

What is General Correspondence?

General correspondence in Ali CRM is used to record mass communications that are sent for advancement purposes to alumni, donors and friends of the University of Nebraska. This includes newsletters, magazines or other general mailings. It can be either physical mail or email. It is important to have these mass/bulk communications on constituent records as they are significant touchpoints and a measure of engagement. The Communications tab on individual and organization constituent records stores this information. There are several types of communication recorded on constituent records in Ali CRM.

Communications that would *not* be entered as general correspondence include:

- **Interactions and steps** — Personalized 1:1 direct communication that has unique messaging with a specific individual or small group should be entered as interactions. You can enter an interaction for a group by adding multiple participants to an interaction.
- **Event invitations** — Even small-group, event-related communications should be entered as an event invitation. See the Events Management Manual for instructions.
- **Appeal mailing** — *If a contribution card accompanies the mailing*, this should be entered as an appeal mailing. Please contact the foundation's Marketing Communications team: Kristi Pease (kristi.pease@nufoundation.org) or Joel Gehringer (joel.gehringer@nufoundation.org).
- **BBIS messages** — Emails sent with Blackbaud Internet Services (BBIS) do not need to be run as general correspondence as those messages are automatically posted to Ali CRM.

Do I Need a Merge Letter or Labels?

The general correspondence process allows you to create a Word™ document for a letter or mailing labels that can be mail-merged with fields from Ali CRM and self-printed. This mail-merged document is accessible from the general correspondence record so that users can see what was mailed.

However, the mail-merged document may not be required. If a mail-merged document does not need to be stored in Ali CRM, the general correspondence process is simpler to run. The communication still needs to be recorded on constituent records, but a *letter template* does not need to be selected and the *header file* does not need to be generated. An example of when the mail-merged document is not needed is Pride of Place magazine, where the actual mailing is printed and mailed by a vendor.

First Things to Know

- *The only items from the general correspondence process that display on constituent records are the **Correspondence code** (details) and the **Comments** specific to the correspondence process instance.*
- The date displayed on constituent records is the date the process was run, not the date of the mailing. So, make sure to run the general correspondence process as soon as possible after the mailing was sent. Selections can change between the time the list was generated and the time the process is run.
- Correspondence processes can be reused or rerun for different instances. Correspondence processes are created by site and type of mail piece. Names start with the organization abbreviation that the mail is

from, e.g., UNF, NAA, UNL LAW, UNO A&S or UNMC COD. More details may be entered in the Comments of the specific process instance, e.g., date sent, topic and audience. Examples of reusable correspondence process names are NAA Travel Email, UNKAA Email Event Invite and UNL Law Alumni Event Email.

- Correspondence codes are an even higher level of detail than the processes. Examples include NAA Travel, UNKAA Events, and UNL Law Email.

Instructions

These instructions walk through how to run general correspondence for these three different scenarios:

- A. First time running a new correspondence process
 - Create a new correspondence code
 - Create a new correspondence process
- B. Using an existing correspondence process for additional unique mailing instances
- C. Simplest scenario: using an existing correspondence process without a mail-merge document

A. First time running a correspondence process

1. Go to the **Marketing and Communications** functional area. Select **General correspondence** under the Donor relations task group. Go to the **Correspondence Codes** tab. Find the code that matches the communication piece you are sending. If one does not match, please email alicrm@nufoundation.org to have a new one created.
2. Go to the **Marketing and Communications** functional area. Select General correspondence under Donor relations. Go to the **Correspondence List** tab.
3. If not using this process to create a mail-merged document or to record what the actual mail piece looked like, skip this step and step 8 below.
 - a. Click **Generate header file** under Tasks in the left sidebar.
 - b. Select Output Type: Output format and Output format: Formatted mail correspondence output. Click OK.
4. Click **Add** next to the green Correspondence processes heading. After a Correspondence process is set up for the first time, it can be reused for different communications, dates and selections — *if the same output formats are used*. If you would like help setting up a Correspondence process, send an email to alicrm@nufoundation.org.
5. Fill in the **Name**. Keep it generic. No dates, no specific audience or segments. For example, “UNF WIN Member Letter.”
 - a. Correspondence processes should be created to be generic and reused for each specific mailing. The comments and selection (mail list) can be changed with each specific mailing or process instance. A record of each time a process was run is saved on the History tab.
 - b. A good example is “UNF Trustee Newsletter.” Each time this process is run, the comments can be updated to include the date and edition. But the saved process in the Correspondence List should be the generic “UNF Trustee Newsletter.”

- c. Do not create a separate process for each date or edition.
 - d. Do not create a separate process for each mail segment or audience list.
6. Fill in the **Description** of the process. The description should also be generic and static. For the UNF Trustee Newsletter example, “The Trustee Newsletter is published three times a year for trustees of the University of Nebraska Foundation following the meetings of the foundation’s board of directors.”
7. Select the appropriate **Site** that the correspondence is for. See the guide for Sites to help find the correct site to use. Click Sites within the **Administration** functional area to see a list of all sites.
8. If not using this process to create a mail-merged document or to record what the actual mail piece looked like, skip this step.
 - a. Select the letter template if using the Word file mail-merge to print documents with constituent merge fields. The Word file merge fields will need to be built with the header file that was generated and downloaded in step 3.
 - b. Select the mail labels file if printing mail labels.
 - c. For details on the Microsoft Word mail-merge process, use the help feature in Microsoft Word.
9. Select Output type: Output format. Select Output format: Formatted mail correspondence output.
 - a. Then click on the tiny pencil to the right of this setting.
 - b. Select the Address format: *NU – Standard Address Processing with Seasonal Addresses.
 - c. Select the Name format: Primary Name Format.
 - d. Make sure to *check both household boxes* so that the output is householded correctly.
10. Enter the Selected constituents as the exact **selection** name that your Prospect Research Analyst (PRA) gave you. Copy and paste the name as there are thousands of selections and some are very similarly named.
11. Make sure the **Update constituent record with correspondence detail** box is unchecked.
12. Select Save. Then select **Start process** from the Tasks menu in the left sidebar. When the process is complete, the **Recent status** tab will be displayed.
 - a. Select download output to see the mail list of constituents, addressee and salutation information as well as other output/merge fields.
 - b. If using a letter or label merge file, verify the output by clicking **View merged letter** and **View merged label** to make sure they are correct.
13. Repeat above steps 9-12 as necessary, adjusting the output types, address formats and name formats until the results run correctly.
 - a. If using a letter template or labels and the output fields do not work for your specific mail piece, contact your researcher or send an email to alicrm@nufoundation.org for other options.
 - b. Note that if a different output format is used, the Generate header file and Word template will need to be redone to match this format. The mail-merge process will only work if both the header file and output format match.

14. To run the final process and add to constituent records, click **Edit process** from the Tasks menu in the left sidebar. Check the **Update constituent record with correspondence detail** box.
15. Select the correspondence code as identified in step 1.
16. Fill in the **Comments** with the name, date the piece was mailed and audience. The Correspondence code (Details) and the Comments are the only things that will display on constituent records, although there is a hyperlink on the Communication column that will take users to this correspondence process record.
17. Click **Start process** under Tasks in the left sidebar. If this process was run in error, it can be deleted and will remove the communication from all constituent records. To delete general correspondence, send an email to alicrm@nufoundation.org.

B. Using an existing correspondence process for additional unique mailing instances

After a Correspondence process is set up for the first time, it can be reused for different communications, dates and selections — *if the same output formats are used*.

1. Go to the Marketing and Communications functional area. Select **General correspondence** under Donor relations. Go to the **Correspondence List** tab.
2. Identify the correspondence process to run. The naming convention for the correspondence process title is to list the campus first but *not* include the date or mail segment. Open the process record by clicking on the hyperlink of its name.
3. Click **Edit process** from the task list in the left sidebar.
 - a. Leave the title and description generic.
 - b. If not using this process to create a mail-merged document or to record what the actual mail piece looked like, skip this step. Update the mail template (Word file) and label template (Word file) for the specific mailing. You can use a snip (or screenshot) of the professional piece or copy the email into Word and use this as the merge letter template so that other users can see what was sent.
 - c. Click the pencil icon next to the Output format and make sure both checkboxes are marked to properly household the mailing.
 - d. Update the Selected constituents for the current mailing. If a dynamic selection is used that automatically updates for the mailing, a new selection may not be needed.
 - e. Uncheck the Update constituent record with correspondence detail box. Click Save.
4. Click **Start process** from the task list in the left sidebar.
 - a. When the process completes, click **Download output** and make sure the mail list and output fields are correct.
 - b. If using the merged letter template or label template, verify that the letter and labels are correct by clicking **View Merged Letter** and **View Merged Label**.
5. When the output looks correct, click **Edit process** again. This time check the **Update constituent record with correspondence detail** box.
 - a. Select the Correspondence code.

- b. Fill in the Comments with the name, date the piece was mailed and audience. The Correspondence code and the Comments are the only things that will display on constituent records, although there is a hyperlink on the Communication column that will take users to this correspondence process record.
 - c. The History tab shows all the outputs, merged letters and merged labels that were ever run for this process. All constituent record users can export the list of constituents who received each edition of the process by clicking Download output.
 6. Verify a specific constituent received a communication by going to their Communications tab and looking for General correspondence in the Communication column.
 - a. Note that more details are revealed by clicking the green chevron next to the record.
 - b. Click the hyperlink on the word General correspondence and it will take you to the specific correspondence process.

C. Simplest scenario: using an existing correspondence process without a mail-merge document

1. Go to the Marketing and Communications functional area. Select **General correspondence** under Donor relations. Go to the **Correspondence List** tab.
2. Identify the correspondence process to run. The naming convention for the correspondence process title is to list the campus first but not include the date or mail segment. Open the process record by clicking on the hyperlink of its name.
3. Click **Edit process** from the task list in the left sidebar.
 - a. Leave the title and description.
 - b. Click the pencil icon next to the Output format and make sure both checkboxes are marked to properly household the mailing.
 - c. Update the Selected constituents for the current mailing. If a dynamic selection is used that automatically updates for the mailing, a new selection may not be needed.
 - d. Uncheck the Updated constituent record with correspondence detail box to run the process to run the process as a test. Click Save.
4. Click **Start process** from the task list in the left sidebar. When the process completes, click **Download output** and make sure the mail list and output fields are correct.
5. When the output looks correct, click **Edit process** again. This time check the Update constituent record with correspondence detail box.
 - a. Select the Correspondence code.
 - b. Fill in the Comments with the name, date the piece was mailed and audience. The Correspondence code and the Comments are the only things that will display on constituent records.
6. Verify a specific constituent received a communication by going to their Communications tab and looking for General correspondence in the Communication column.
 - a. Note that more details are revealed by clicking the green chevron next to the record.
 - b. Click the hyperlink on **General correspondence** to go to the correspondence process.

Clean up items:

- Archive old correspondence processes and codes. Correspondence processes and codes that are no longer in use can be archived by marking them inactive. To see the full list of correspondence processes including the inactive, go to the Correspondence list, click **Filters** and check the box to **Include inactive**. To archive correspondence processes and codes that are no longer needed (and clean up the list), send an email to alicrm@nufoundation.org.
- You can delete a correspondence process and it will remove the mailing from the constituent records. You can also delete a specific correspondence process instance from the History tab. Please email alicrm@nufoundation.org to request a correspondence process or instance be deleted.

Definitions

Correspondence codes — With correspondence codes, you can categorize general correspondence in a way that is meaningful. For example, you can create correspondence codes to indicate the purpose of correspondence.

Correspondence list — From the list of current correspondence processes. From the list, you can perform multiple tasks to manage your correspondence processes.

Header file — From the General Correspondence functional area, you can generate header files for Microsoft Word documents that include merge fields and are associated with your correspondence. With the header files, the program can export the selected data fields and merge them with the merge fields in the Word documents when you generate the correspondence output. The header file is only used for the mail merge within Microsoft Word, so if a merge letter or labels are not required, the header file is not needed.

Correspondence process — You can create correspondence processes for communications sent to constituents. This will automate standard processes, such as the collection of data for mail merges and mail lists.

Recent status — To view information about the most recent instance of the process, select the Recent Status tab. On this tab, you can view the current status of the process to determine whether it completed successfully. You can also view the total number of records processed, how many of those records processed successfully and how many exceptions it generated. On the tab, you can download a comma-separated value (*.csv or *.xlsx) file of the most recent correspondence output.

History — To view information about the previous instances of the process, select the History tab. On this tab, you can view records of the previous instances the process was run. For each instance, you can view the total number of records processed. On the tab, you can download a comma-separated value (*.csv or *.xlsx) file of a previous correspondence output.