



# Printing Labels for CSA Follow Up Letters



**Completing necessary clean-up steps:** Receiving correspondence containing the name of a divorced or deceased family member can be very painful for the surviving family members. Before you send any CSA follow-up letter, you should review these views and rectify these potentially painful situations.

1. **DO NOT run Follow up labels/letters in January. The process only works after February.**
2. Click **Contacts** and click the view **Fix: Households w/ Deceased Contact** If you have any families that contain deceased Heads of Household, you must run the DPT.
3. Click **Contacts** and click the view **Fix: Divorced Heads in same Household** If you have families that contain both divorced (or separated) Heads of Household, you must either:
  - Move one of the spouses to his/her own household marked as Head of Household. **Or,**
  - Mark one of the spouses as **Other Adult** and change his or her **Contact Status** to **Inactive**. The remaining spouse should remain the only Head of Household

## Printing the Labels

- 1) **Important:** Clear any sticky/saved selections:
  - a. Click **Home** on the left menu and click **My Selections** on top of screen.
  - b. Check the **check box** at the bottom of the screen to select everything.
  - c. Click the **Actions** button and choose **Clear** and then **click the Clear** button.
- 2) Choose the follow-up approach that best fits your needs from the bulleted list below
  - **Those who have not yet given to this year's CSA**
    - a. Click **Contacts** and choose the **CSA – Never Given view**
  - **Those who gave last year but not this year (LYBUNT)**
    - a. Click **CSA or Other Campaigns** and choose **CSA BUNT Families**.
    - b. Choose the **LYBUNT** view.
    - c. Check the box in the lower left to select all records. (This is one time where we WANT sticky selections.)
    - d. Click **Contacts** on the left menu.
    - e. Choose the view named **CSA BUNT Selected Families**.
    - f. Check the box in the lower left to select all records.
  - **Those who gave to some past CSA but not this year (SYBUNT)**
    - a. Click **CSA or Other Campaigns** and choose **CSA BUNT Families**.
    - b. Open the **SYBUNT** view.
    - c. Check the box in the lower left to select all records. (This is one time where we WANT sticky selections.)
    - d. Click **Contacts** on the left menu.
    - e. Choose the view named **CSA BUNT Selected Families**.
    - f. Check the box in the lower left to select all records.

- 3) Click the check box at the bottom left to select everyone on the list or check mark specific people as needed.
- 4) Click the **Reports** button and choose **Selected Labels: 1 Per Family -Erie.**
- 5) Choose a **Greeting Type** from the drop-down list.

The screenshot shows a web browser window with the URL <https://my.eriercd.org/mp/ReportViewer/ViewReport.aspx?ReportID=283&PageID=292&GlobalFilterID=2&SelectionI>. The interface includes several filter sections:

- Greeting Type:** Heads of House: Formal
- Omit If Any Contact Has Email:**  True  False
- Left Space Adjustment:** No Adjustment
- Address Filter:** All Records
- Sort Order:** Name
- Omit Bulk Mail Opt Out:**  True  False

Navigation and utility icons are visible at the bottom, including a page indicator (1 of 1), a refresh button, a back button, a zoom level of 100%, and buttons for save and print.

**Note:** The **Left Space Adjustment** option is available if labels print too close to the margin on your printer. Using this option you can add 1, 2 or 3 spaces to shift your labels slightly.

- 6) Choose a **Sort Order** from the drop down list.
- 7) Put a dot next to **True** for **Omit Bulk Mail Opt Out** so you don't include people who have requested you not send them mail.
- 8) Click the **View Report** button.
- 9) Click the **Print** button to print your labels.
- 10) **Important:** Clear your selections
  - a. Click the arrow next to **All Records** in the lower right corner and choose **Current/Unsaved Section.**
  - b. Click the **x** to deselect your contacts.

