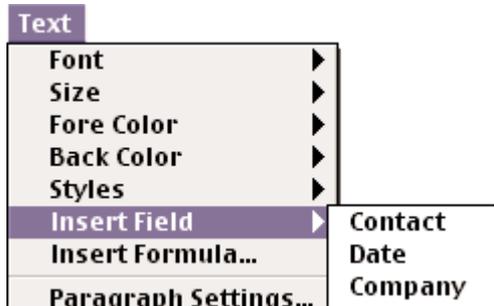


Create a personalized Letter/Email (Page 75)

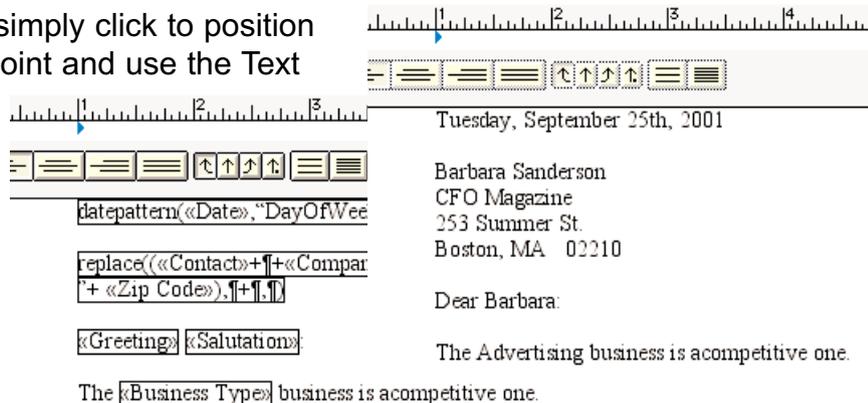
Personalize a letter for a single or mass mailing

The DEFAULT form letter in Correspondence is already personalized in that it merges the Contact name and address as well as the Contact's salutation as they are entered in the Contacts file. To further personalize a letter use the Insert Field or Insert Formula... options located in the Text menu.



Insert Field (page 75 - Merge Fields)

To add a sentence such as "We understand the Advertising business is competitive," or "Your Colorado clients will want to..." simply click to position your insertion point and use the Text menu, Insert Field sub-menu to insert the desired



field. You can choose any field from the fields listed and the information inserted will be the same data as is entered in the Contact's record.

Insert Formula (page 75 through 78 - Merge Formulas)

To print two completely different sentences in a form letter based on the Contact's Category where one reads "Thank you for your business" to your clients or "I'd like to show you what I can do" to your prospects, the following conditional formula would be used:

?(<Category> = "Client","Thank you for your business","I'd like to show you what I can do!")

There are three parts to a conditional formula; the condition (if category is equal to client), the true (what words print when the condition is true) and the false (what words print when the condition is not true).



To create this type of Conditional formula do a Cmd/Ctrl-M, once or twice depending on which window you're currently in, until you're viewing the Correspondence:Alternatives window. The above formula will already be displayed as a default. It is a Basic Conditional formula.

Highlight and delete the formula then choose Conditional from the Basic Formula Popup menu button. To change the formula highlight the field name **Category** and choose **Value** from the Field Names popup. Replace the **equal sign (=)** with a **greater than sign (>)**. Replace "**Client**" with the number **8**. (Note that you're removing the quotes around the word Client also. Quotes go around text not numbers.) Replace "**Words to clients**" with "**You are a valued customer.**" (Note that the quotes remain.) Replace "**Words to everyone else**" with "**It's been a while since you've called on us.**" A final few steps.... highlight and copy the formula. Do a Cmd/Ctrl-L to go to a Letterhead window. Click in the body of the letter and paste. Highlight the formula once again from the question mark to the last close parenthesis then from the Text menu, Styles submenu choose Formula merge. The formula now displays with a box around it.

If you have an error such as missing a parenthesis, or missing quote be sure the formula reads exactly...

? («Value» = 8, "You've been a valued customer", "It's been a while since you've called on us")

Play with the Alternatives window formula button and see what you can come up with. There's much more information starting on page 75 of your HindSight User's Guide.

Panorama Handbook PDF

We've explored how to use the Alternatives window's formula buttons to build some basic formulas, however if you use the Text menu's Insert Formula you have full access to Panorama's formulas. Feel free to play with them on a test letter. Your HindSight version 4.0 CD contains full documentation of these formulas in the Panorama Handbook PDF file.

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