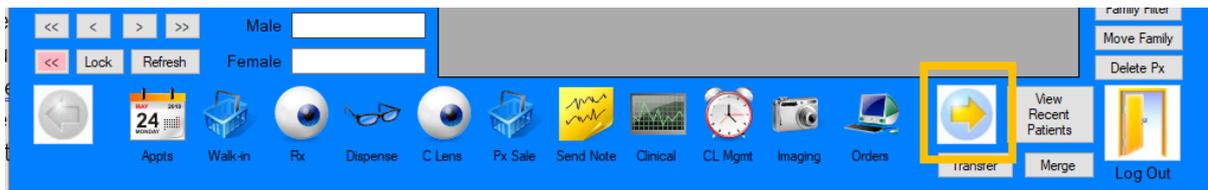
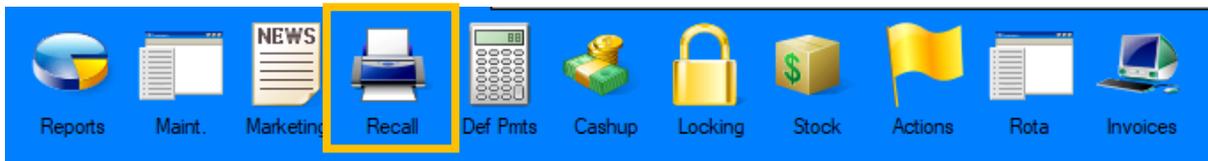


To access the marketing module, click on the yellow arrow on the right-hand side of the module icons at the bottom of the page.



This will display a new set of icons.

Click on the new icon called 'Marketing'



Uses of the Marketing Module

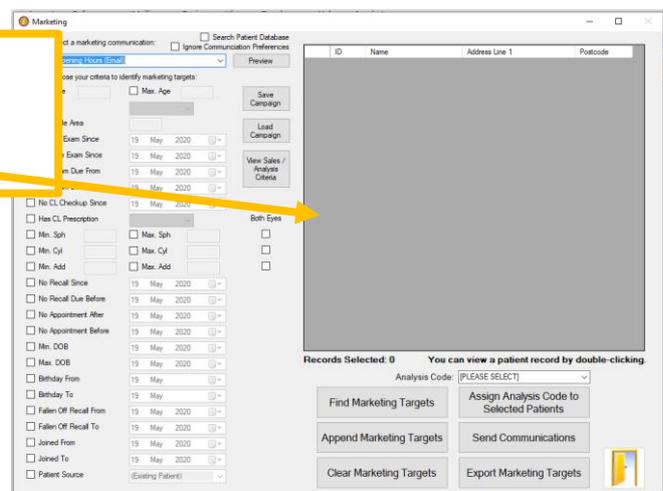
By default, when you open the marketing module it is set to marketing mode which means it will only list and communicate with patients that have the appropriate communication preferences.

You will need a marketing communication set up to use the module in marketing mode. (see page 16)

- If a letter communication is selected, then all patients with an address will be shown in the marketing targets list

The list of patients who match the filters and communication preferences are considered 'Marketing Targets' and will be listed here.

- If an email communication is selected, then only patients who have an email with the communication preference 'Yes' selected to the option 'Email news updates' will be listed. (Email news updates is an option on the front tab of the patient record.)



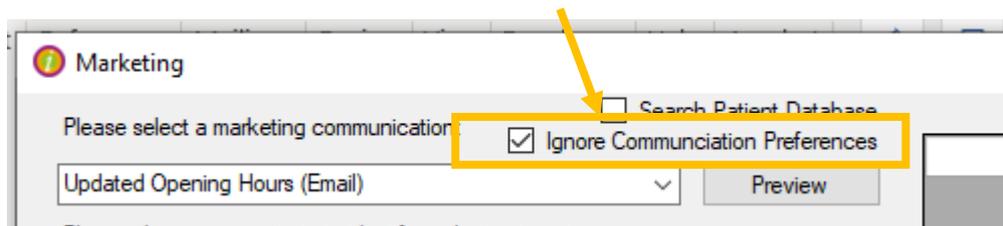
Email News Updates

Yes

- If an SMS communication is selected, then only patients who have an SMS with the communication preference 'Yes' selected to the option 'Contact by SMS?' will be listed (Contact by SMS is an option on the front tab of the patient record.)

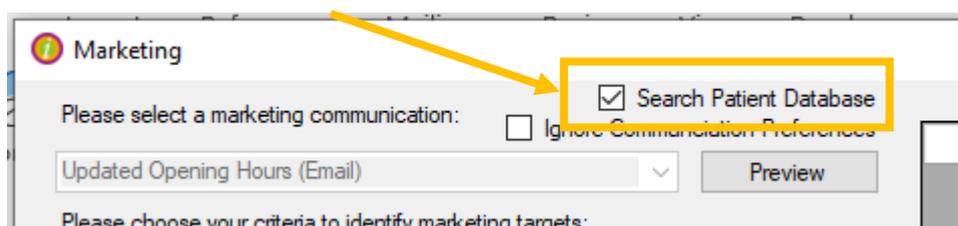


To use the marketing module to send an information communication to all your patients and ignore the marketing communication preferences then tick the box at the top of the screen called 'Ignore Communication Preferences'



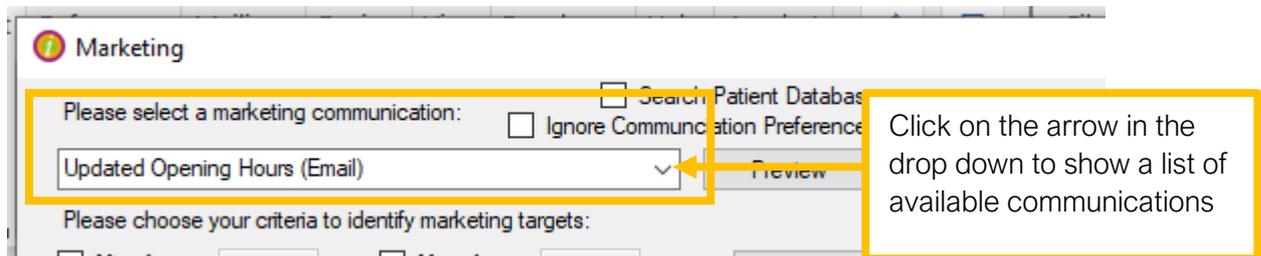
- If a letter communication is selected, then all patients with an address will be shown in the marketing targets list
- If an email communication is selected, then patients who have an email with either the communication preference 'Yes' or 'No' selected to the option 'Email news updates' will be listed.
- If an SMS communication is selected, then patients who have an SMS with either the communication preference 'Yes' or 'Recall Only' selected to the option 'Contact by SMS?' will be listed.

Researching your patient database. You can also use the marketing module to research your patient database and see how many and which types of patients fall into different demographic selections. To ignore all communication preferences and search the patient database tick the 'Search Patient Database' box. All patients will be included in the list.

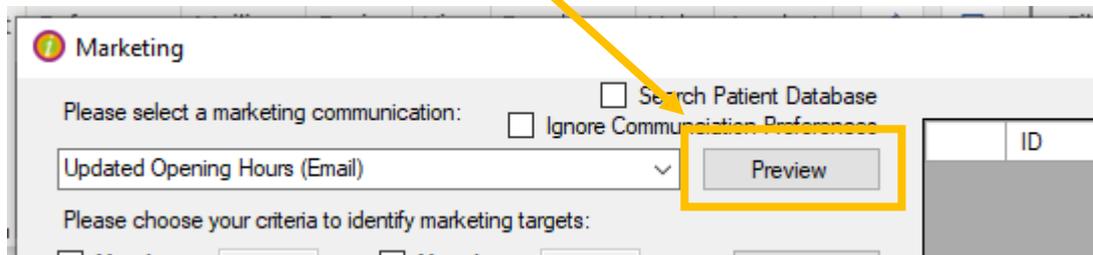


Selecting a communication

The available marketing communications that can be sent from module are listed in the drop down at the top of the screen.



Clicking the 'Preview' button next to the drop-down list will show a preview of the communication that is going to be sent.



Filtering the Marketing List

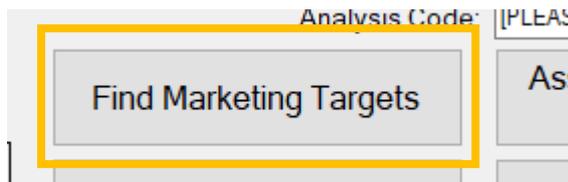
The criteria available down the left-hand side allow you to use your patient demographic information to create a targeted marketing list.

The screenshot displays the 'Marketing' module interface. At the top, there are options to 'Search Patient Database' and 'Ignore Communication Preferences'. Below this, a dropdown menu shows 'Updated Opening Hours (Email)' and a 'Preview' button. The main section is titled 'Please choose your criteria to identify marketing targets:' and contains a list of criteria with checkboxes. A yellow box highlights the left-hand side of this list, and an arrow points to the 'Gender' checkbox. A text box explains: 'Ticking the box next to a criteria will activate it in the demographic search and allow you to add a value to the search'. Below the criteria list, there are buttons for 'Save Campaign', 'Load Campaign', and 'View Sales / Analysis Criteria'. A yellow box highlights the 'View Sales / Analysis Criteria' button, with an arrow pointing to a second screenshot. This second screenshot shows a 'View More Criteria' button and a list of criteria. A yellow box highlights the bottom section of this second screenshot, which shows two columns of analysis codes: 'Has these analysis codes:' and 'Has none of these analysis codes:'. Each column contains a list of codes with checkboxes, including '100% Optical 2018', '100% Optical 2019', 'AIO', 'Beta Site', and 'BML Rep - CG'.

Criteria Field name	Details of calculation of criteria
Postcode area	Looks at patient's postcodes starting with this value (e.g. CF or CF1)
No eye exam since	Looks at patients most recent prescription date not counting re-test, non-sight-test, and non-sight-test-valid-rx.
Has eye exam since	Looks at patients most recent prescription date not counting re-test, non-sight-test, and non-sight-test-valid-rx
Eye exam due from	Looks at the next due date of a patients most recent prescription, not counting re-test, non-sight-test, and non-sight-test-valid-rx
Eye exam due to	Looks at the next due date of a patients most recent prescription, not counting re-test, non-sight-test, and non-sight-test-valid-rx
No CL checkup since	Looks at the patients most recent CL prescription of any type (unless created from the trials form and not brought through to CL rx)
Has CL prescription	Looks at patients with any CL prescription of any type (unless created from the trials form and not brought through to CL rx)
Min sph	Patients most recent prescription not counting re-test, non-sight-test, and non-sight-test-valid-rx
Max sph	Patients most recent prescription not counting re-test, non-sight-test, and non-sight-test-valid-rx
Min cyl	Patients most recent prescription not counting re-test, non-sight-test, and non-sight-test-valid-rx
Max cyl	Patients most recent prescription not counting re-test, non-sight-test, and non-sight-test-valid-rx
Min add	Patients most recent prescription not counting re-test, non-sight-test, and non-sight-test-valid-rx
Max add	Patients most recent prescription not counting re-test, non-sight-test, and non-sight-test-valid-rx
No marketing since	Will only include patients in the list that have not received a marketing communication since the specified date, looks at the patient communication tab and the communications sent and marked as marketing and not part of a recall scheme
No specs purchased since	Looks for patients that have not had a transaction with a 'SPECS' reference since the specified date
Specs purchased since	Looks for a patients that have had a transactions with a 'SPECS' reference since the specified date
Purchased specs costing between	Looks for patients who have had transactions with a 'SPECS' reference that have a value between the amounts entered

Purchased sunspecs costing between	Looks for patients who have had transactions of a product group of Sunspecs with a value between the amounts entered
Purchased products from supplier	Looks for patients who have transactions of a product that is linked to the supplier entered
Purchased products called	Looks for patients who have transactions with a product description containing the text entered
Purchased products from range	Looks for patients who have transactions of a product where the product range contains this text
Has these analysis codes	Patient has this analysis code selected. If more than one analysis code is selected in this box then the patient has to have all the codes to be included in the marketing target list.
Has none of these analysis codes	Patient is excluded of that marketing target list if they have any of the selected codes assigned.
No recall since	No recall communications sent to the patient since the specified date
No recall due before	Patient has no unsent recall communications due to go before this date
No appointment after	Patient has not appointments booked after the entered date. Looking at the appointment diary for all branches.
No appointment before	Patient has not appointments booked before the entered date. Looking at the appointment diary for all branches.
Fallen off recall from	Patient's recalls aren't stopped, there's no recall communication due to be sent, the last recall was sent on or after this date, and the patient has no appointment booked today or in the future
Fallen off recall to	Patient's recalls aren't stopped, there's no recall communication due to be sent, the last recall was sent on or before this date, and the patient has no appointment booked today or in the future
Joined from	Looks for patient records who have a join date (auto created on further details tab of patient record) after the entered date
Joined to	Looks for patient records who have a join date (auto created on further details tab of patient record) before the entered date
Patient source	Patient has the selected patient source option on selected on their patient record (further details tab)

Once you have selected all your relevant criteria. Click the button 'Find Marketing Targets'



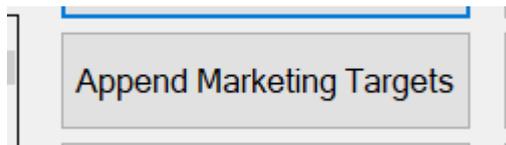
Clicking this button will search your patient database for patients whose demographics fit the selected criteria.

Once complete the marketing targets will be listed in the box on the right hand side and the number of patients listed will be shown just below.

A screenshot of a software window titled 'Patient Database Preferences'. On the left side, there is a vertical menu with buttons: 'Review', 'Save Campaign', 'Load Campaign', 'View More Criteria', and 'Both Eyes' (with three checkboxes). The main area contains a table with the following columns: ID, Name, Address Line 1, and Postcode. The first row is highlighted in blue. Below the table, it says 'Records Selected: 198' and 'You can view a patient record by double-clicking.'

ID	Name	Address Line 1	Postcode
9	Ben Thomas-Davis	36 Dan Y Bryn Avenue	CF15 8AH
2081	Jonathan Khan	9 Bryn Coed	CF15 9SD
2884	Anna Sommers	10 Plas Y Mynach	CF5 6HT
2886	Mabon Jones	1 Edward Clarke Close	CF15 8GB
2892	Lucy Sykes	5 Windsor Road	CF5 2RW
2895	Leo Matthews	19 Ael-Y-Bryn	CF1 8DJ
2927	Joshua McCusker	49 Bryn Derwen	CF15 8GA
2932	Lily-May Hughes	Cheriton	CF15 8SW
2952	Milo King	Px Booked via Eyecare Plan	CF15 7PX
2981	Ella Simpkin	18 Station Road	CF15 8FL
3036	Jacob Kerswill	1 Regent Gardens	CF15 8ET
3039	Dylan Matthews	84 De Clare Drive	CF15 8GA
3117	Olivia Kidd	70 Cwrt Pen Y Bryn	CF15 8GA
3185	Anes Hary	41 Heol Berry	CF5 6HR
3193	Mia Price	Flat 2, 38 Richmond Road	CF15 8SW
3237	Brooke Olah	57 Dongola Road	CF15 8SW
3250	Evan Pughe	16 St Peters Road	CF15 8GA
3268	Hafren McNamara	6 Gillian Road	CF15 8FN
3309	Tia Barker	3 Heol Y Bont	CF15 9HJ
3356	Lilly Rose Chamberlain	67 Harriet Street	CF38 2JH
3365	Imogen Duddridge	22 Clive Road	CF15 8AE

Append Marketing Targets



The append marketing targets button allows you to create one marketing target list from two different sets of criteria.

Select your first set of criteria and click find marketing targets, this will generate a list of patients who fit the search. Then reselect the criteria for your next search and click append marketing targets. This will add the new list of patients to the original list, creating one set of marketing targets to send communications to.

This feature is especially useful when using the analysis code criteria to select patients.

If you are trying to create a target marketing list of patients who have one analysis code OR another analysis code, you will need to use the append marketing targets button.

This is because if more than one analysis code is selected at the same time when you click find marketing targets, only the patients who have all these codes assigned to their record will be listed as marketing targets.

To create a list of marketing targets that have at least one of the required codes assigned to their record, select one analysis code only, then click find marketing targets. Then untick your original selection and tick the other analysis code you would like to search, now click append marketing targets to add the patients from this search to the marketing target list. You can repeat this process as required.

Sending Marketing communications

To send the selected communication to the patients in the marketing target list, click the send communications button.

The screenshot shows the Marketing module interface. A callout box labeled "Selected communication" points to the dropdown menu showing "Updated Opening Hours (Email)". Another callout box labeled "Marketing Target List" points to a table of patient records. A third callout box labeled "Send Communications Button" points to the "Send Communications" button in the bottom right area.

ID	Name	Address Line 1	Postcode
9	Ben Thomas-Davis	36 Dan Y Bryn Avenue	CF15 8AH
2081	Jonathan Khan	9 Bryn Coed	CF15 9SD
2884	Anna Sommers	10 Plas Y Mynach	CF5 6HT
2886	Mabon Jones	1 Edward Clarke Close	CF15 8GB
2892	Lucy Sykes	5 Windsor Road	CF5 2RW
2895	Leo Matthews	19 Ael-Y-Bryn	CF1 8DJ
2927	Joshua McCusker	49 Bryn Derwen	CF15 8GA
2932	Lily-May Hughes	Cheriton	CF15 8SW
2952	Milo King	Px Booked via Eyecare Plan	CF15 7PX
2981	Ella Simpkin	18 Station Road	CF15 8FL
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3039	Dylan Matthews	84 De Clare Drive	CF15 8GA
3117	Olivia Kidd	70 Cwrt Pen Y Bryn	CF15 8GA
3185	Anes Hary	41 Heol Bery	CF5 6HR
3193	Mia Price	Flat 2, 38 Richmond Road	CF15 8SW
3237	Brooke Olah	57 Dongola Road	CF15 8SW
3250	Evan Pughe	16 St Peters Road	CF15 8GA
3268	Hafren McNamara	6 Gilian Road	CF15 8FN
3309	Tia Barker	3 Heol Y Bort	CF15 9HJ
3356	Lilly Rose Chamberlain	67 Harriet Street	CF38 2JH
3365	Imogen Duddridge	22 Clive Road	CF15 8AE

After clicking the 'send communications' button the following pop up will appear.

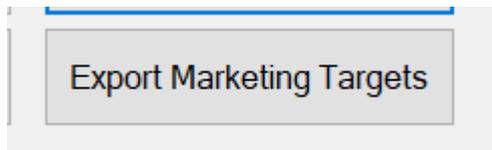
The screenshot shows a "Send Marketing" dialog box with a question mark icon and the text "Are you sure you want to send these marketing communications?". Below the question are "Yes" and "No" buttons. To the right, text reads: "After clicking yes, please wait while i-Clarity sends the communications or creates the marketing letters." Below the dialog box, a message box says: "This operation may take a few moments. Please wait while your communication is generated."

Once complete you will be shown a message to advise the process has been completed.

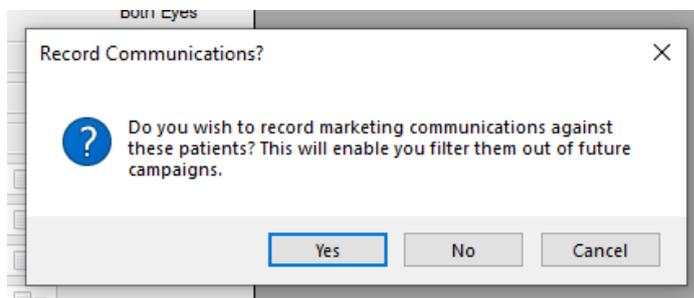
Exporting Marketing Targets

The other option to sending communications directly through i-Clarity is to export the marketing information into a spreadsheet and use this information external to i-Clarity to send the communications.

Once you have generated your list of marketing targets click the 'Export Marketing Targets' button.



Once you have clicked the 'Export Marketing Targets' button you will be presented with the following message.

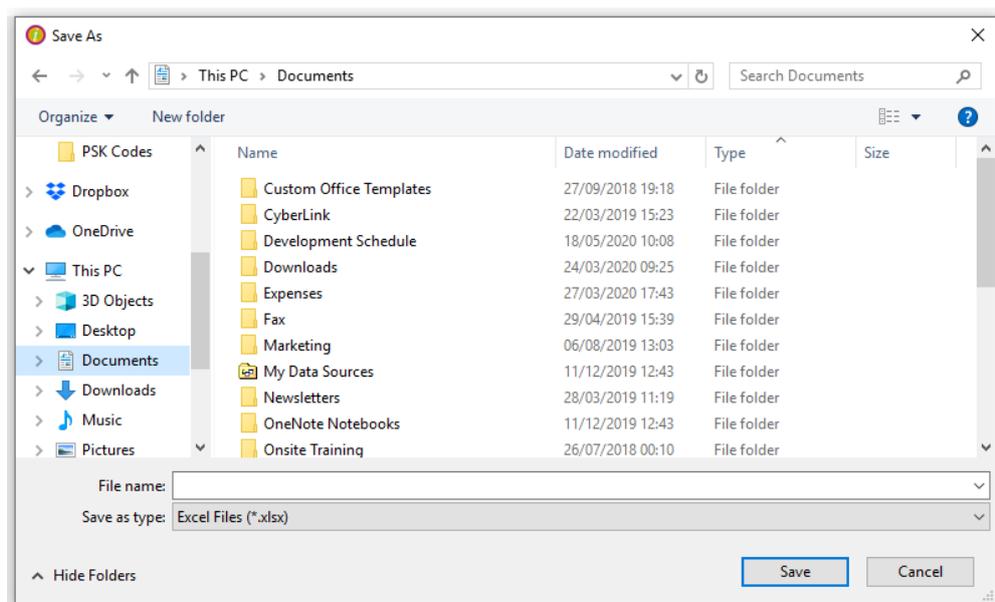


When you send a marketing communication through i-Clarity it gets recorded on the communications tab of the patient record so that you can use the 'No Marketing Since' feature effectively. If you are exporting the list there is no communication to record, therefore i-Clarity gives you the option

to record the export so you can still effectively use this criteria (No Marketing Since).

Clicking Yes or No to this message will move you on to the next step.

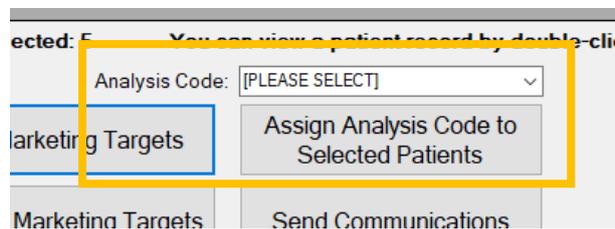
A windows explorer window will open allowing you to choose a location to save the excel document and create an appropriate name for your file.



Once the excel file has been created it will automatically open for you to view.

Marketing and Analysis Codes

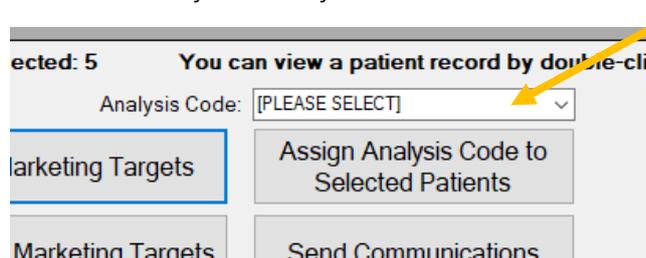
There is a feature within the marketing module that allows you to assign an analysis code to the patients listed as marketing targets.



Firstly, make sure the analysis code you want to assign to the patients is on the system.

If it is not, then an analysis code can be added to the system in the maintenance module and the analysis code tab.

Once you have created the list of marketing targets using the search criteria in marketing, select the analysis code you would like to add to their record from the Analysis code drop down.



Once selected click the 'Assign Analysis Code to Selected Patient' button, this will assign the analysis code to all the patients in the marketing target list.

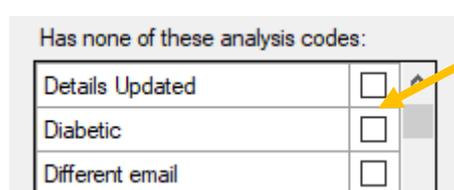
Examples/Ideas.

- You could use this feature to categorise your patients into different spectacle spend groups and then apply an analysis code to their record e.g. Gold Patient, Silver, Bronze. This analysis code would then be on the front of the patient record to alert i-Clarity users of the spend level of this patient.
- If you are sending a lot of communications through the marketing module and you want to prevent some communications being sent to patients who have had similar marketing but not prevent all patients from receiving two or more marketing communications, the criteria 'No Marketing Since' maybe too generic.

You can create an analysis code for each of the marketing communications you are sending in maintenance. Before sending your marketing communication you can apply this related analysis code to all the patients in the marketing target list.

This means that if required you can prevent patients who have received a specific type of marketing communication from appearing in the marketing target list of another campaign.

To prevent these patients appearing in the marketing target list, tick the box next to the analysis code in the box titled 'Has none of these analysis codes'



- The 'Has none of these analysis codes' feature is also useful to prevent of sending a duplicate communication to a patient. For example you may have a communication that you want to send to a large list of marketing targets but you want to do it in smaller groups over a period of time rather than all in one go.

Apply an analysis type to all patients listed in the smaller group before sending.

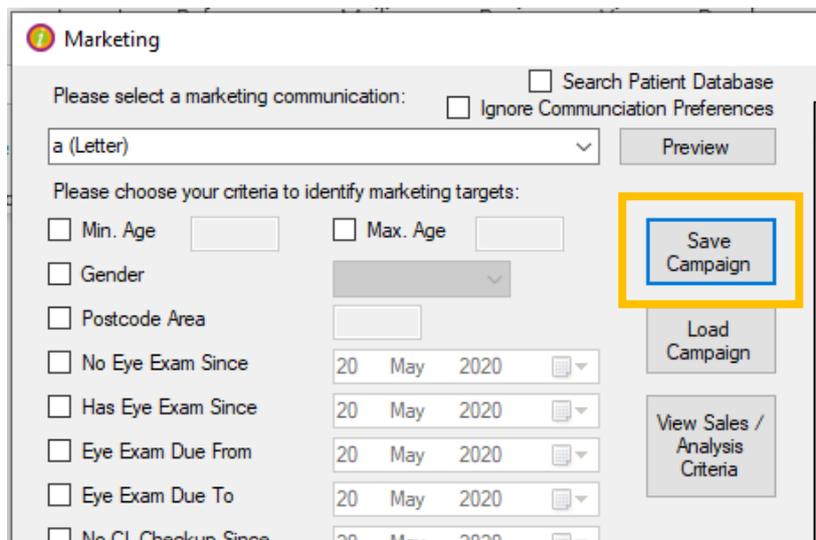
When sending the next small group select the applied analysis type from the 'Has none of these analysis codes' before clicking find marketing targets to ensure you do not send a duplicate to a patient. Then before sending apply the analysis type to the next group of patients.

Campaigns

A campaign is thought of as a selection of criteria. If you feel there is a certain selection of criteria that would be useful to use again in the future or on a regular basis then you can save a campaign. This eliminates the need for manual selection of criteria again in the future.

Saving a Campaign

Once you have selected all the required criteria, click on the 'Save Campaign' button.

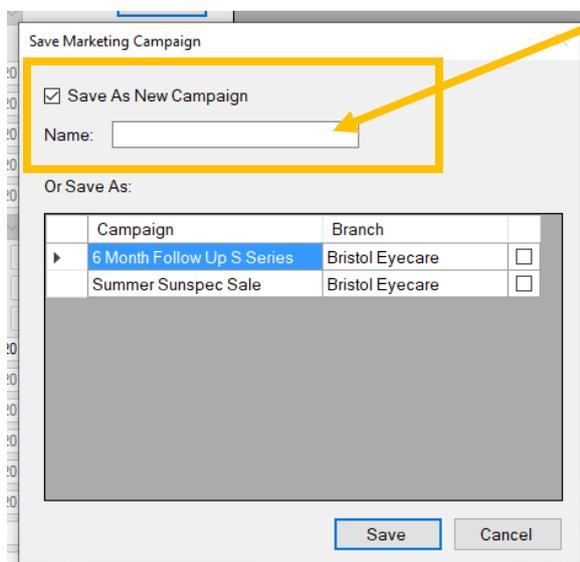


The screenshot shows a 'Marketing' window with the following elements:

- Buttons: Search Patient Database, Ignore Communication Preferences
- Dropdown: 'a (Letter)' with a 'Preview' button to its right.
- Section: 'Please choose your criteria to identify marketing targets:'
- Criteria list (all unchecked):
 - Min. Age: [] []
 - Max. Age: [] []
 - Gender: [] []
 - Postcode Area: [] []
 - No Eye Exam Since: [] 20 May 2020 []
 - Has Eye Exam Since: [] 20 May 2020 []
 - Eye Exam Due From: [] 20 May 2020 []
 - Eye Exam Due To: [] 20 May 2020 []
 - No Cl. Checkup Since: [] 20 May 2020 []
- Buttons on the right: 'Save Campaign' (highlighted with a yellow box), 'Load Campaign', and 'View Sales / Analysis Criteria'.

This opens a new save window.

By default, the system is configured for you to save the selected criteria as a new campaign.



The 'Save Marketing Campaign' dialog box contains:

- Save As New Campaign
- Name: []
- Section: 'Or Save As:'
- Table:

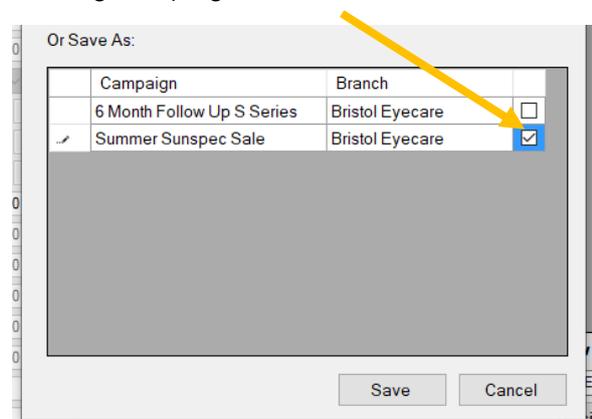
Campaign	Branch	
6 Month Follow Up S Series	Bristol Eyecare	<input type="checkbox"/>
Summer Sunspec Sale	Bristol Eyecare	<input type="checkbox"/>

Buttons: 'Save', 'Cancel'

Type the name of your campaign in the 'Save as' field.

Then click on the 'Save' button

If you would like to update the criteria against an already saved claim tick the box next to the existing campaign and then click 'save'.



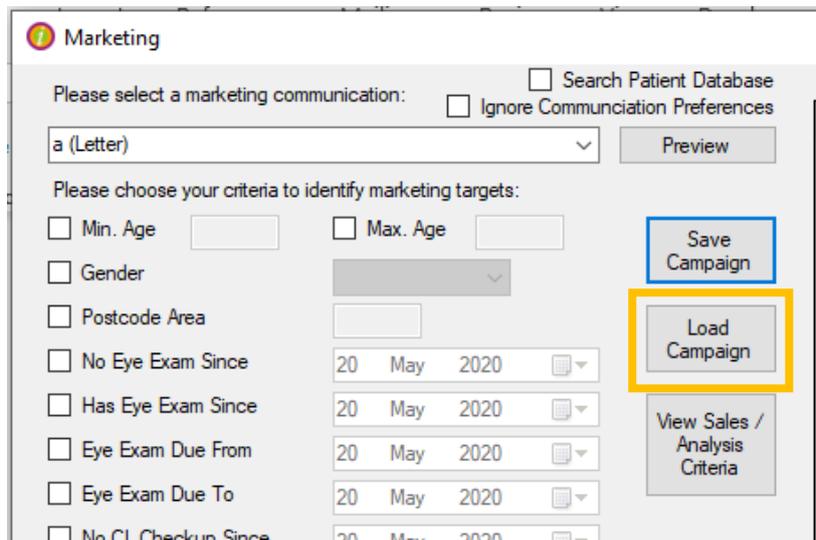
The 'Or Save As:' section of the dialog box shows the same table as above, but with the 'Summer Sunspec Sale' row selected and its checkbox checked:

Campaign	Branch	
6 Month Follow Up S Series	Bristol Eyecare	<input type="checkbox"/>
Summer Sunspec Sale	Bristol Eyecare	<input checked="" type="checkbox"/>

Buttons: 'Save', 'Cancel'

Loading a saved Campaign

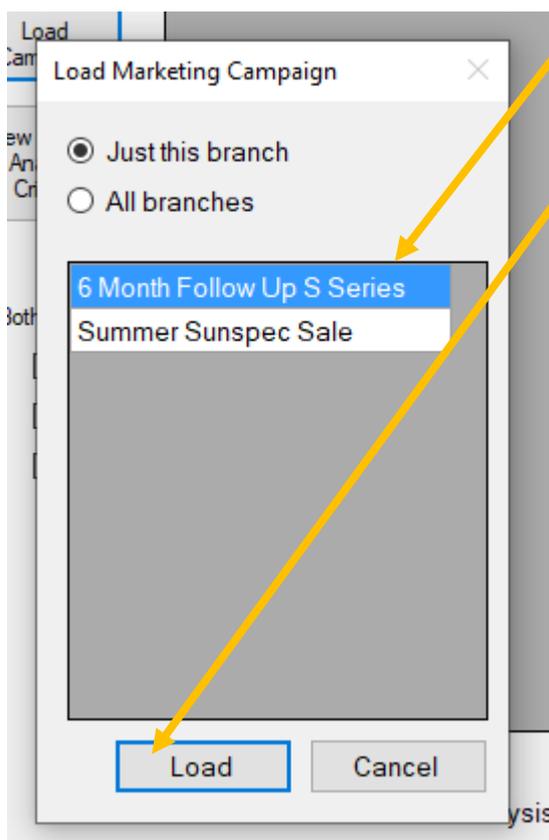
To load a saved campaign, click on the 'Load Campaign' button.



The image shows a 'Marketing' form with the following elements:

- Buttons: Search Patient Database, Ignore Communication Preferences
- Dropdown: Please select a marketing communication: a (Letter)
- Buttons: Preview, Save Campaign, Load Campaign (highlighted with a yellow box), View Sales / Analysis Criteria
- Section: Please choose your criteria to identify marketing targets:
- Criteria (all with checkboxes):
 - Min. Age: [input]
 - Max. Age: [input]
 - Gender: [dropdown]
 - Postcode Area: [input]
 - No Eye Exam Since: 20 May 2020
 - Has Eye Exam Since: 20 May 2020
 - Eye Exam Due From: 20 May 2020
 - Eye Exam Due To: 20 May 2020
 - No CI Checkin Since: 20 May 2020

A load marketing campaign window will open.



The 'Load Marketing Campaign' dialog box contains:

- Radio buttons: Just this branch, All branches
- List of campaigns:
 - 6 Month Follow Up S Series (highlighted with a blue bar)
 - Summer Sunspec Sale
- Buttons: Load (highlighted with a blue box), Cancel

Click to highlight the campaign you would like to load.

Then click 'Load'

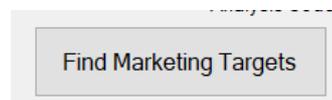
This will automatically close the window and select the relevant criteria on the main marketing form.

You can now continue with the process of creating a marketing target list by selecting a communication.



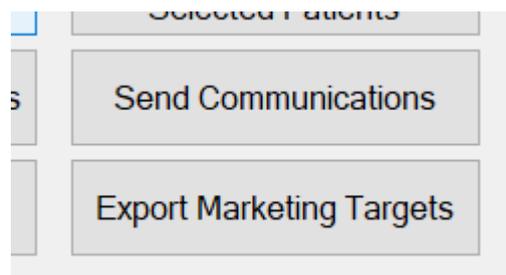
The image shows the 'Marketing' form with the dropdown menu open, displaying 'Updated Opening Hours (Email)' as the selected communication.

Clicking 'Find Marketing Targets'



A button labeled 'Find Marketing Targets'.

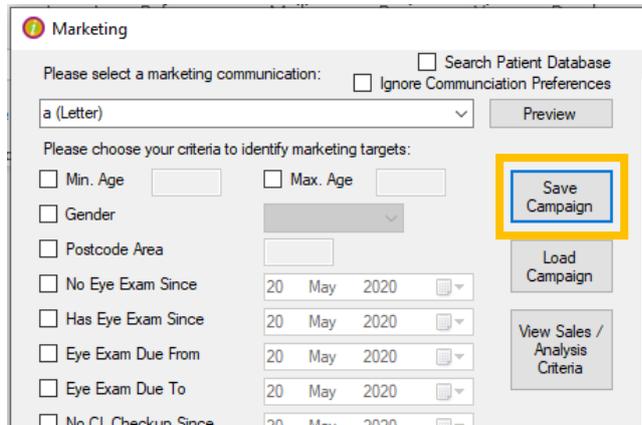
Then Sending or Exporting communications.



Two buttons are shown: 'Send Communications' and 'Export Marketing Targets'.

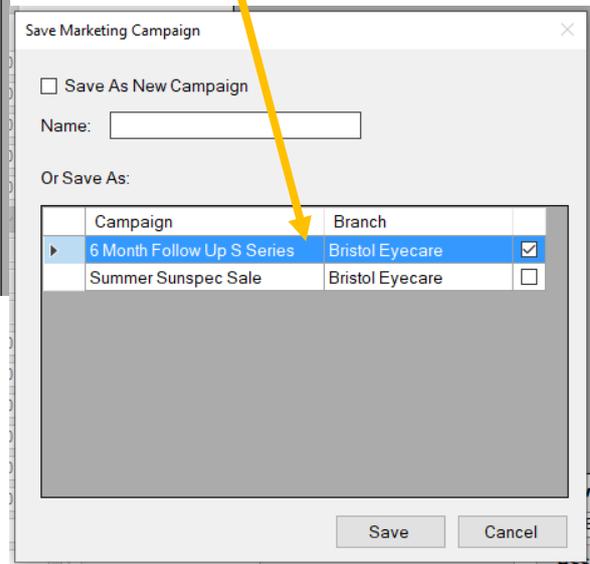
Deleting a saved campaign

To delete a now obsolete saved campaign, click on the save campaign button.



The screenshot shows the 'Marketing' module interface. It includes a dropdown menu for 'Please select a marketing communication:' with 'a (Letter)' selected. Below this are several checkboxes for criteria to identify marketing targets, such as 'Min. Age', 'Max. Age', 'Gender', 'Postcode Area', and various 'Eye Exam' dates. A yellow box highlights the 'Save Campaign' button on the right side of the interface.

In the new window that opens, click to highlight the campaign you would like to delete.



The screenshot shows the 'Save Marketing Campaign' dialog box. It has a 'Name:' field and a 'Save As New Campaign' checkbox. Below is a table with columns 'Campaign', 'Branch', and a checkbox. The first row is highlighted in blue. A yellow arrow points from the text above to the first row of the table.

Campaign	Branch	
6 Month Follow Up S Series	Bristol Eyecare	<input checked="" type="checkbox"/>
Summer Sunspec Sale	Bristol Eyecare	<input type="checkbox"/>

Then click the delete button on your keyboard.

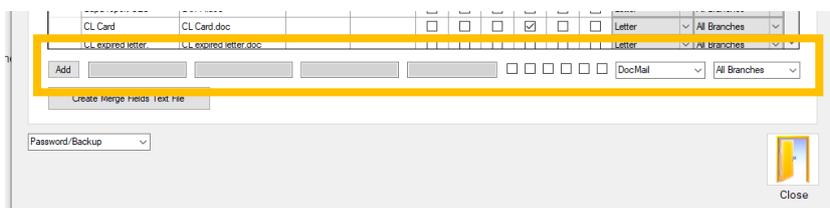
Creating a marketing communication

Marketing communications are set up in the 'Ad Hoc Comms' tab of the maintenance module.

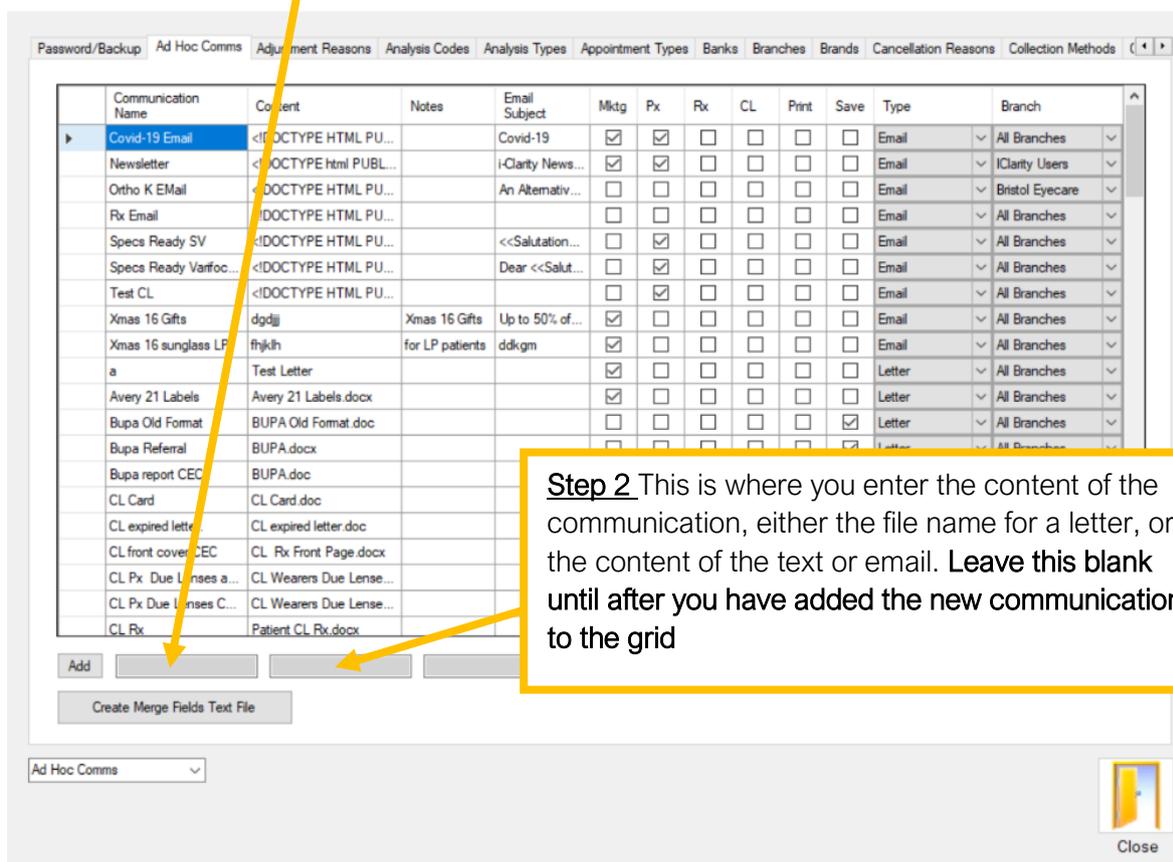


Adding a new communication

A new communication is added to the 'Ad Hoc Comms' tab by completing the bottom line.



Step 1 Type the communication name e.g. Summer Marketing



Step 3 Select the tick box for marketing.

Step 4 Select the communication type from the dropdown list. e.g. Email or SMS or Letter

Step 5 If the communication is specific to one branch you can select that branch from the dropdown list

Step 6 Click add

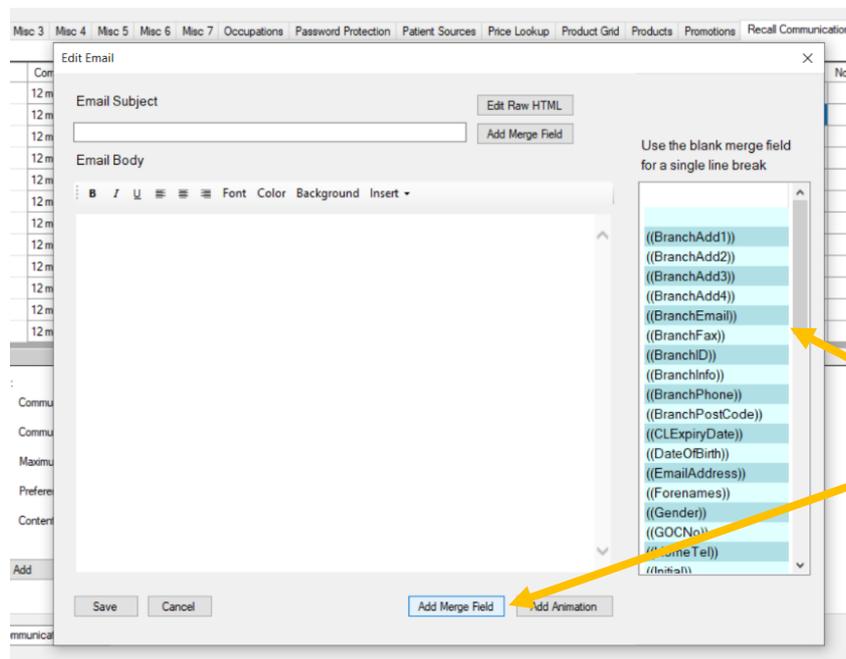
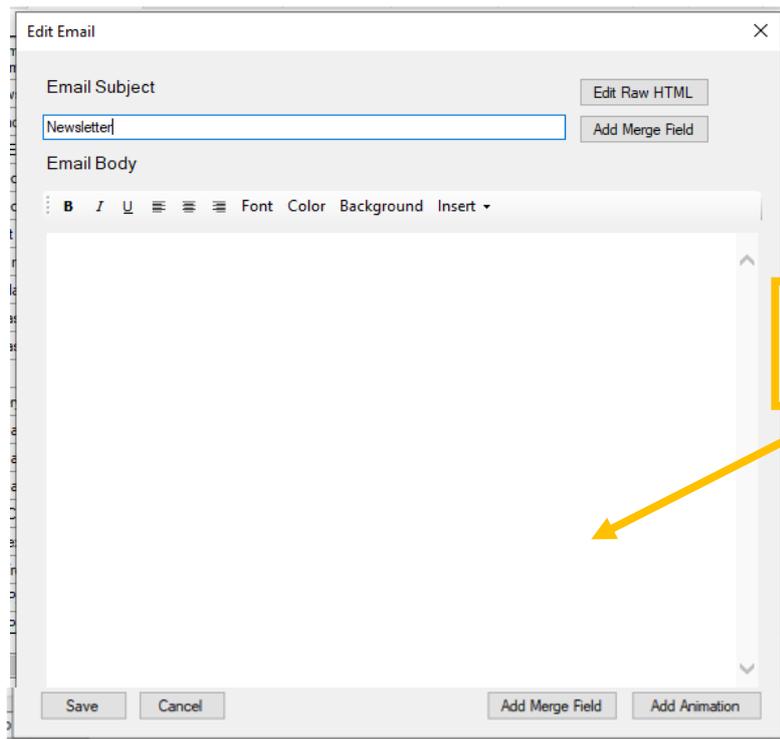
After clicking add, the communication will be added to the grid above.

To add the content to your communication, double click on the content box.

Communication Name	Content	Notes
Newsletter		

Because you have already added the communication with a communication type, double clicking on the content box will open the applicable window for the content you are adding.

Adding Email Content

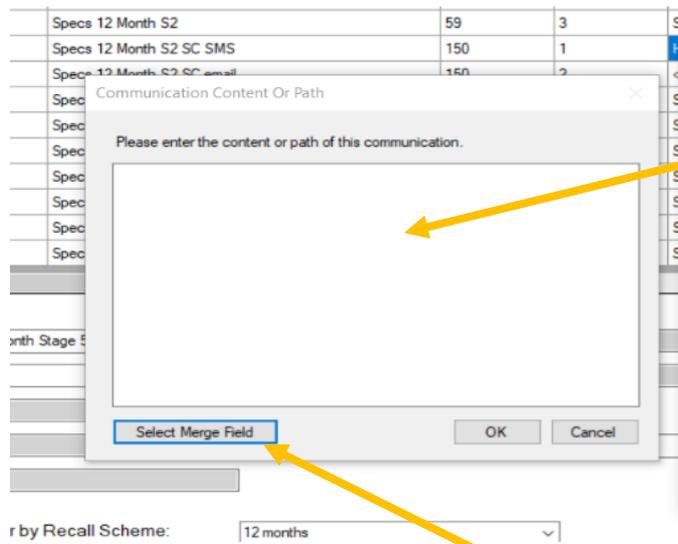


Once complete, click the save button.

The email subject can be typed into this field on the grid.

Communication Name	Content	Notes	Email Subject	Mktg
Newsletter				<input checked="" type="checkbox"/>

Adding SMS Content



Type your text message content in this main section.

You can insert merge fields into the main body of the text by clicking the "Select Merge Field" button.

A list of available merge fields will appear.

Double click on the merge field to enter it into the text message content.

Once complete click the 'OK' Button.

Adding a Letter

If your communication type is a letter, type the file name of the document, including the file extension, directly into the contents box.

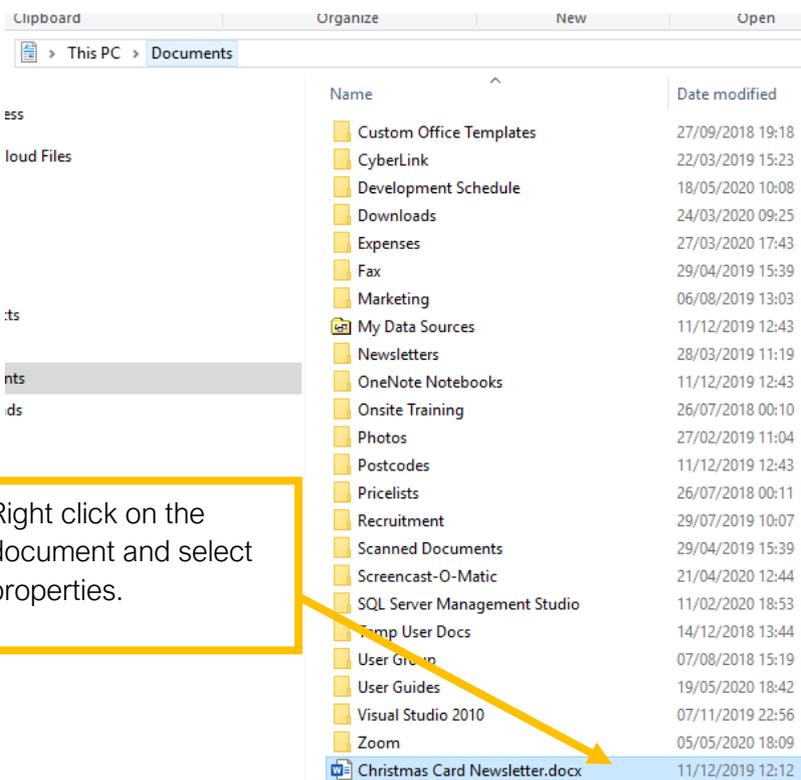


Communication Name	Content	Notes
Newsletter		

(If you have not already set up and saved your document please see “word document set up” below)

You can find the file name by following these steps:

Firstly, Open the file location but do not open the document.

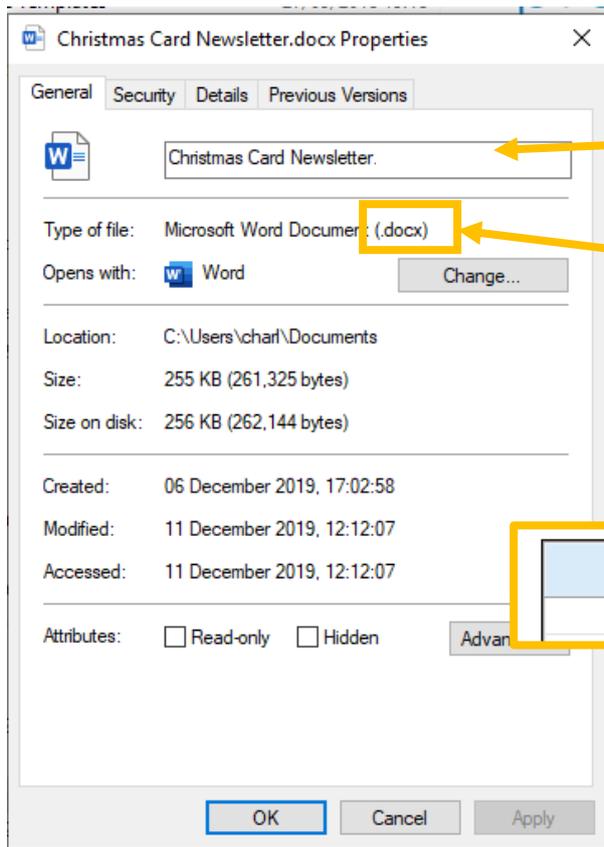


Clipboard Organize New Open

> This PC > Documents

Name	Date modified
Custom Office Templates	27/09/2018 19:18
CyberLink	22/03/2019 15:23
Development Schedule	18/05/2020 10:08
Downloads	24/03/2020 09:25
Expenses	27/03/2020 17:43
Fax	29/04/2019 15:39
Marketing	06/08/2019 13:03
My Data Sources	11/12/2019 12:43
Newsletters	28/03/2019 11:19
OneNote Notebooks	11/12/2019 12:43
Onsite Training	26/07/2018 00:10
Photos	27/02/2019 11:04
Postcodes	11/12/2019 12:43
Pricelists	26/07/2018 00:11
Recruitment	29/07/2019 10:07
Scanned Documents	29/04/2019 15:39
Screencast-O-Matic	21/04/2020 12:44
SQL Server Management Studio	11/02/2020 18:53
Temp User Docs	14/12/2018 13:44
User Group	07/08/2018 15:19
User Guides	19/05/2020 18:42
Visual Studio 2010	07/11/2019 22:56
Zoom	05/05/2020 18:09
Christmas Card Newsletter.docx	11/12/2019 12:12

Right click on the document and select properties.



File Name

File Extension

Type the file name followed by the file extension into the content field of the Ad Hoc Comms tab in maintenance.

Communication Name	Content	Notes	Er Su
letter test	Christmas Card Newsletter.docx		

Word document set up

Save your word document in your ad hoc folder. You can find out where this is by going to your branches tab in maintenance:

CL Form Path	
Adhoc Communications Path	C:\Temp\Ad Hoc Docs\
Recall Communications Path	C:\Temp\Recall Letters\

When you have your content for each of your patient letters saved you need to input “placeholders” in order that the patient’s details will be mail merged into the document. You need to export a sample mail merge file from i-Clarity to use in your document.

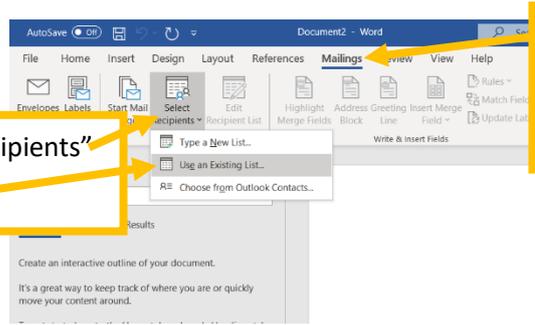
Step 1 Log in to i-Clarity and go to the “further details” tab in patient records

Step 2 Click on the “Create Sample Merge Files” button

The screenshot shows the 'Patients Records for Bristol Eyecare' interface. The 'Further Details' tab is selected. A yellow box highlights the 'Further Details' tab and the 'Create Sample Merge Files' button. The interface includes sections for 'Selected Analysis Codes' (Diabetic), 'Available Analysis Codes' (listing various codes like 100% Optical 2018, AIO, Beta Site, etc.), and a 'Patient Details' form with fields for Patient Source, Occupation, NHS Number, College, and Ethnicity. At the bottom, there are navigation buttons like 'Save', 'New', 'Refresh', and 'Log Out'.

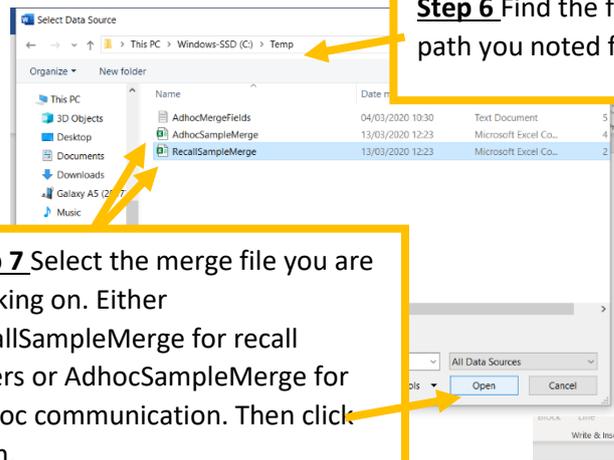
Step 3 Take a note of the file path that the file has saved to

The screenshot shows a 'Complete' dialog box with the message 'Sample merge files created at C:\Temp\'. A yellow box highlights the file path 'C:\Temp\' and an arrow points to it from the text 'Step 3 Take a note of the file path that the file has saved to'. The dialog box also shows 'Global System ID: 1' and an 'OK' button.



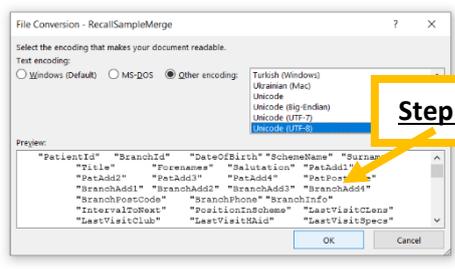
Step 4 Go to your word document that contains your letter, click on "mailings"

Step 5 Click "select recipients" then "use existing list"

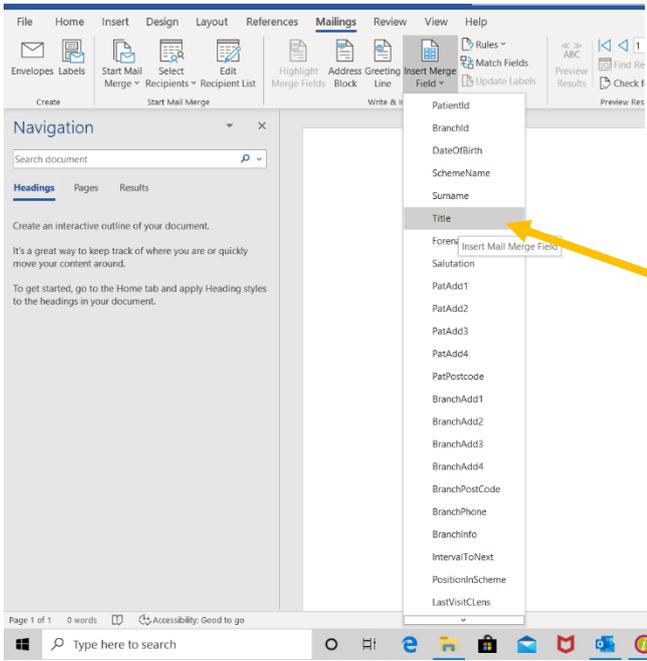


Step 6 Find the file using the file path you noted from step 3

Step 7 Select the merge file you are working on. Either RecallSampleMerge for recall letters or AdhocSampleMerge for ad hoc communication. Then click open.



Step 8 Click OK



Step 9 In "mailings" go to "insert merge fields" and select the field you want from the list. For a full list of what information each merge field inserts see appendix 3

You can now save changes to your document.