



## **GiftWorks Mailing Center Guide**

### **THE BIG PICTURE**

The Mailing Center in GiftWorks is a comprehensive donor communications center that provides a centralized place to organize and implement all communications with your donors—the cornerstone to any successful development program. Using the Mailing Center, you can:

- Create letters for solicitations, thank you letters, and other communications, and save and organize them in the Letter Library.
- Merge donor and donation information directly into your letters, emails, labels, and envelopes. Simply insert the fields you want to include and GiftWorks handles the rest.
- Use custom mailing lists or SmartLists to generate any communication, including email, to any group of donors.
- Record your mailings, including solicitations and acknowledgements, in each recipient's mailing history for a complete picture of who received what and how you've communicated with your donors.
- **PREMIUM**  
Save postage expenses for mailings with more than 200 pieces. GiftWorks Premium automatically sorts Standard Discounted mailings by ZIP Code and helps you prepare your mailing to qualify for lower discounted mailing rates.

Communicating regularly with your donors, and keeping track of how and when you communicated with them, will let you establish and maintain the types of relationships you can rely on to help build and grow your fundraising efforts over time.

### **A CLOSER LOOK**

#### **THE BENEFITS OF THE LETTER LIBRARY**

The letter library provides a place for you to organize and store all of your letter templates. GiftWorks provides a number of different templates to get you started, and you can create new ones or make modifications to the existing ones as necessary. As you build your library over time, you can review your past mailings to see which were most successful, and use any of them as a template for a new mailing.

#### **THE POWER OF MAILING LISTS AND SMARTLISTS**

Mailing lists contain predefined groups of donors you want to receive specific types of mailings. Examples include a newsletter list or annual report recipients. Mailing lists are maintained between mailings by manually adding or removing donors from the list, either individually or in groups. Selecting recipients (lists or single donors) is the first step of the mailing process. (See the **Scenarios** of this guide for more details.)

SmartLists are built using donor or donation criteria and are available for a variety of purposes, including sending mailings. The list results will automatically change over time based on which donors or donations currently meet the criteria you specified for the list. An example of a SmartList mailing is a targeted solicitation where you want to send a specific letter to donors who are alumni and whose gift total for the current year is greater than \$500. (See the **Scenarios** of this guide for more details.)

### **RECORDING YOUR MAILINGS**

By recording your mailings, you create a communication history that is always available on the **Notes, Tasks & Files** tab when viewing a donor. You can also view a complete history of all mailings in the Mailing Center, and can use mailing history as criteria when building SmartLists.

This history can assist you in planning future mailings by targeting those donors who received a past mailing. You can track who was invited to an event and then use the invitation history to track the attendees—and it's all stored in one location. (See the **Scenarios** of this guide for more details.)

### **PREMIUM**

#### **REDUCE POSTAL EXPENSES**

Postage expenses add up quickly especially when mailings total 200 or more pieces. If you have ever tried to sort a large mailing by ZIP Code to qualify for lower postage rates, you know the cost of your time adds up quickly as well. GiftWorks Premium can help you save time and money when preparing USPS Standard Discounted mailings by automatically sorting your mailings by ZIP Code, printing mail tray labels, and providing you with the information you will need to complete the necessary documentation for the mailing.

The steps for mailing to a list or SmartList, using the Letter Library, generating a mailing and recording the mailing all remain the same. Review the Standard Discounted mailing checklist and follow the Preparing Your Mailing steps to qualify for lower postage rates.

## SCENARIOS

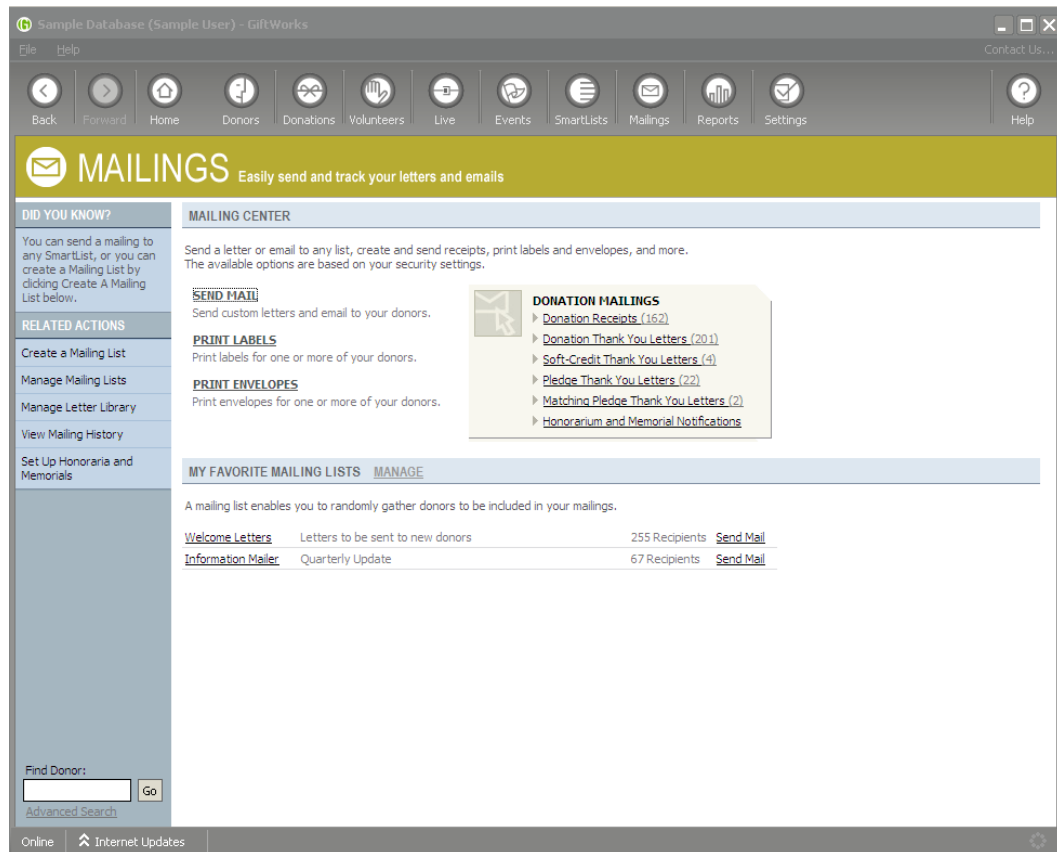
### SCENARIO 1: USING THE LETTER LIBRARY

Create thank you letters with the proper donor information and the donation details necessary for the letter to serve as a receipt as well as an acknowledgement.

- a) The donation, receipt and pledge letter types provide access to fields for specific donation information such as amount, date, payment type, campaign or fund, and donation custom fields.
- b) Donor contact information, including the primary address, and formal and informal versions of addressee names and salutations, is always available, regardless of letter type.

### The Steps:

To enter the Mailing Center, click the **Mailings** button at the top of GiftWorks.



In the main window of the Mailing Center, click **Manage Letter Library** in the left blue menu.

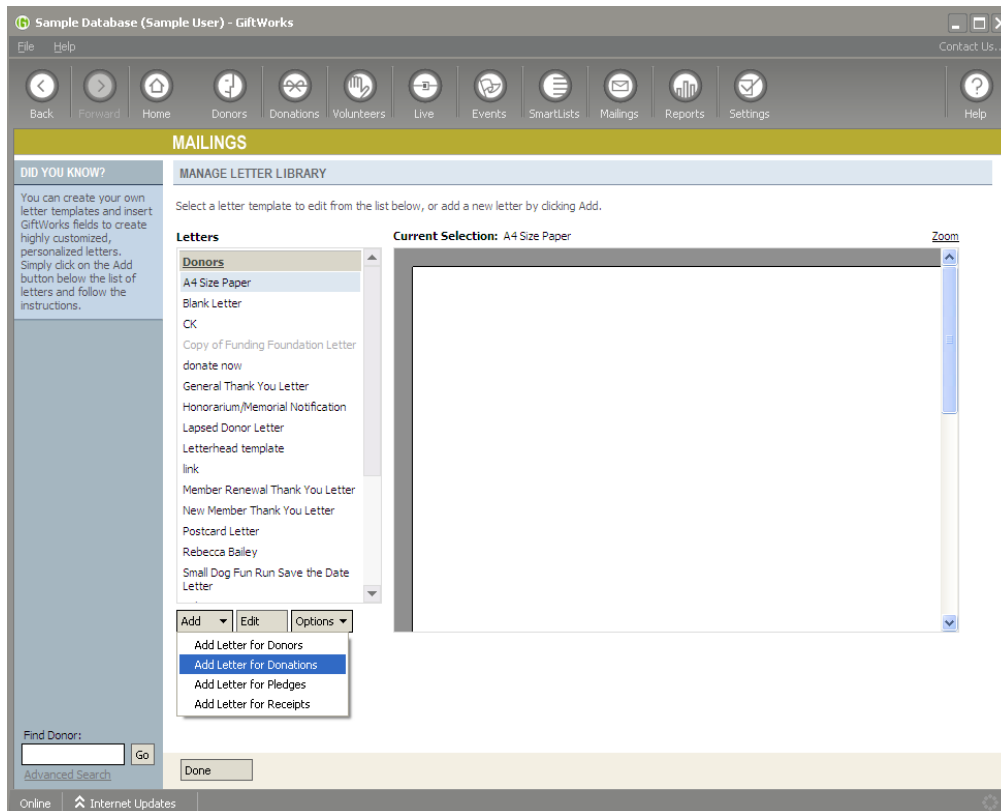
In the library you have access to all letter types—donor, donation, pledge, and receipt—each listed under the appropriate heading. The different types of letters serve different purposes:

- Donor letters can be sent to any SmartList of donors, to any mailing list, or to individual donors. You can also send a donor letter to a SmartList of donations or pledges by clicking **Send mail to these donors** in the left blue menu when viewing the SmartList. Donor letters can also be used for the Honorarium and Memorial Notifications Mailing.

- Donation letters can be sent to any SmartList of donations and can be used for the Donation Thank You Letters Mailing.
- Pledge Letters can be sent to any SmartList of pledges and can be used for the Pledge Thank You Letters and Matching Pledge Thank You Letters Mailings.
- Receipts can be used for the Donation Receipts Mailing.

View existing letters by clicking on each gray heading. As you add your own letters, they will be sorted in the same manner.

Add a new donation letter by clicking the **Add** button and selecting **Add Letter for Donations**.



➤ Enter a name for your letter.

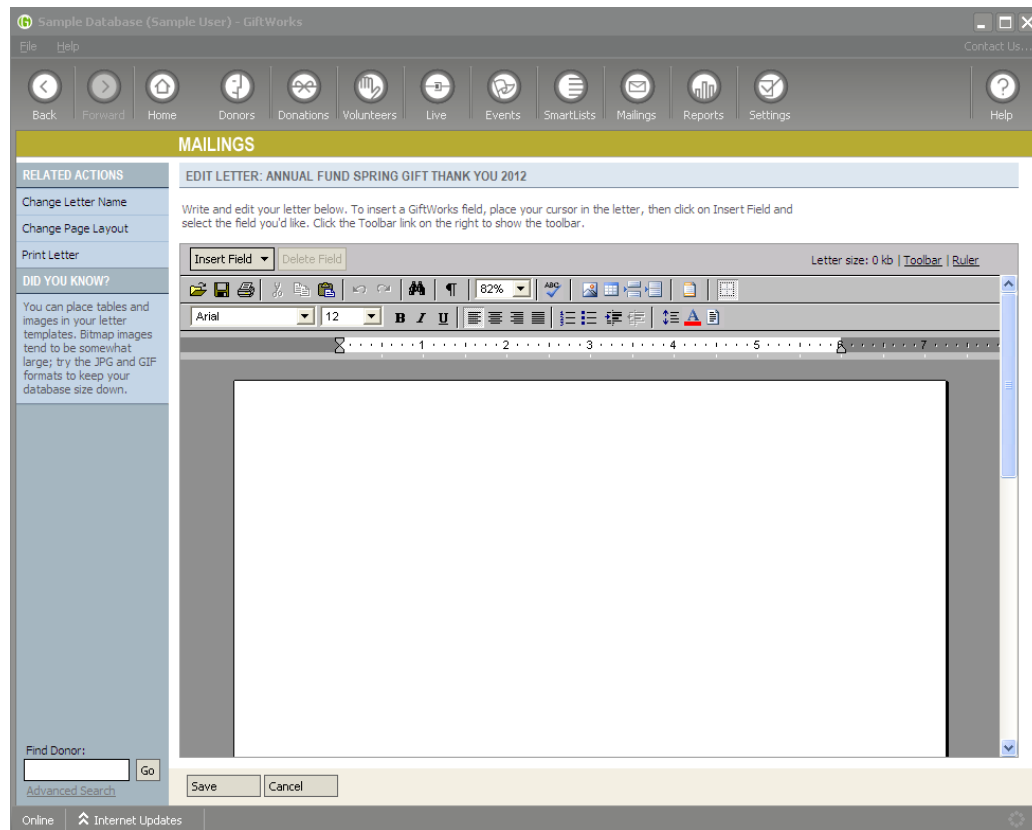
### **IMPORTANT NOTE**

Create naming standards for your letters that provide good identification, organized filing, and a plan for naming future letters of the same type. Each recorded letter becomes part of your system, so each letter type should have a name that is slightly different, and every version should have a name slightly different than the previous one. Consider incorporating abbreviations and dates. For example:

- Annual Fund Fall Gift Thank You 2012
- Annual Fund Spring Gift Thank You 2012
- Capital Building Gift Thank You
- Capital Building Pledge Thank You

## Capital Building Pledge Payment Thank You

- After entering a name for your new letter, you will be in the Edit Letter window.



- From the **Related Actions** menu on the left side of the screen, select **Change Page Layout** to define your paper size, layout, margins, headers, and footers.
- Create the text of your letter.
  - If your text is already in a word-processing document, you can save that as a rich text format file (.rtf) and then click on the "Open" icon on the toolbar, choose that .rtf file and insert it into your letter. If not, you can start typing just as you would in a word-processing application.
  - Add fields for specific donor and/or donation information using the **Insert Field** button at the top of the letter editor window. Fields will be highlighted in gray as they are in this sample:

Donor - General : Today's Date - Long Format

Donor - Contact Information: Addressee - Formal  
Donor - Contact Information : Address Block

Dear Donor- Contact Information : Salutation - Formal :

Thank you for your most recent contribution in the amount of  
Donation : Donation Amount to My Organization : Name. Your  
donation was postmarked on Donation : Donation Date –Long  
Format. Your gift will make it possible for us to work toward our  
mission in many ways.



toolbar, choose that .rtf file and insert it into your letter. If not, you can start typing just as you would in a word-processing application.

- Add merge fields for specific donor and/or donation information. Merge fields are highlighted in gray in this sample:

Donor - General : Today's Date - Long Format

Donor - Contact Information: Addressee - Formal

Donor - Contact Information : Address Block

Dear Donor- Contact Information : Salutation - Formal :

Thank you for your continuing support of My Organization : Name. Support like yours allows us to continue to My Organization : Mission Statement. Just as a reminder, your current membership expires on Donor - General: Renewal Date – Long Format.

Add as many fields as desired, remembering to use the proper spacing and punctuation.

- Use the tool bar to format your text and insert pictures, tables, and page breaks—similar to the way you would in Microsoft Word.

➤ Click **Save**.

### **SCENARIO 3: GENERATING DONOR-BASED MAILINGS**

1. Send a grand opening invitation to all donors who contributed to the Capital Campaign

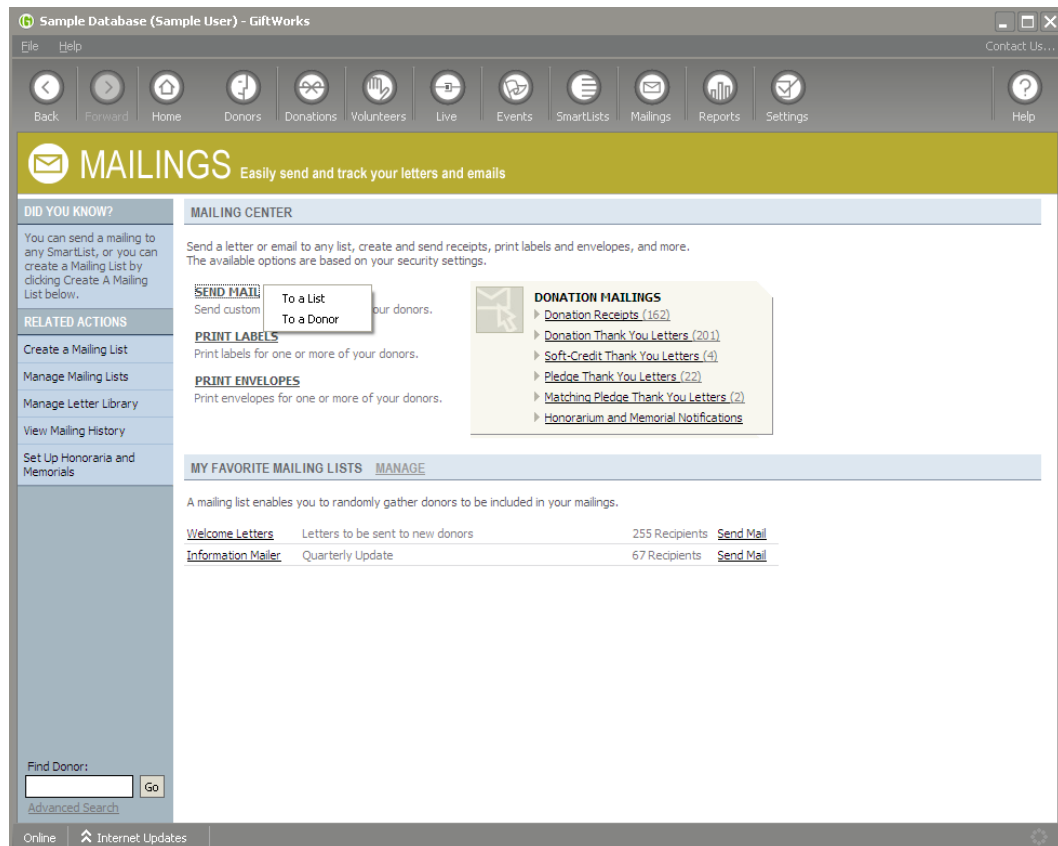
This mailing is donor-based because it is going to a list of donors who gave to a specific campaign, but it does not rely on other details of their specific gifts.

- a) Build a SmartList based on **Donors whose: donation campaign is 'Capital Campaign.'** (See the SmartLists section of the GiftWorks manual for more information on creating SmartLists.)
  - b) From the Mailing Center, send mail to this SmartList and either:
    - Generate personalized letters with envelopes or labels.
    - Generate envelopes or labels only—if you have invitations printed through another source and just want to imprint the associated envelopes.
    - Export the list to provide to your mailing house or a professional printer.
  - c) Record the mailing to all recipients' records so you can track who was invited and create other SmartLists in the future based on invitations sent for the grand opening.
    - Use naming conventions such as "Invitation mailing names begin with Invitation"; the name of the event comes next, and the specific date or year of the invitation is last.  
Your mailing name might be: 'Invitation Capital Grand Opening 2012.'
    - Make sure you track the date you mailed the invitation.
2. Send a golf tournament promotion to donors who have played in your previous tournaments.
    - a) Typically, you will use donor groups to record participation in events. In this case, you might have groups called: Golf Player 2011, Golf Player 2012, etc. Create a SmartList with criteria like: **Donors whose: group is 'Golf Player 2011' or**

- 'Golf Player 2012.'** Be sure to list all players or only those who played in particular years.
- b) From the Mailing Center, send mail to this SmartList and either:
    - Generate personalized letters with envelopes or labels.
    - Generate labels or envelopes for flyers printed through another source.
    - Export the list to provide to your mailing house or a professional printer.
  - c) Record the mailing, again using naming conventions that help to organize the mailing history window, and assist you in selecting specific mailings when building SmartLists.

### The Steps:

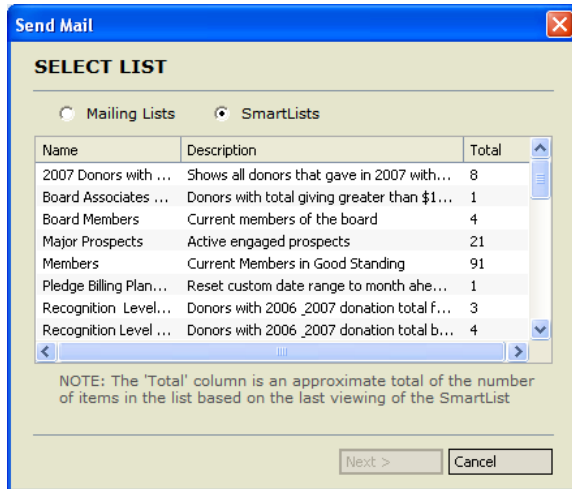
To enter the Mailing Center, click the **Mailings** button at the top of GiftWorks. Next, click **Send Mail** and choose either **To a List** or **To a Donor**.



### Sending Mail to a List

In the main window of the Mailing Center, click **Send Mail** and select **To a List**, then select either **Mailing Lists** or **SmartLists**. Highlight the specific list you want to send the mailing to and click **Next**.





### **Sending Mail To a Donor**

In the main window of the Mailing Center, click **Send Mail** and select **To a Donor**. You will be provided with the search window to select your desired donor.

You can also send mail to the donors in any SmartList from the left menu when viewing the list. Whichever way you choose to begin your donor mailing, the remaining steps will be the same.

**See the Mailing Center section of the GiftWorks manual for more information on the mailing process.**

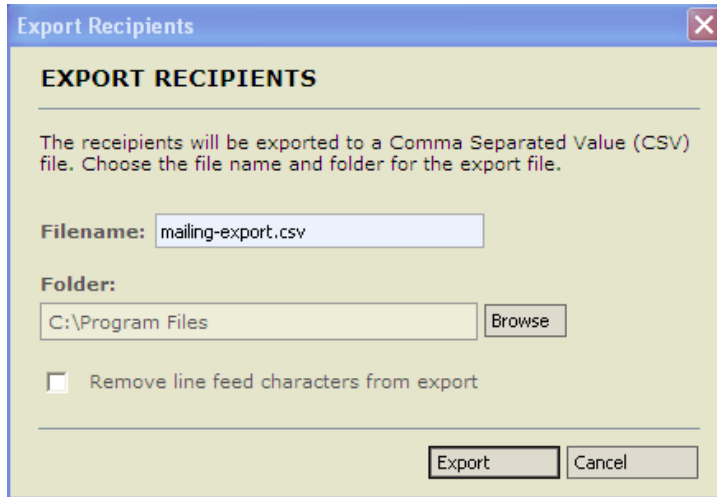
### **SCENARIO 4: EXPORTING MAILING RECIPIENTS**

If you are using a mailing house or professional printer to create your mailing, you will likely just need to send them a file containing the recipients' names and address information. To export the list of mailing recipients and their information, begin your mailing as if you were sending a letter to a SmartList or mailing list.

On the Choose Options screen, select **Send Letters Only**. Choose the recipients and select any letter (the letter you choose does not have an impact on the exported list). Continue through the Generate Mailing step (click **Generate Mailing** on that screen), and on the Finish Mailing screen click **Export Recipient List** in the **Other Tasks** menu on the left.

You can then choose a location and filename to which to export the list of recipients. The file will be saved as a comma separated value (.CSV) file. Most mailing houses can work directly with this format. You can also open the .CSV file into Microsoft Excel and save it as an .XLS file, if needed.

Once you have exported the recipient list, you can record the mailing to the donors' mailing histories the same way you would if you actually generated and printed or saved the mailing from GiftWorks.



### **SCENARIO 5: GENERATING DONATION-BASED MAILINGS**

1. Send a targeted solicitation mailing to donors who gave or pledged to a specific campaign.
  - a) Create a SmartList of all donors who gave to the desired campaign using the Donation History/Any Donation Campaign criteria (see the SmartLists section of the GiftWorks Manual for more information on creating SmartLists).

**Create a SmartList**

**ADD LIST CRITERIA**

Select category: [Click here to select a criteria](#)

- Personal Info ▶
- Address Info ▶
- Phone/Email Info ▶
- Relationships ▶
- Contact Preferences ▶
- Development Info ▶
- Tasks ▶
- Notes ▶
- Files ▶
- History ▶
- Mailing History ▶
- Donation History ▶**
- Soft-Credit History ▶
- Household Giving History ▶
- Pledge History ▶
- Donor Custom Fields ▶
- Donation Custom Fields ▶
- Volunteer Information ▶
- Events Activity ▶
- Events Financials ▶

**Summary:**  
*Show donors with*

- Current Fiscal Year Total Donations
- Current Fiscal Year Average Giving
- Current Fiscal Year Largest Donation
- Current Fiscal Year Number of Donations
- Previous Year Total Donations
- Previous Year Average Giving
- Previous Year Largest Donation
- Previous Year Number of Donations
- Previous Fiscal Year Total Donations
- Previous Fiscal Year Average Giving
- Previous Fiscal Year Largest Donation
- Previous Fiscal Year Number of Donations
- Period 1 Total Donations
- Period 1 Average Giving
- Period 1 Largest Donation
- Period 1 Number of Donations
- Period 2 Total Donations
- Period 2 Average Giving
- Period 2 Largest Donation
- Period 2 Number of Donations
- Period 3 Total Donations
- Period 3 Average Giving
- Period 3 Largest Donation
- Period 3 Number of Donations
- Period 4 Total Donations
- Period 4 Average Giving
- Period 4 Largest Donation
- Period 4 Number of Donations
- Any Donation Date
- Earliest Donation Date
- Most Recent Donation Date
- Any Payment Type
- Has Unacknowledged Donations
- Has Unreceipted Donations
- Any Donation Fund
- Any Donation Campaign**
- Any Donation Appeal

- b) Create a donor letter in the letter library to use for the solicitation. Make sure you name the letter something that will allow you to recognize what you used it for, like Annual Campaign Donor Resolicitation Letter 2012.
  - c) Use the SmartList and letter you created to generate the mailing to the donors, being sure to record the mailing at the end of the process so you can track the response rate and donations you get as a result of this solicitation.
2. Donor Recognition Wall Name Verification
- a) You may want to send a letter to all Capital Campaign donors verifying the level of their contribution to the campaign and the inscription you are planning to place on the recognition wall, and offering them a chance to make changes. The recommended approach for storing the "recognition name" is to use a donation custom field and to enter it for each donation that comes in. Alternatively, you can use one of the salutation or addressee fields for this purpose.
  - b) Build a SmartList of **Donations whose: campaign is 'Capital Campaign'**. See the SmartLists section of the GiftWorks manual for more information on creating SmartLists.

- c) In the Mailing Center, click **Send Mail** and choose **To a List**, then click SmartLists and choose the SmartList you created above and click **Next**.
- d) Choose **Send Mail for These Donations** and click **Next**. If there are any unreceived pledge payments in the SmartList, you will receive a notification that they will be ignored. Click **Yes** to continue.
- e) Choose whether you want to send email, letters, labels, or envelopes. For the **Recipients** option on the **Select Options** screen, click **Send one mailing per donor**.

Sample Database (Sample User) - GiftWorks

File Help Contact Us...

Back Forward Home Donors Donations Volunteers Live Events SmartLists Mailings Reports Settings Help

### MAILINGS

CHOOSE OPTIONS SMARTLIST - UNSAVED

Choose the options for this mailing.

Select Options Choose Recipients Select Letter Generate Mailing Finish Mailing

**Mailing Format:**

- Send Email using Outgoing (SMTP) Server [configure](#)
- Send Letters Only
- Send Letters & Labels
- Send Letters & Envelopes

**Mailing Discount:**

- No discount / First Class Mail
- USPS Standard Mail Machinable Letters
- USPS Standard Mail Automation Letters

**Sort:**

Primary:  Secondary:

**Label Type:** Avery Standard - 5160 Address [Change Label](#) [Format Labels](#)

**Recipients:**

- 
- 
- 

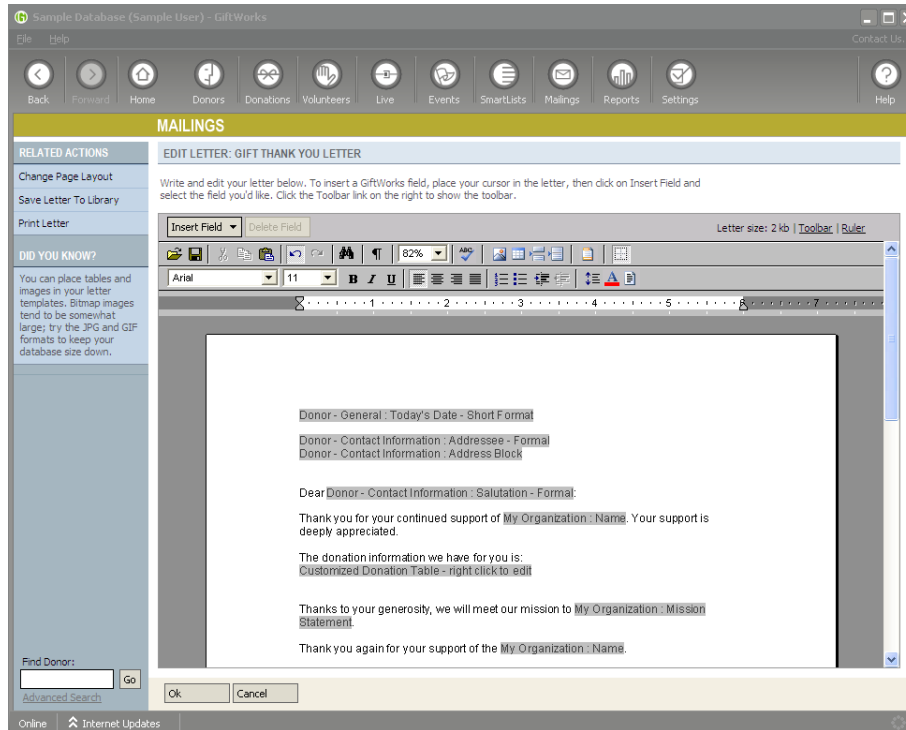
Find Donor:   [Advanced Search](#)

< Back Next > Cancel

Online [Internet Updates](#)

- f) Choose your other options, then continue through the mailing process.

- g) When creating the letter for this mailing, it should be a donation letter, and you will want it to look something like the following:



The **Customized Donation Table** field will insert a table with one line for each of the donor's donations in the SmartList. The **Donation Custom: Recognition Name** is the donation custom field that includes the donor's desired name for recognition.

- h) Be sure to record the mailing to each donor's record so you have a record of who received the mailing.

## SCENARIO 6: PREPARING USPS DISCOUNTED MAILINGS

USPS discounted mailings are mailings with more than 200 pieces that also meet size, shape and weight standards, and can qualify for lower postage rates.

Before you generate your first USPS discounted mailing with GiftWorks Premium you will also need to complete several other steps required by the USPS in order for your mailings to qualify for the lowest rates available.

Postal rates and other standard mail requirements periodically change. For the most up-to-date USPS Standard Mail rates and other requirements such as ZIP Code verification, consult your local Post Office or visit [www.usps.com](http://www.usps.com).

### Mailing Checklist

[ ] Decide the Class of Mail

GiftWorks Premium will prepare mailings as:

- No discount/First Class Mail
- USPS Standard Mail Machinable Letters
- USPS Standard Mail Automation Letters.

[ ] Check the Accuracy of Your Address List

USPS Standard Mail Machinable and Automation Letters must display accurate addresses and ZIP Codes.

[ ] Decide How You Want to Pay Postage for Standard Discounted Mailings

[ ] Apply for a Mailing Permit

[ ] Apply for Nonprofit Mailing Privileges

[ ] Pay Annual Mailing Fee

**HELPFUL TIP**

Enter your Mailer Information in Change Your Organization Information in the Settings area. The Post Office City, State and ZIP/Postal Code refer to the Post Office from where you send your mailings. Check Sectional Center Facility if where you drop off your mailings is a SCF. Enter your mailing fee expiration date, and GiftWorks will remind you of the pending expiration in the Reminders area of your Home Page.

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**MAILER INFORMATION**

Post Office City:	<input type="text"/>
Post Office State:	<input type="text"/>
Post Office ZIP/Postal Code:	<input type="text"/>
Sectional Center Facility:	<input type="checkbox"/>
Mailing Fee Expiration Date:	<input type="text" value="None"/>
Mailer Identifier:	<input type="text"/>
Service Type Identifier:	<input type="text" value="0"/> If nothing specified, will default to 301

## Getting Started with the Mailing Center

The Steps:

Start the mailing by choosing to send mail.

The screenshot shows the 'MAILINGS' Mailing Center interface. The top navigation bar includes icons for Back, Forward, Home, Donors, Donations, Volunteers, Live, Events, SmartLists, Mailings (selected), Reports, and Settings. The main content area is titled 'MAILINGS' with the subtitle 'Easily send and track your letters and emails'. On the left, there is a sidebar with 'DID YOU KNOW?' (explaining how to send mailings), 'RELATED ACTIONS' (Create a Mailing List, Manage Mailing Lists, Manage Letter Library, View Mailing History), and a 'Find Donor' search box. The main area is divided into sections: 'MAILING CENTER' (with instructions and links for SEND MAIL, PRINT LABELS, and PRINT ENVELOPES), 'DONATION MAILINGS' (with links for Donation Receipts, Donation Thank You Letters, Soft-Credit Thank You Letters, Pledge Thank You Letters, Matching Pledge Thank You Letters, and Honorarium and Memorial Notifications), and 'MY FAVORITE MAILING LISTS' (with a 'MANAGE' link). Below this is a table of mailing lists:

Name	Description	Recipients	Action
<a href="#">Welcome Letters</a>	Letters to be sent to new donors	No Recipients	
<a href="#">Newsletter</a>	Our organization's newsletter	25 Recipients	<a href="#">Send Mail</a>
<a href="#">B&amp;B Thank You 2009</a>		52 Recipients	<a href="#">Send Mail</a>
<a href="#">2009 - Nutcracker Luncheon Mailing List</a>		437 Recipients	<a href="#">Send Mail</a>
<a href="#">Stewardship Packages - Sponsors - 2009-2010</a>		24 Recipients	<a href="#">Send Mail</a>

At the bottom, there is an 'Online' status indicator and an 'Internet Updates' button.

Choose a list from either a mailing list or a SmartList.

The screenshot shows the 'Send Mail' dialog box with the 'SELECT LIST' section. It has two radio buttons: 'Mailing Lists' (unselected) and 'SmartLists' (selected). Below is a table of lists:

Name	Description	Total
2007 Donors with ...	Shows all donors that gave in 2007 with...	8
Board Associates ...	Donors with total giving greater than \$1...	1
Board Members	Current members of the board	4
Major Prospects	Active engaged prospects	21
Members	Current Members in Good Standing	91
Pledge Billing Plan...	Reset custom date range to month ahe...	1
Recognition Level...	Donors with 2006 ,2007 donation total f...	3
Recognition Level ...	Donors with 2006 ,2007 donation total b...	4

Below the table is a note: 'NOTE: The 'Total' column is an approximate total of the number of items in the list based on the last viewing of the SmartList'. At the bottom, there are 'Next >' and 'Cancel' buttons.

## Select Options

After selecting your mailing format, choose which type of postage discount rate you want to send your mailing:

- No discount/First Class Mail
- USPS Standard Mail Machinable letters  
A letter is machinable if it can be sorted on Postal Service processing equipment, displays an accurate address, and meets specific standards, including size, shape, and weight. Machinable letters are eligible for presort (discounted) rates.
- USPS Standard Mail Automation Letters  
A mailing can qualify for automation letter rates if it is machinable and the letters display the correct barcode as well as meeting weight, shape and size standards.

**MAILINGS**

**CHOOSE OPTIONS** MAILING LIST - 2009 SPRING MAILING - SUBSCRIBER NON DONOR

Choose the options for this mailing.

**Select Options**    Choose Recipients    Select Letter    Generate Mailing    Finish Mailing

**Mailing Format:**

- Send Email (requires configuration)
- Send Letters Only
- Send Letters & Labels
- Send Letters & Envelopes

**Mailing Discount:**

- No discount / First Class Mail
- USPS Standard Mail Machinable Letters
- USPS Standard Mail Automation Letters

**Please complete the following before continuing...**

- I verify the mail piece is machinable
- I verify the recipient addresses are accurate

Enter the mail piece thickness:  inches

**Sort:**

Primary:     Secondary:

**Label Type:** Avery Standard - 5160 Address [Change Label](#) [Format Labels](#)

Find Donor:   [Advanced Search](#)

## HELPFUL TIP

Standard Mail Machinable and Automation letters must have valid addresses to qualify for the discounted postage rates. Machinable letters must have ZIP Code verified addresses and Automation letters must have CASS-certified addresses.

### ZIP Code Verified Addresses

In order for a mailing to qualify for presorted Standard Mail machinable rates, you must check the accuracy of ZIP Codes prior to mailing. When you fill out and sign your postage statement you are certifying your mailing qualifies for the rates claimed. Your Post Office can help you choose the best option for verifying your mailing list addresses.



## CASS-certified Addresses

You must certify the accuracy of your mailing addresses by processing your address list through CASS-certified software for a mailing to qualify for Standard Mail Automation letters rates. Refer to the USPS guidelines for the frequency of certification.

## HELPFUL TIP

Both Machinable and Automation discounts provide great savings. Rates for letters can vary within a mailing depending on where the mail is being sent and where you take the mailing for processing. Sometimes the difference in postage between a Machinable and Automation letter is only one or two cents.

If you have never prepared your mailings to qualify for Standard Mail discounted rates, you may want to consider sending your mailings as Standard Mail Machinable letters. You will get a great postage rate over First Class Mail rates but will not have as many USPS requirements for the mailing.

## Choose Recipients

Standard Mail Machinable and Automation letters must all have valid addresses according to the different address requirements for each. You can either uncheck all invalid addresses in the recipient list or correct the addresses for recipients with invalid addresses before continuing with the mailing.

The screenshot shows the 'MAILINGS' software interface. The main window is titled 'Sample Database (Sample User) - GiftWorks'. The navigation bar includes buttons for Back, Forward, Home, Donors, Donations, Volunteers, Live, Events, SmartLists, Mailings, Reports, Settings, and Help. The 'MAILINGS' section is active, showing a progress bar with steps: Select Options, Choose Recipients (current), Select Letter, Generate Mailing, and Finish Mailing. The 'Choose Recipients' step is highlighted with a green dot.

**DID YOU KNOW?**  
All of the recipients of this mailing are listed in the main work area. If you don't want a donor to receive the mailing, simply uncheck the donor in the Include column.

**CONFIRM RECIPIENTS MAILING LIST - INVITES**  
Uncheck the recipients you would like to exclude from this mailing.

**Recipients**

Assigned To	Name	Address	Mail Preference	Note	Stat
<input checked="" type="checkbox"/>	ABC Company	54 Reed Road, Lancaster, PA 1...	No Preference		
<input checked="" type="checkbox"/>	Ellen Mauer	Acme Super Dog Apparel	invalid989 Acme Way, Lancaste...	No Preference	Acti
<input type="checkbox"/>	John Paws	Ajax Corporation	534 Walnut Avenue, 2nd Floor,...	No Preference	Plec
<input checked="" type="checkbox"/>	John Paws	Armstrong, David	726 Sunshine Road, Lancaster, ...	No Preference	Acti
<input checked="" type="checkbox"/>	Steven Barkerson	Armstrong, Vera	726 Sunshine Road, Lancaster, ...	No Preference	Acti
<input checked="" type="checkbox"/>	John Paws	Arnold, Rich	32 Roberson Rail Avenue, Lanc...	No Preference	Acti
<input checked="" type="checkbox"/>	John Paws	Arvitole, Benjamin and ...	555 River Road, Lampeter Sprin...	No Preference	Pro:
<input checked="" type="checkbox"/>	Steven Barkerson	Barton, Grant	6635 Chellingham Drive, Lancas...	No Preference	Acti
<input checked="" type="checkbox"/>	Ellen Mauer	Behanna, Paul	687 Yancy Road, Lancaster, PA...	No Preference	Acti
<input checked="" type="checkbox"/>	Steven Barkerson	Bell, Brian	19 School Drive, Lancaster, PA...	No Preference	Acti
<input type="checkbox"/>	Bell, Sandra		No Preference	Invalid Address	
<input type="checkbox"/>	Bell, Whitman		No Preference	Invalid Address	
<input checked="" type="checkbox"/>	Ellen Mauer	Bellon, Vicky	82 Steigle Street, Manheim, PA...	No Preference	Inak
<input checked="" type="checkbox"/>	Steven Barkerson	Berenfield, Jeffery	2 Spruce Street, Lancaster, PA...	No Preference	Acti
<input checked="" type="checkbox"/>	Steven Barkerson	Beristain, Charlie	10 Elm Street, Lancaster, PA 17...	No Preference	Acti
<input checked="" type="checkbox"/>	Steven Barkerson	Blaine, Sarah	678 Main Street, Lititz, PA 17603	No Preference	Acti

Included Donors: 164

Some recipients on this mailing do not have a complete address.  
Some recipients on this mailing do not wish to be mailed.

Buttons: Add, Check, Uncheck, Invert

Find Donor:  Go

Advanced Search

Navigation: < Back, Next >, Cancel

Footer: Online, Internet Updates

**HELPFUL TIP**

Discounted mailings must have at least 200 pieces to qualify for the lowest rates. If your list does not have at least 200 recipients and you selected to send your mailing at one of the discounted rates when choosing your options, GiftWorks will not generate the mailing. Return to Select Options and choose No discount/First Class Mail.

**Select Letter**

If you have applied for and qualify to mail at Nonprofit Standard Rates, the material that you send must meet certain content standards. Refer to the [www.usps.com](http://www.usps.com) for standards.

**Generate Mailing**

You can preview your mail pieces before generating the mailing to check for any changes. If you are satisfied, click Generate Mailing and GiftWorks will merge the mailing information and perform the postal sortation. Once the mailing has been generated, you can preview the pieces before printing letters, envelopes and labels.

**HELPFUL TIP**

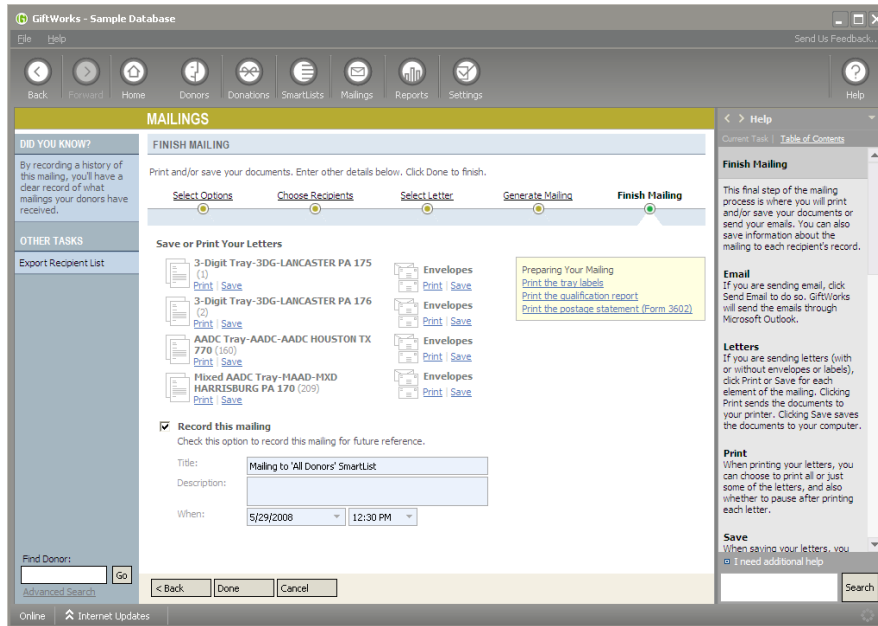
If you are sending a mailing with the USPS Standard Mail Automation discount, you will need to insert the Delivery Point Code field for display. Typically the barcode appears below the recipient address. For other permissible locations, consult the USPS at [www.usps.com](http://www.usps.com).

**HELPFUL TIP**

Before you proceed with printing your mail piece, the USPS strongly suggests that you take a mockup or sample of your mail piece to your mail piece design analyst and make sure the mail piece qualifies for the class of mail and postage rate you want. Some up-front investigation could save you thousands of dollars in unplanned postage costs.

**Finish Mailing**

Now that you have generated your mailing, you can see how GiftWorks Premium has done the work for you by sorting your mailing by the proper postal sortation trays for discounted rates. Each tray will hold the pieces that qualify for the same rate based on a number of USPS factors.



### HELPFUL TIP

The less sorting and address validation work the USPS has to do, the greater your savings. Keep your mailing organized by printing and assembling the mailing by each tray.

Each tray must display a correct corresponding label. In the Preparing Your Mailing area of Finish Mailing, you can print the tray labels for your mailing. Follow the USPS guidelines for preparing the mailing trays.

Complete the Necessary Supporting Documentation

You will need to print the mailing instructions in order to complete a qualification report and a Postage Statement (Form 3602) to accompany your mailing to the Post Office.

You will need:

- Your mail
- Signed and dated postage statement
- Your qualification report
- A check or cash to cover additional postage due if you are using Precanceled stamps or meter postage. You can also affix a meter strip to your postage statement to pay for the additional postage.
- A check for your annual mailing fee if the fee hasn't been paid.

## SCENARIO 7: Sending Email from GiftWorks

GiftWorks allows you to send email in one of two ways. The first option uses Microsoft Outlook. The second option allows you to send email through GiftWorks by configuring standard email settings to use your outgoing email server. This is similar to what you experience when setting up most email clients (like Microsoft Outlook Express, Mozilla Thunderbird, Eudora, Pegasus Mail, etc). This second option is only available in GiftWorks 2012 and newer. **NOTE: GiftWorks Anywhere does not have the option to send email using Outlook.**

Enter the mailing process by either using the **Send Mail** link in the Mailing Center, or by clicking a **Send Mail** link in the left menu while viewing a donor, donation, or SmartList. On the first step (Select Options) of the Mailing process, choose **Send Email**.

If this is your first time sending an email, you will need to configure the option you want to use. [Click Here](#) for more information on the Email Configuration process.

The screenshot shows the GiftWorks interface for configuring a mailing. The window title is "My Donor Data (Sample User) - GiftWorks". The top navigation bar includes icons for Back, Forward, Home, Donors, Donations, Volunteers, Live, Events, SmartLists, Mailings, Reports, Settings, and Help. The main content area is titled "MAILINGS" and "CHOOSE OPTIONS DONOR - DOE, JOHN". It features a progress bar with five steps: Select Options (active), Choose Recipients, Select Letter, Generate Mailing, and Finish Mailing. Under "Mailing Format", "Send Email (requires configuration)" is selected. An "EMAIL CONFIGURATION OPTIONS" box provides instructions and a link to configure settings. Under "Email Options", "Letter is included in the body of the email" is selected. The "Attachments" section has an "Add Attachment File" button. At the bottom, there are "Find Donor" and "Advanced Search" fields, and navigation buttons for "< Back", "Next >", and "Cancel".

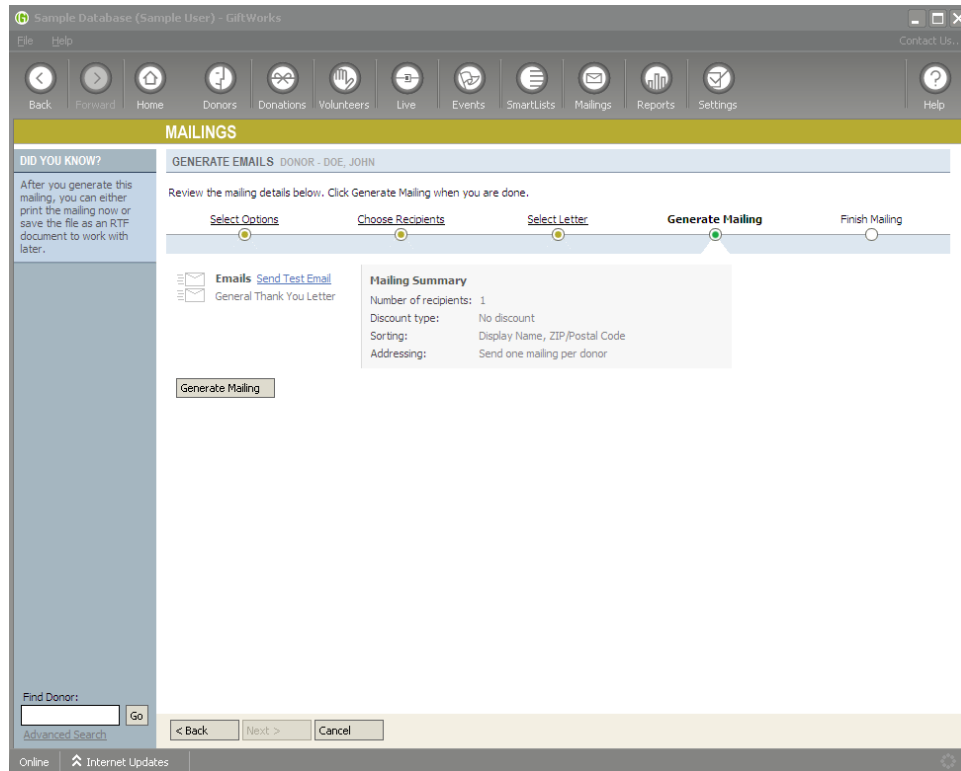
You can optionally add an attachment using the **Browse** button to the right of the **Attachment** option. There is no limit to the size of the file you can attach, but you should use caution when attaching files larger than 100 kb. Each email is sent out separately, so sending large files can take quite a long time and is likely not desirable for your recipients.

Click **Next** to continue.

Choose which recipients should or should not get the email. GiftWorks will warn you if there are recipients who do not have email addresses or have indicated they don't want to be emailed. You cannot select any recipients that do not have valid email addresses. When you have finished selecting your recipients, click **Next**.

The letter you use for the email is just like the letters you use for any other mailing. You can insert fields from your database and can format it however you like. Emails sent from GiftWorks will be sent in HTML format. Once you have selected and edited your letter, click **Next** to continue.

When you reach the Generate Emails step, you can send a test email by clicking the Send Test Email link.



Enter an address to send the test email to and fill in the **Sender Name** and **Address** and **Subject**, then click **Send** to send the test email.



The test email will be sent out with the information for the first recipient in the list merged in

from GiftWorks. When sending email from GiftWorks through Outlook, you must use your own email address as the **Sender Address**. If there is a problem with sending the email, it will appear in your drafts folder. If you open the email in the drafts folder and click **Send**. You should receive a message in your inbox explaining any problems with sending the email.

Click **Generate Mailing** to prepare the emails for sending, then click **Next**.

On the **Finish Mailing** step, click **Send Now** to send the emails through GiftWorks. Use the **Record this mailing** feature to save a record of the sending of the email to each recipient's mailing history.

The screenshot shows the GiftWorks MAILINGS interface. The main window title is "Sample Database (Sample User) - GiftWorks". The top navigation bar includes icons for Back, Forward, Home, Donors, Donations, Volunteers, Live, Events, SmartLists, Mailings, Reports, Settings, and Help. The "MAILINGS" section is active, showing a progress bar with five steps: Select Options, Choose Recipients, Select Letter, Generate Mailing, and Finish Mailing. The "Finish Mailing" step is currently selected. Below the progress bar, there is a section titled "Send Your Letter to Doe, John" with options for "Emails" and "Send Now". A table lists the recipient: "Doe, John" with email "john@adipreddogrescue.org" and status "Pending". Below the table, there is a "Record this mailing" checkbox which is checked. The "Record this mailing" section includes fields for Title ("Emailing 'Doe, John'"), Description, and When (Date: 5/3/2012, Time: 1:00 PM). At the bottom, there are buttons for "< Back", "Done", and "Cancel".

### IMPORTANT NOTE

Note that as emails go out, they will pass through the Drafts folder. It is only if they stay there that there is a problem with sending them. Try clicking Send/Receive (in Outlook) to send the emails before you begin researching whether this is a problem with sending.

When you click **Send Now**, you will be prompted for the sender information and subject of the email. Enter the information and then click **Send** to send your email.

**Send Emails**

**SEND EMAILS**

Enter the Sender and Subject for these emails. Click the Send button when you are done to send all the generated emails.

Sender Name:   
 Example: Mission Research

Sender Address:   
 Example: info@missionresearch.com What is this?

Subject:   
 Example: Mission Research Newsletter

When you have finished sending and recording your email, click **Done**.

### SCENARIO 8: PRINT LABELS AND PRINT ENVELOPES

If you have the need to create labels or envelopes only, you can do so with ease from the Mailing Center.

#### Print Labels

##### The Steps:

To enter the Mailing Center, click the **Mailings** button at the top of GiftWorks.

Sample Database (Sample User) - GiftWorks

File Help Contact Us...

Back Forward Home Donors Donations Volunteers Live Events SmartLists Mailings Reports Settings Help

**MAILINGS** Easily send and track your letters and emails

**DID YOU KNOW?**  
 You can send a mailing to any SmartList, or you can create a Mailing List by clicking Create A Mailing List below.

**RELATED ACTIONS**  
 Create a Mailing List  
 Manage Mailing Lists  
 Manage Letter Library  
 View Mailing History  
 Set Up Honoraria and Memorials

**MAILING CENTER**  
 Send a letter or email to any list, create and send receipts, print labels and envelopes, and more. The available options are based on your security settings.

**SEND MAIL**  
 Send custom letters and email to your donors.

**PRINT LABELS**  
 Print labels for one or more of your donors.

**PRINT ENVELOPES**  
 Print envelopes for one or more of your donors.

**DONATION MAILINGS**  
 > Donation Receipts (162)  
 > Donation Thank You Letters (201)  
 > Soft-Credit Thank You Letters (4)  
 > Pledge Thank You Letters (22)  
 > Matching Pledge Thank You Letters (2)  
 > Honorarium and Memorial Notifications

**MY FAVORITE MAILING LISTS** [MANAGE](#)

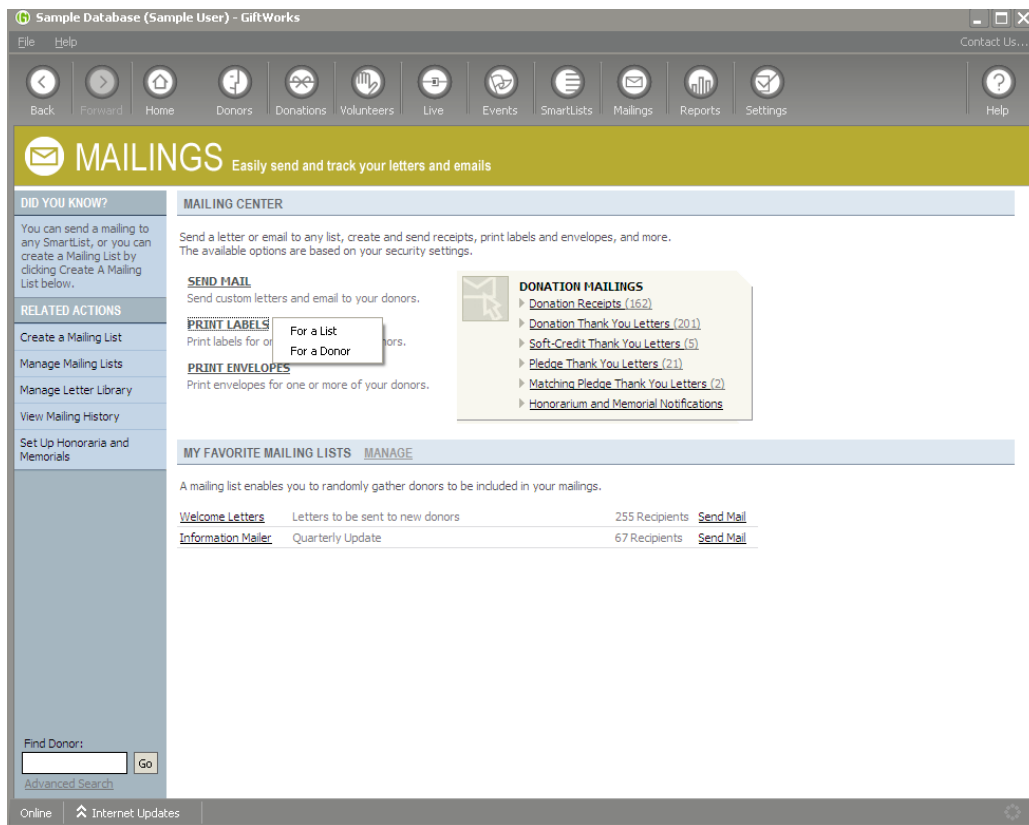
A mailing list enables you to randomly gather donors to be included in your mailings.

<a href="#">Welcome Letters</a>	Letters to be sent to new donors	255 Recipients	<a href="#">Send Mail</a>
<a href="#">Information Mailer</a>	Quarterly Update	67 Recipients	<a href="#">Send Mail</a>

Find Donor:    
[Advanced Search](#)

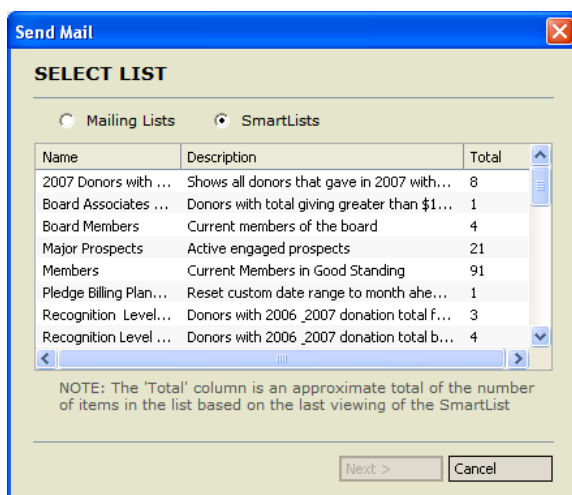
Online [Internet Updates](#)

In the main window of the Mailing Center, click on **Print Labels** and choose either **For a List** or **For a Donor**.



### Print labels for a list

Click on **For a List**, then select either **Mailing Lists** or **SmartLists**. Highlight the specific list you want to create the labels for and click **Next**.



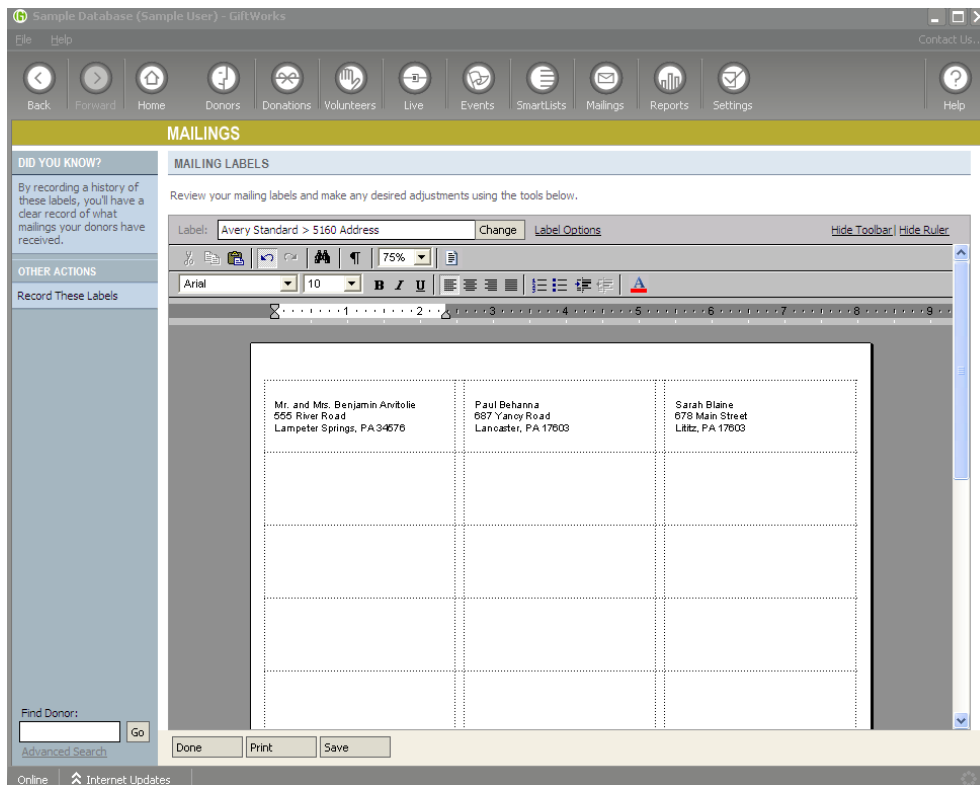
### Print labels for a Donor

Click on **For a Donor**. You will be provided with the search window to select your desired donor.

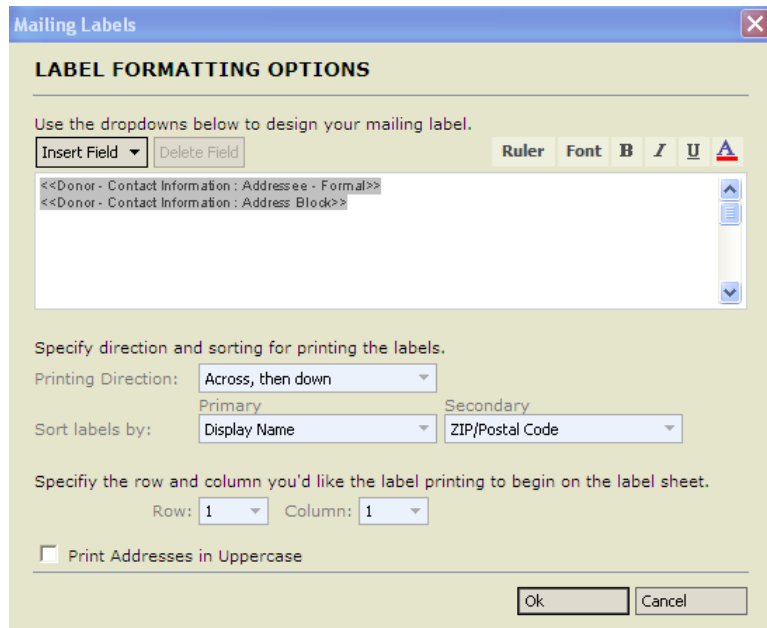




You can also **Print Labels** for any SmartList from the left menu when viewing the list. Whichever way you choose to begin your Print Label process, the remaining steps will be the same.



After your labels generate, you can choose a different label type by clicking "Change" next to the current type. You can also click on "**Label Options**" to format the labels and choose additional options for excluding Households or Members of Households. (Note if you chose to print labels for a donor, you will not see these additional options as they pertain to a list only)



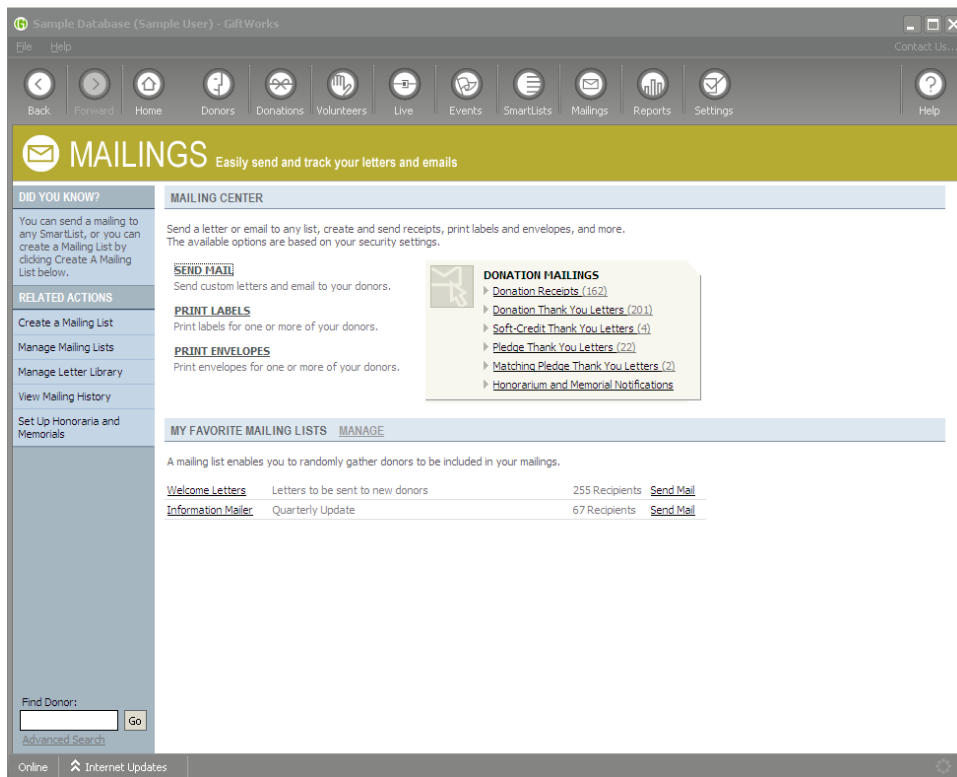
Here you can choose the fields to insert into the labels, change the font, and choose the printing direction and sorting options. Click OK when done and the labels will regenerate.

You can then Print or Save your labels. You also have the option to "Record these Labels" as well (on the left side of the screen)

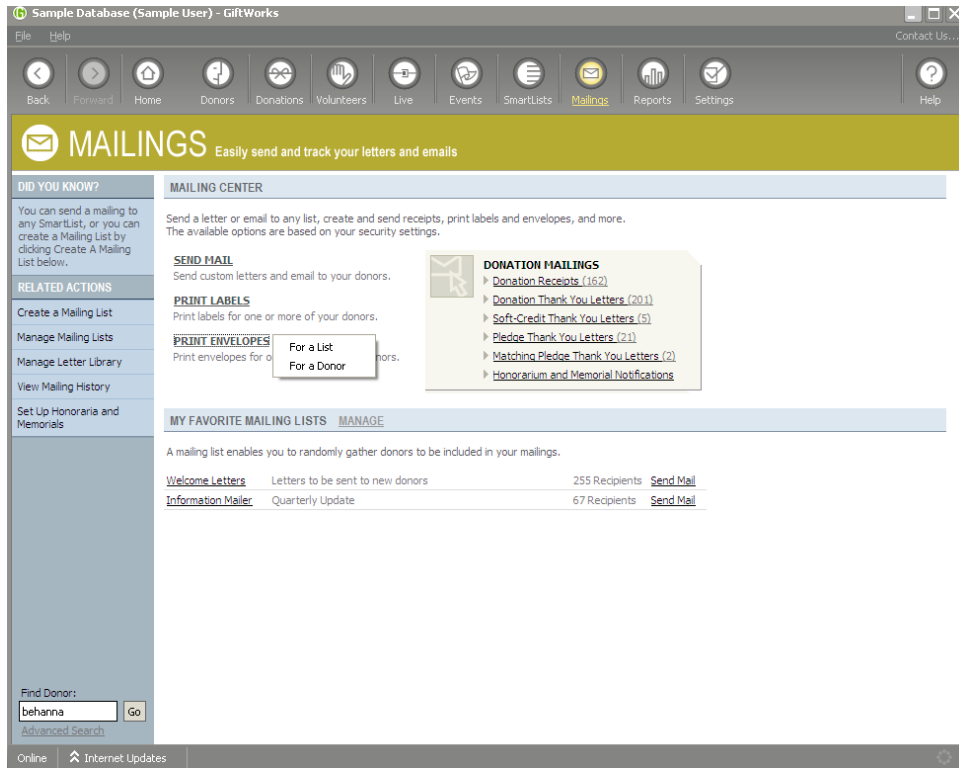
## Print Envelopes

### The Steps:

To enter the Mailing Center, click the **Mailings** button at the top of GiftWorks.

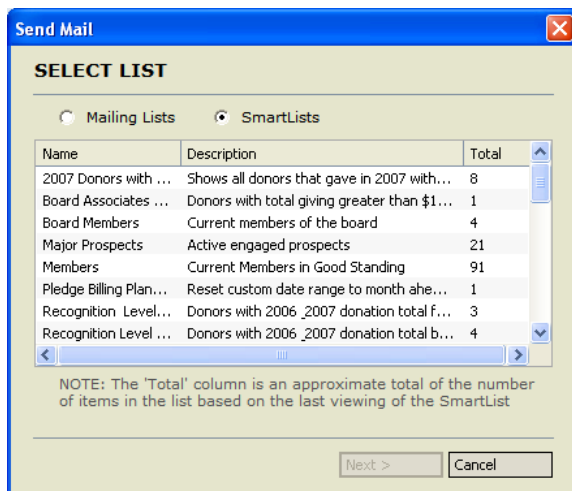


In the main window of the Mailing Center, click on **Print Envelopes** and choose either **For a List** or **For a Donor**.



### Print envelopes for a list

Click on **For a List** then select either **Mailing Lists** or **SmartLists**. Highlight the specific list you want to create the labels for and click **Next**.

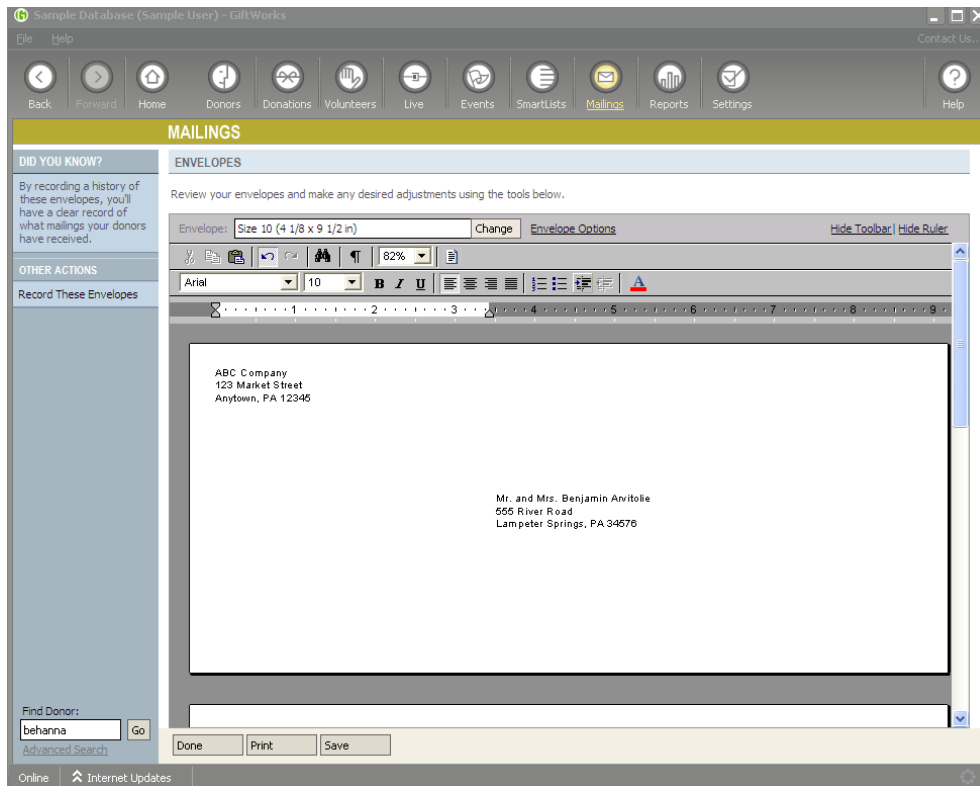


### Print envelopes for a Donor

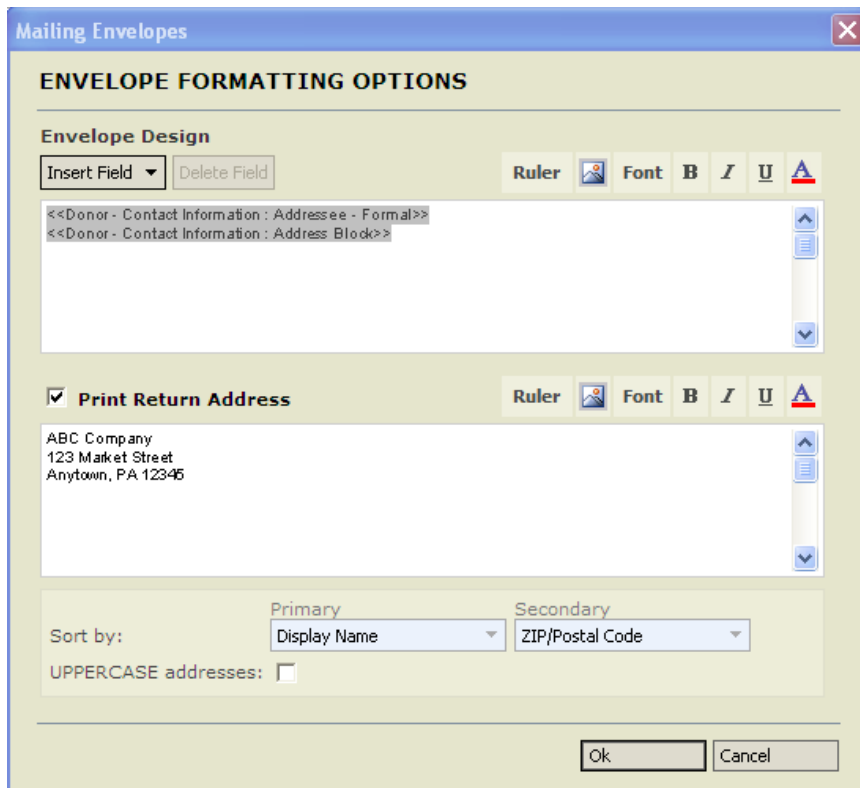
Click on **For a Donor**. You will be provided with the search window to select your desired donor.



You can also **Print Envelopes** for any SmartList from the left menu when viewing the list. Whichever way you choose to begin your Print Label process, the remaining steps will be the same.



After your envelopes generate, you can choose a different envelope size by clicking "Change" next to the current size. You can also click on "**Envelope Options**" to format the envelopes and choose additional options for excluding Households or Members of Households. (Note if you chose to print envelopes for a donor, you will not see these additional options as they pertain to a list only)



Here you can choose the fields to insert into the envelopes, change the font, add a Return Address and choose sorting options. Click OK when done and the envelopes will regenerate.

You can then Print or Save your envelopes. You also have the option to "Record these Envelopes" as well (on the left side of the screen)

## SCENARIO 9: SENDING MAIL WHEN VIEWING A DONOR

You can quickly create a letter or send an email when viewing a donor. Simply click on the Send Mail option under Mailing Tasks on the left side of the screen. From here you can choose to send mail To this Donor, About this Donor's Donations or About this Donor's Pledges.

The screenshot shows the 'DONORS' interface. On the left, there is a sidebar with 'RELATED ACTIONS' and 'MAILING TASKS'. Under 'MAILING TASKS', the 'Send Mail' option is selected, opening a dropdown menu with the following options: 'To this Donor', 'About this Donor's Donations', 'About this Donor's Pledges', 'Quick Email', and 'Quick Mail'. The main content area shows donor information for 'DASH, RACHEL', including a profile picture, name, and membership details. Below this, there are tabs for 'Summary' and 'Contact Info', and a section for 'Main Contact Info' with fields for Phone, Email, Assigned To, and Source.

**Send Mail>To this Donor:** This option will start the mailing process and allow you to send a letter from the **Donors** section of the Letter Library.

The screenshot shows the 'MAILINGS' interface. At the top, there is a header 'MAILINGS' and a sub-header 'CHOOSE OPTIONS DONOR - DASH, RACHEL'. Below this, there is a progress bar with five steps: 'Select Options', 'Choose Recipients', 'Select Letter', 'Generate Mailing', and 'Finish Mailing'. The 'Select Options' step is currently active. Below the progress bar, there are two sections: 'Mailing Format:' and 'Mailing Discount:'. The 'Mailing Format:' section has four radio button options: 'Send Email using Outgoing (SMTP) Server [configure](#)', 'Send Letters Only' (selected), 'Send Letters & Labels', and 'Send Letters & Envelopes'. The 'Mailing Discount:' section has three radio button options: 'No discount / First Class Mail' (selected), 'USPS Standard Mail Machinable Letters', and 'USPS Standard Mail Automation Letters'.

**Send Mail>About this Donor's Donations:** This option allows you to pick a date range to use to send a letter based on those donations for this donor.

**Donor Donations Mailing**

**SELECT DONATIONS TO INCLUDE**

Select the date range for the 'Dash, Rachel' donations to include and then click Next.

**Select the donation date range**

Date Range: Current Year

From: 1/1/2012

To: 12/31/2012

Next > Cancel

Click Next. This will start the mailing process and allow you to send a letter from the **Donations** section of the Letter Library.

**Send Mail>About this Donor's Pledges:** This option allows you to pick a date range to use to send a letter based on those pledges for this donor.

**Donor Pledges Mailing**

**SELECT PLEDGES TO INCLUDE**

Select the date range for the 'Dash, Rachel' pledges to include and then click Next.

**Select the pledge date range**

Date Range: All Dates

From:

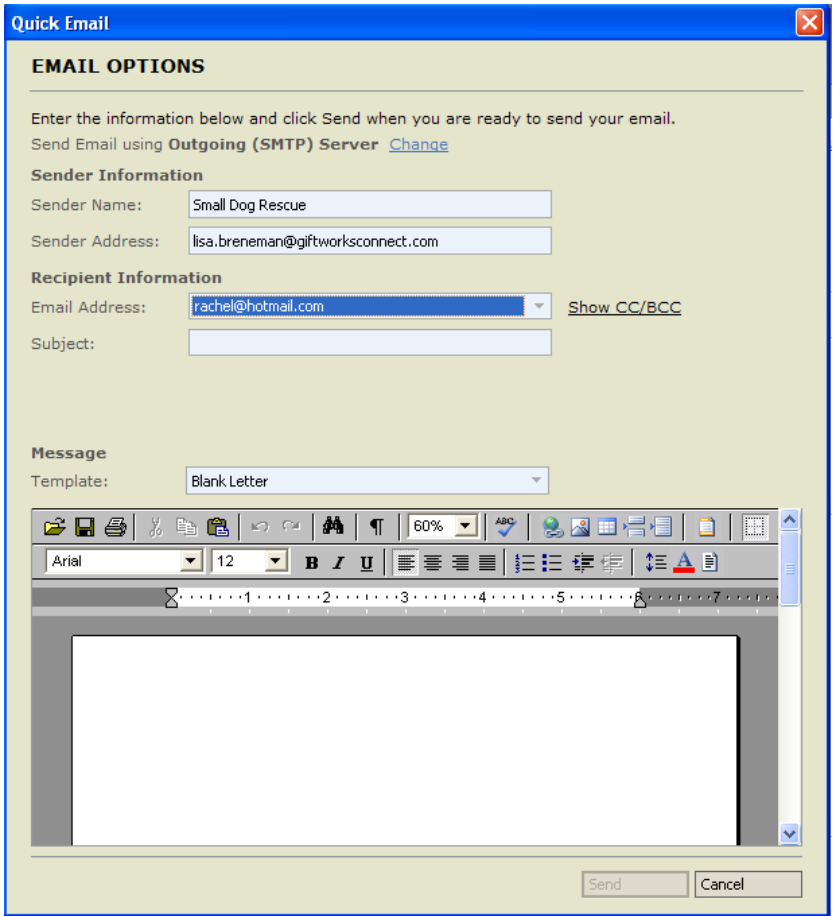
To:

Next > Cancel

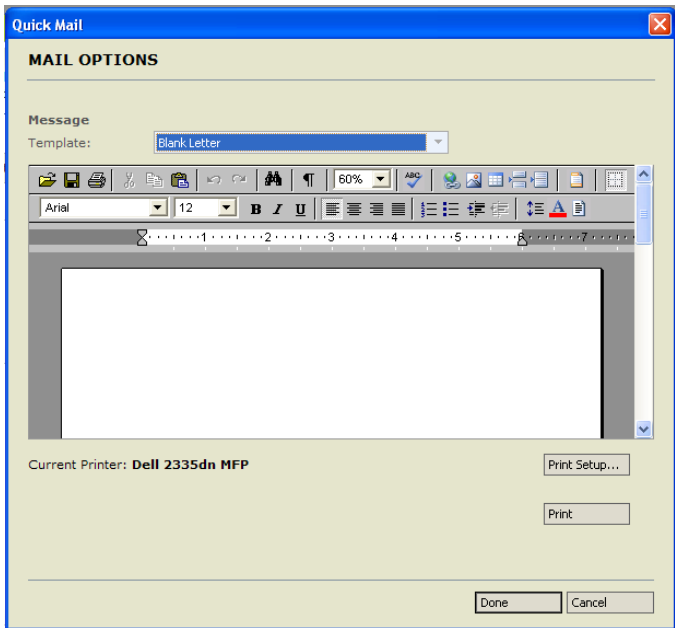
Click Next. This will start the mailing process and allow you to send a letter from the **Pledges** section of the Letter Library.

**Send Mail>Quick Email:** This option allows you to quickly send an email to this donor.



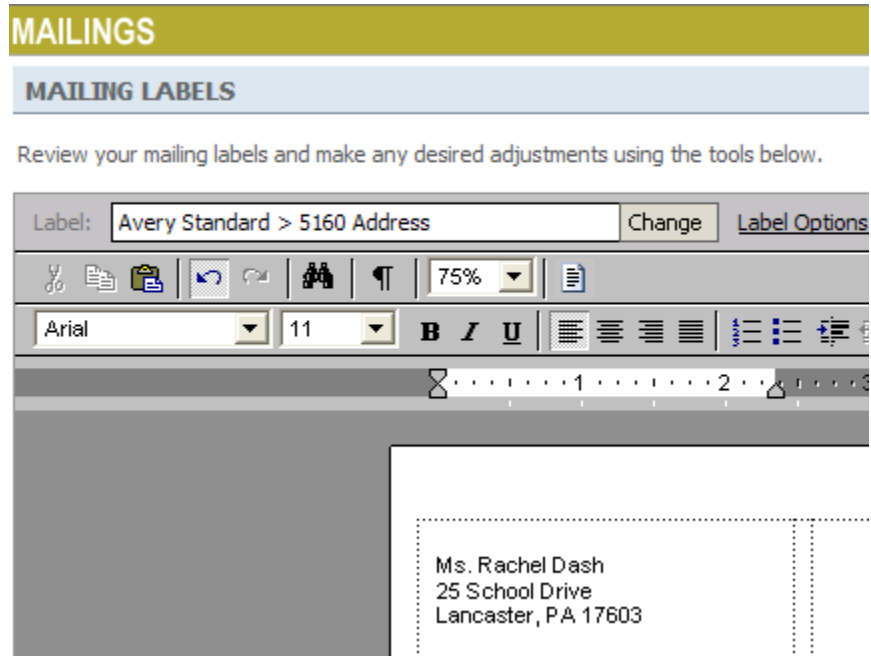


**Send Mail>Quick Mail:** This option allows you to quickly create and print a letter for this donor.

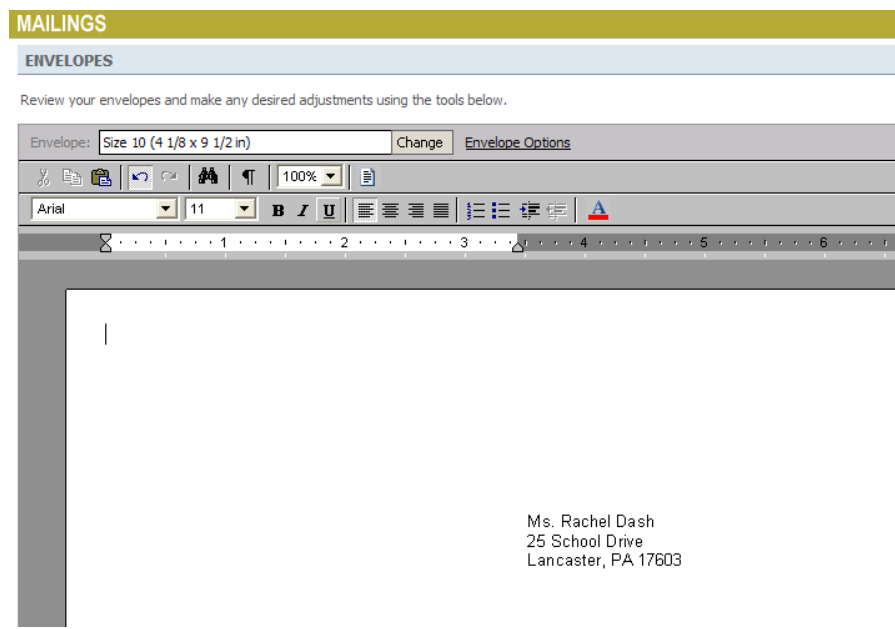


You can also quickly create a label or envelope for this donor as well.

**Print Label:** This option allows you to quickly create and print a label for this donor.



**Print Envelope:** This option allows you to quickly create and print an envelope for this donor.



**SCENARIO 10: SENDING MAIL WHEN VIEWING A DONATION OR PLEDGE**

You can quickly send mail when viewing a donation or pledge.

When viewing the **Gift** Details screen, you will see the following options under Related Actions **Send Mail** - you can send mail to this donor or for this donation.

RELATED ACTIONS	GIFT DETAILS
Delete this Gift	<b>GIFT OF \$550.00</b>
Edit this Gift	
Send Mail	
OTHER TASKS	<b>SUMMARY</b> To This Donor To This Donation

**Send Mail>To this donor:** this will start the mailing process and give you access to the letters in the DONOR section of the Letter Library.

**Send Mail>To this donation:** this will start the mailing process and give you access to the letters in the DONATION section of the Letter Library.

When viewing a **Pledge** Details you will see the following options under Related Actions. **Send Mail**- you can send mail to this donor or for this pledge.

RELATED ACTIONS	PLEDGE DETAILS
Edit this Pledge	<b>PLEDGE OF 4 PAYM</b>
Delete this Pledge	
Send Mail	
OTHER TASKS	<b>SUMMARY</b> To This Donor To This Pledge

**Send Mail>To this donor:** this will start the mailing process and give you access to the letters in the DONOR section of the Letter Library.

**Send Mail>To this pledge:** this will start the mailing process and give you access to the letters in the PLEDGE section of the Letter Library.

## **CONCLUSION**

The Mailing Center in GiftWorks is the hub of your communications with your donors. Maintaining frequent contact with your donors and recording and tracking those communications will help you build strong ongoing relationships.

You can determine which of your communications are the most effective in generating donations or other desired responses. You can then reuse, improve, or redo those communications as you repeat campaigns, appeals, and events from year to year.

Using the communication history with each donor, you can closely track how often you are touching your donors and can increase or decrease the frequency to optimize the return on your investment in sending out mailings.