also test a mailing layout linked to the Contact section of PRIMO by clicking on the "Letter" icon of an open Organisation record.

## Using an Existing Layout

You can simplify the entire process of creating a layout by using a previously created layout. There are several ways of doing this:

*Example A:*

✓ **Prerequisite:**

You have opened the Contact or Organisation “Letters” layout that you would like to copy.

1. Make a copy of the layout using the “duplicate” icon (cf. [section entitled “Duplicating an Existing Layout”, Chapter 13, “Layouts”, page 13-5](#)) and give the copied layout a new name.
2. Modify the layout as desired.
3. Proceed as described in the [section entitled “Creating a Mailing Layout” in this chapter, page 11-3](#).

If you wish to change a Contact “Letters” layout to an Organisation “Letters” layout, or vice versa, you must remember to exchange Contact merge fields such as “[Contact].Greeting”, “[Contact].Firstname” and “[Contact].Address” with the appropriate Organisation merge fields (cf. [section entitled “Examples of Mailing Layouts” in this chapter, page 11-5](#)).

*Example B:*

✓ **Prerequisite:**

You created a document in PRIMO and you used the “Save as...” option from the word-processor File menu to save the document onto your computer.

1. Create a new layout and insert the document into your layout by selecting “Insert text...” from the word-processor File menu.
2. Proceed as described in the [section entitled “Creating a Mailing Layout” in this chapter, page 11-3](#).

Make sure that all merge fields correspond with the section you are linking the layout to, or the merge fields will not merge.

*Example C:*

✓ **Prerequisite:**

You created a document using another word-processor (e.g. MSWord®).

1. Open the document in the word-processor you used to create it, select “Save as” from that word-processor’s File menu and select “RTF” as the save format.
2. Select “Insert text...” from the PRIMO word-processor File menu.
3. When the “Insert text...” window opens, change the selection in the “List files of type” drop down list to “Rich Text Format (\*.rtf)”.
4. Find the document you wish to insert into the layout, select it and then click on “OK”.

You may want to make some changes to the document once it is inserted into the layout.

5. Proceed as described in the [section entitled “Creating a Mailing Layout” in this chapter, page 11-3.](#)

➔ **Tip:**

Although RTF-Format is the best way to transfer formatted text from one word-processor to another, it can happen that a word-processor does not recognise all the formatting rules used by another word-processor.

As most word-processors use their own internal clipboard formats, using Copy-and-Paste (the “clipboard”) will only bring over raw text, no formatting.

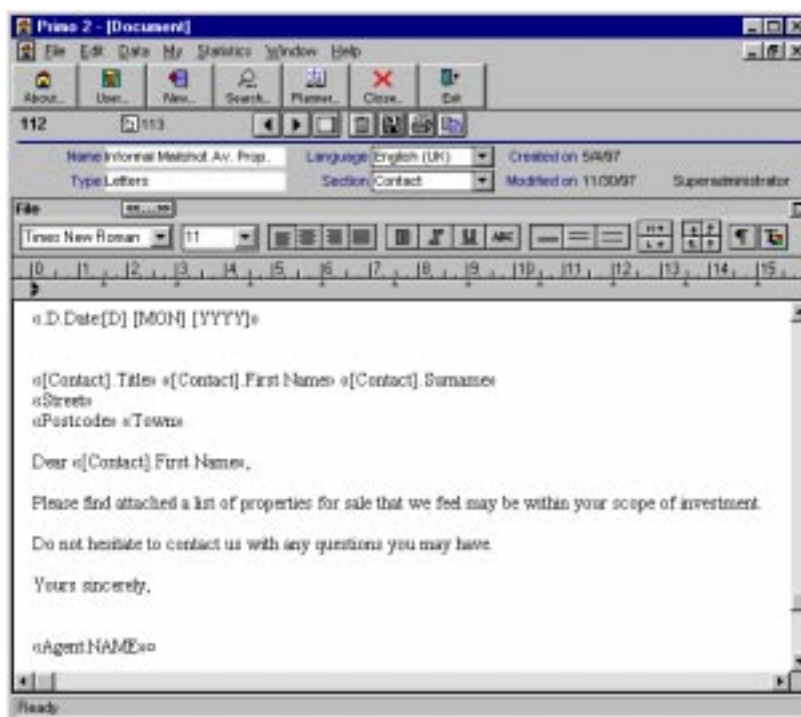
Any of the examples described above can be combined.

## Examples of Mailing Layouts

To better explain the differences between sending a mailing to a list of Contacts vs. a list of Organisations, we have created two mailing examples, one linked to the Contact section and one linked to the Organisation section of PRIMO.

*Example 1:*

Mailing layout linked to the Contact section of PRIMO with merge fields such as “[Contact].Address” and “[Contact].Greeting”.



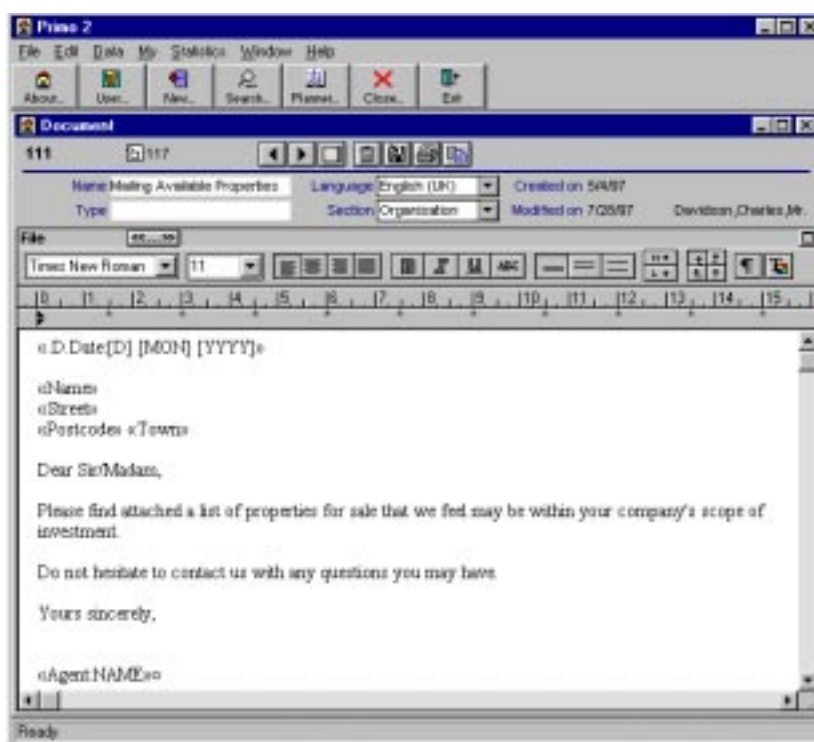
**Fig. 11-1:** A “Contact” Mailing Layout

**Important:**

Note that although the merge field “[Contact].Address” only takes up one line in the layout, once it is merged it will take up at least five lines in the document. You should, therefore, take that into consideration when formatting your layout, using page-breaks, if necessary.

*Example 2:*

Mailing layout linked to the Organisation section of PRIMO with merge fields such as “Name“, “Street“, “Postcode” and “City”.



**Fig. 11-2:** An “Organisation” Mailing Layout

→ **Tip:**

The only difference between the layout shown below and the one above is that the “Contact” merge fields in the above layout have been replaced with “Organisation” merge fields.

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## Mailing Lists

### Creating a New Mailing List

A mailing list is created by opening a *Contact* or *Organisation Search and List* window and conducting one or more searches. You must conduct the search using the *Search and List* window that applies to the layout you wish to use (e.g. *Contact Search and List* window for a "Contact" mailing layout).

To begin the search enter the appropriate search criteria. When entering search criteria to create your mailing list, you should ask yourself the following questions:

- What do all the addresses have in common?
- What does each group of addresses have in common?

In the latter case the mailing list must be created in several steps.

Once you have asked yourself the above questions, enter search criteria in one or more of the following fields:

- Postcode
- Town
- SIC.Code  
SIC.Description
- Mailcode (only applies to Contacts)

→ **Tip:**

It is always easier to create a mailing list by groups of Contacts, so it is important that mailcodes be properly applied to Contacts whenever a new Contact record is created (cf. [section entitled "Mailcode", Chapter 2, "Organisations & Contacts", page 2-13](#) and how to create mailcodes in the [section entitled "Modify Item Lists", Chapter 15, "Administration", page 15-20](#)).

1. Enter the search criteria in the search fields, using the "wild card" ("%") if necessary (cf. [section entitled "Search Criteria", Chapter 1, "Basic Functions", page 1-30](#)).
2. Create the mailing list as described in the [section entitled "Creating a List", Chapter 6, "Lists", page 6-6](#).



**Important:**

If you need to conduct more than one search to create your mailing list, do not forget to activate the "Add" checkbox, located under the "Search" button, after each search and before the next one.

3. Revise the list as explained in the [section entitled "Adding to and Condensing a List", Chapter 6, "Lists", page 6-12](#).
4. If you would like to print the mailing immediately, you should leave the *Search and List* window open.

5. If you do not plan to print the mailing immediately, save the mailing list by selecting "Save List to File" from the list pop-up menu ("triangle" icon). For further explanation see the [section entitled "Saving Lists", Chapter 6, "Lists", page 6-17](#).

To re-open the list and print the mailing at a later date, select "Open List" from the list pop-up menu (cf. [section entitled "Opening a List", Chapter 6, "Lists", page 6-19](#)). You should only save lists that can be re-used at a later date.

**Important:**

Be careful however: Records that are added to the database after you have saved a list will not be part of the list when you re-open it, even if they meet the search criteria you used to create the list. It might be more useful when dealing with mailing lists, to save search criteria instead of an actual list. The two alternatives are explained in detail in the [section entitled "Saving and Opening Search Criteria", Chapter 1, "Basic Functions", page 1-34](#).

## Merging and Printing Mailings

To merge and print a mailing, you will need:

- A mailing layout linked to the Contact or Organisation sections of PRIMO.
- A mailing list that you have created using the appropriate *Contact* or *Organisation Search and List window*.

The above steps are described in the previous sections of this chapter.

There are two ways of printing and merging a mailing. The way that applies to you will depend on whether your Program Administrator has enabled the "Mailing Assistant" option (cf. [Administration, "Additional Settings"](#)).

### Merging and Printing a Mailing Without the "Mailing Assistant"

✓ **Prerequisite:**

You have created a mailing layout and a mailing list.

If necessary, the mailing list has been saved to your computer.

There is enough paper in the printer.

1. Open a mailing layout by selecting "Open Layout" from the PRIMO File menu and selecting the appropriate layout.

Skip this step if the layout is already open.

2. Create a new mailing list or open a saved one by selecting "Open Saved List" from the PRIMO File menu, or selecting "Open List" from the list pop-up menu ("triangle" icon) of the appropriate *Search and List window* (cf. [section entitled "Opening a List", Chapter 6, "Lists", page 6-19](#)).

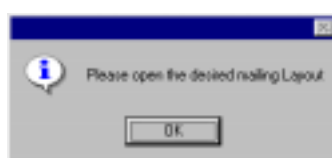
If the mailing list was opened before you went to open the mailing layout, go back to it. To do this select it from the PRIMO Window menu, or if you can see it in the background, click somewhere in the window (not on a button). This will bring the *Search and List window* to the foreground and reactivate it.

→ **Tip:**

The order of the above two steps are particularly important: You must make sure that the mailing layout is opened in the background (it may be minimised) and that the appropriate *Search and List window* is opened and active in the foreground.

3. Now that you are back in the *Search and List window*, click on the “mailing” icon (📧) located on the list toolbar.

If you do not have a mailing layout opened in the background, or if you have opened the wrong layout for the mailing you are trying to print, the mailing will not print and you will get a message such as the one below:



**Fig. 11-3:** Message: “Please open the desired mailing Layout”

Click on “OK”, open the correct layout and click on the “mailing” icon once more.

The PRIMO “Print document...” dialogue box will open: (For instructions on how to use the “Print document...” dialogue box, see [section entitled “Printing”, Chapter 1, “Basic Functions”, page 1-39](#))



**Fig. 11-4:** Dialogue Box: “Print document...”

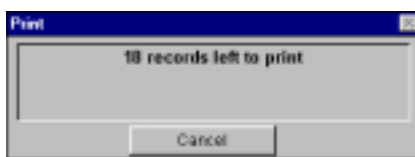
4. Enter the necessary information in the fields and click on “OK”.



**Important:**

If you wish to change the paper orientation or the printer you can do this by selecting “Page Setup” from the PRIMO File menu. Whenever you are dealing with print managers or dialogue boxes, you should only enter information or make selections if you know how the changes you make will affect this document and anything else you print from your computer.

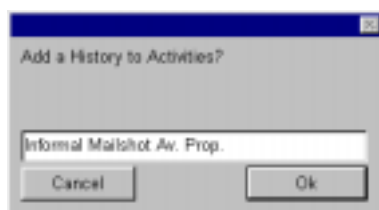
Once the mailing has started printing, the following message will appear:



**Fig. 11-5:** Message: "# of records left to print"

The message disappears once the printer has finished spooling and the printing job is complete (or if you click on "Cancel").

The following dialogue will now open to ask if you wish to create a History-Activity of the mailing:



**Fig. 11-6:** "Dialogue Box: "Add a History to Activities?"

This dialogue box lets you create a History-Activity of the type "Misc." and the kind "Mailing" for each address on the mailing list.

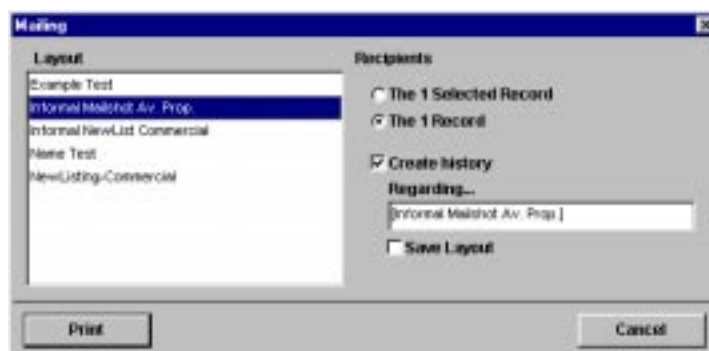
5. By default the name of the mailing layout you used will appear in the "Name" field. You may add to the name or replace it with a more appropriate one.
6. Click on "OK".

A History-Activity is created for each address you sent a mailing to. The name of the mailing will appear in the "Regarding" and "Remark" fields of the History-Activity record.

→ **Tip:**

If you do not wish to create a History-Activity, click on "Cancel".





**Fig. 11-8:** : Dialogue Box: “Mailing”

All the mailing layouts that apply to this *Search and List window* will be listed in the dialogue box.

3. Select the layout you wish to use and whether you wish to only print the records you have selected or all the records in the mailing list.
4. Next check if you wish to create a History of this mailing.

By default the name of the mailing layout you used will appear in the “Name” field. You may add to the name or replace it with a more appropriate one.

If you activate the “Create history” check-box an Activity will be created for each address you send a mailing to. The name you give the mailing will appear in the “Regarding” and “Remark” fields of the History-Activity record.

5. Finally, check whether you would like to save a copy of the mailing layout with the Activity. The layout will appear on *Page 2* of the History-Activity record that is created.
6. Click on “PRINT” (or click on “Cancel” to stop the whole process).

The PRIMO “Print document...” dialogue box will open: (For instructions on how to use the “Print document...” dialogue box, see [section entitled “Printing”, Chapter 1, “Basic Functions”, page 1-39](#))



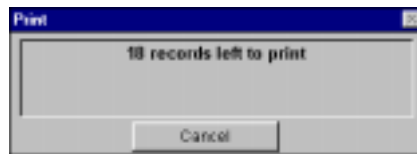
**Fig. 11-9:** Dialogue Box: “Print document...”

7. Enter the necessary information in the fields and click on “OK”.

**Important:**

If you wish to change the paper orientation or printer you can do this by selecting "Page Setup" from the PRIMO File menu. Whenever you are dealing with print managers or dialogue boxes, you should only enter information or make selections if you know how the changes you make will affect this document and anything else you print from your computer.

Once the mailing has started printing, the following message will appear:



**Fig. 11-10:** Message: "# of records left to print"

The message disappears once the printer has finished spooling and the printing job is complete (or if you click on "Cancel").