



TELOS  
SOFTWARE

## Premier Special Topics Cheat Sheet

### *Mailings & Exports*

- Exceed uses Object Linking & Embedding (OLE) to create paths (or links) to your letters in Microsoft Word
- The paths are stored in Application Setup under the Letters tab and under the specific letter type
- The standard letter types are Acknowledgements, Receipt, Ask, Gift List Merge, Mail Merge, Tributes, Pledge Reminders, Renewal Reminders, Envelopes, E-Mail and Name Badge
- If you have the Guest, Grant or Volunteer modules, there are letter types for those as well
- All Letter Types come with some fields in common (Name, Street 1, Street 2, etc), but contain different fields based on the specific Letter's function.
- You can create a letter from scratch or link to an already existing template.
- Acknowledgement letters are for any type of Thank you letter
- Acknowledgment letters can be run "on the fly," thru the Mailings screen or thru the Batch Maintenance screen
- Acknowledgement letters are the only type of letter that allows a letter code to be attached to a specific Acknowledgement letter
- Letter codes serve 3 functions
- The first function is to keep track of which letter was sent
- The second function is for merging "on-the-fly"
- The third function is merging through the mailings screen
- If your group of gifts include several different acknowledgment letters, you can print them all at the same time
- Receipt Letters are for Canadian clients to include multiple gifts in a single letter and that have the same receipt number.
- Ask letters allow you to create letters for your Campaigns
- Gift List Merge letters list up to 16 donations
- Mail Merge letters are meant for solicitation/appeal letters, as well as envelope and label templates
- Tributes letters are the type of letter that is sent to the person or persons that should be notified of donations received by your organization

- Pledge Reminders are to remind donors of their current and/or past due pledge payments
- Renewal Reminders are to remind members of their expired or expiring membership
- Envelopes allow you to create any type of envelope template that you want use
- Email allows you to create a letter template that you want to email from Word using Word's Merge to Email function
- Name Badge allows you to create name badges for your Events
- Never save a letter in a directory with a space in the name, e.g., My Documents, Program Files
- Should you move a letter outside of Exceed! from one place to another on your network, you can use Letter Path to establish the new letter path
- Deleting the letter path will not delete the letter, but will remove the path from Exceed!
- When creating a new letter it is important to let Exceed close Word down and create the path to the letter
- Most of the options in the Mailings screen under Letters and Labels relate to the different Bio and Gift letter types
- The Zip Code Report will give you the counts of each five-digit code and three-digit code to help you qualify for bulk mail discounts
- You can also send a Letter from the Address tab of the Master Biographical module by clicking on the Letter button
- The Letter Type used by the Letter button on the Address tab is Mail Merge
- A few export options under Export Files are for specific mailing products or services, such as Bulkmailer, CASS, E-mail Vertical Response, Givezooks!, Mail Vertical Response, Northwest Software and USPS Export
- You can export any fields you want using Custom Export
- The Tribute List creates an export file containing the name of the person(s), pet(s) or events being memorialized or honored, broken out by Tribute Type and followed by the list of people who made the donations
- The Size Category List Export creates an export file using data from the [Gift Size Table](#) and lists people who fall into each giving category
- E-mail Merge (accessed from the Mailings tab) allows you to send out mass email mailings

- E-mail Word Merge (also accessed from the Mailings tab) allows you to merge into an e-mail message using Microsoft Word
- Only records that meet your criteria *and* have a “valid” email address will be pulled for the Email Merge or Email Word Merge
- A “valid” email is one that is checked OK to Contact on the phones tab
- Once the email screen comes up, you can choose which emails to send to and you can modify the Name and email address of the recipient
- You can include more than one attachment to E-mail Merge emails
- When doing an E-mail Merge, you can globally add an action to the records that you are emailing and the body of the email will be inserted into the Comments of the action
- You can globally add an action to records that you are mailing, whether that mailing is for an appeal or reminder
- Any mailing can be saved as a Favorite mailing, whereby the program remembers the settings for the mailings, as well as the extraction criteria
- Favorite Mailings can be modified, deleted or added to another System Users Favorite Mailings list from the Organize Favorites option under the Favorites menu