

1 - MUMS/2000 Merge Letters

Use of MUMS for Dues & Political Action Letters

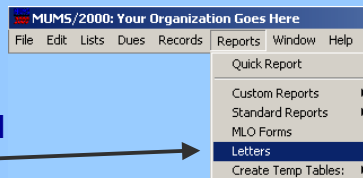


CWA On-Web Courses are found at
www.CWA-Secy-Treas.org

Prerequisite: "How-to-Use" On-Web Course

2 - Course Objectives

Custom Generated
Merge Letters



- Membership Communications by Status
- Dues / Delinquency
- Political Action Campaigns

3 – Select & Create Letters

The 'Process Letters' window has a title bar with standard window controls. It features a list box on the left with the entry '* CD-24 GOTV Letter'. To the right, the 'Details:' section contains three fields: 'Title' with the value 'CD-24 GOTV Letter', 'Letter Description' with the value 'Letter to Members in Congressional District 24 in California', and 'Recipient Description' with the value 'Status Codes 10-19'. Below these fields is a row of buttons: '<', '<<', '>>', '>', '+', '-', '✓', and 'X'. To the right of these buttons are 'Prepare' and 'Update Status' buttons. At the bottom is a tab bar with 'Select/Create Letter', 'Edit Text', 'Select Recipients', and 'Edit Format'. A 'Close' button with a red X icon is at the bottom right.

Create New Letters or
select an existing
format

Give the
Letter a title, a
description of
letter and a
description of
recipients

4 - Edit Text or Body of Letter

The 'Process Letters' window is shown with the 'Edit Text' tab selected. The 'Body of Letter:' section contains a text area with the following text: 'Please be sure to go to the Polls and vote for Brad Sherman. He has been a supporter of our labor goals for all of his congressional career. Remember Vote on November 6th...'. The bottom tab bar shows 'Select/Create Letter', 'Edit Text', 'Select Recipients', and 'Edit Format'. The 'Close' button is at the bottom right.

Create/Edit body
of this specific
merge letter

5 - Select Recipient Options

- Status-Only Based Letter
- Dues Delinquency Based Letter
- Political Jurisdiction Based Letter

Process Letters

Selection Criteria:

☒ Status
☐ Dues
☐ Political Action

Advanced:

☐ Include SQL text
 Edit SQL
☐ Update Status to:
 Test

Status Codes:

☒ All ☐ Include Selected ☐ Exclude Selected

Code	Description	Selected
01	Ext Org - Cold Lead	<input type="checkbox"/>
02	Ext Org - Tried to Contact	<input type="checkbox"/>
03	Ext Org - Undecided Person	<input type="checkbox"/>

Select/Create Letter / Edit Text / Select Recipients / Edit Format / Close

6 - Dues Delinquency Selection

Process Letters - CD-24 GOTV Letter

Selection Criteria:

☐ Status
☒ Dues
☐ Political Action

Advanced:

☐ Include SQL text
 Edit SQL
☐ Update Status to:
 Test

Dues Paid Thru Dates:

☐ All ☒ Selected

☒ More Than 2 Months Delinquent
☒ Less Than 6 Months Delinquent

Status Codes:

☐ All ☒ Include Selected ☐ Exclude Selected

Code	Description	Selected
10	MEMBER - GS	<input checked="" type="checkbox"/>
11	MEM GOOD STN	<input checked="" type="checkbox"/>
12	MEM GOOD STW	<input checked="" type="checkbox"/>

Select/Create Letter / Edit Text / Select Recipients / Edit Format / Close

Select Range of Delinquency

Include/Exclude by Status Code

Can change Status during process

7 – Select for Political Action

Selection Criteria:

- ☐ Status
- ☐ Dues
- ☒ Political Action

Advanced:

☐ Include SQL text

Edit SQL

Test

Select/Create Letter / Edit Text / Select Recipients / Edit Format / Close

Select Members associated with elected official:

Brad Sherman

Name	State	Type	Position
Barbara Boxer	WA	State Upper	124
Brad Sherman	CA	Senate	Senate2
Dianne Feinstein	CA	Congress	24
E. Debs	CA	Senate	Senate1
Jill Smith	WA	Congress	12
Lower 1	CA	City	Council
Lower 2	WA	State Lower	123
	WA	State Lower	124

1st Select Political Jurisdiction

8 – Select for Political Action - Continued

Selection Criteria:

- ☐ Status
- ☐ Dues
- ☒ Political Action

Advanced:

☐ Include SQL text

Edit SQL

Test

Select/Create Letter / Edit Text / Select Recipients / Edit Format / Close

Select Members associated with elected official:

Brad Sherman

Status Codes:

☐ All ☒ Include Selected ☐ Exclude Selected

Code	Description	Selected
10	MEMBER - GS	<input checked="" type="checkbox"/>
11	MEM GOOD STN	<input checked="" type="checkbox"/>
12	MEM GOOD STW	<input checked="" type="checkbox"/>

2nd Select Members by Status Code

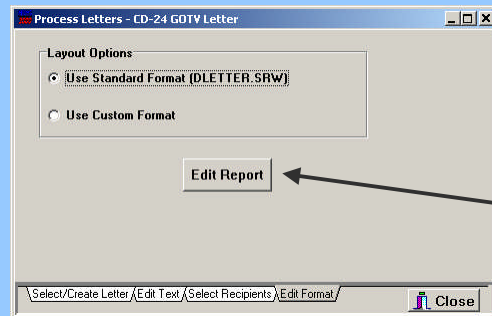
MUMS/2000: Yo...

5 Members Selected.

OK

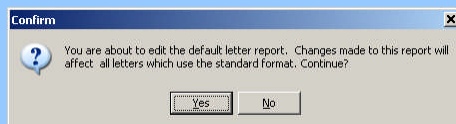
3rd Press TEST button to see Selection Results

9 – Edit Master Format



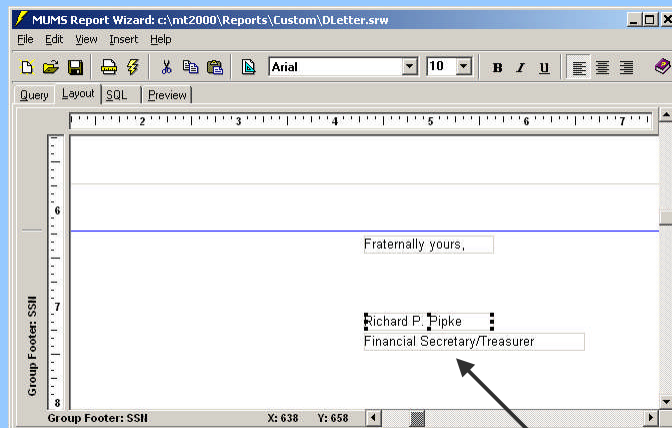
This is normally only done once to setup for a local

There is option to use a custom format for this letter.



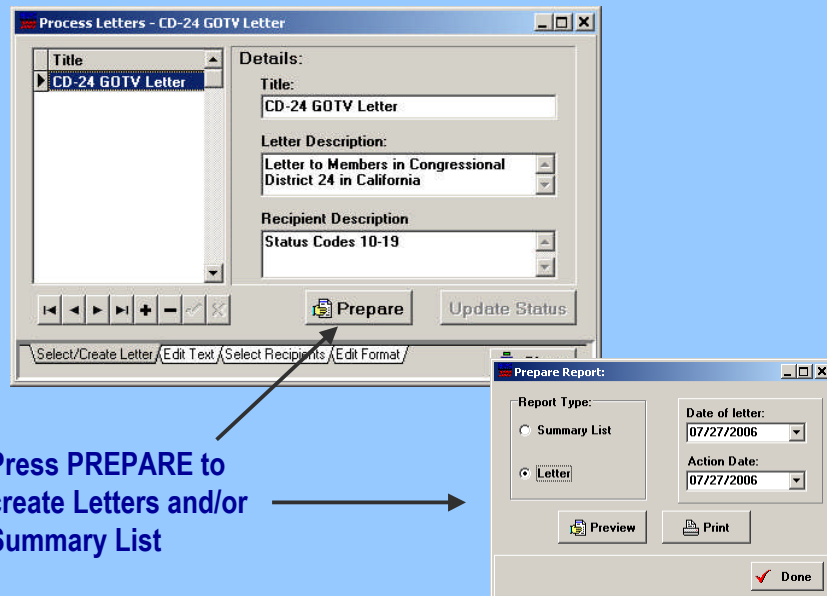
Warning issued if you change Default format for all letters.

10 – Editing Default Format

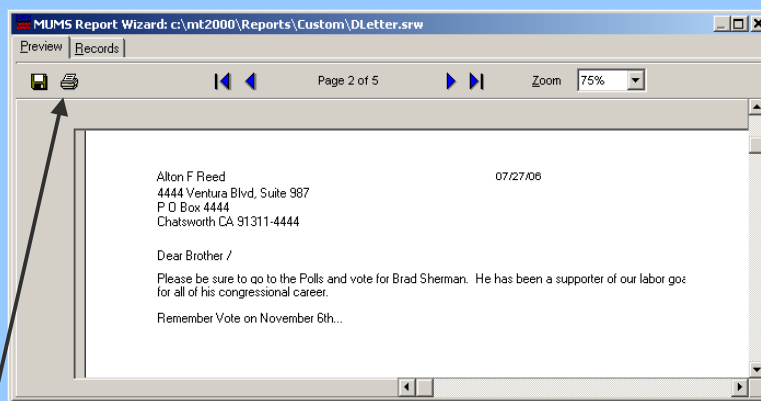


At a minimum you must update signature block

11 – Prepare Letters

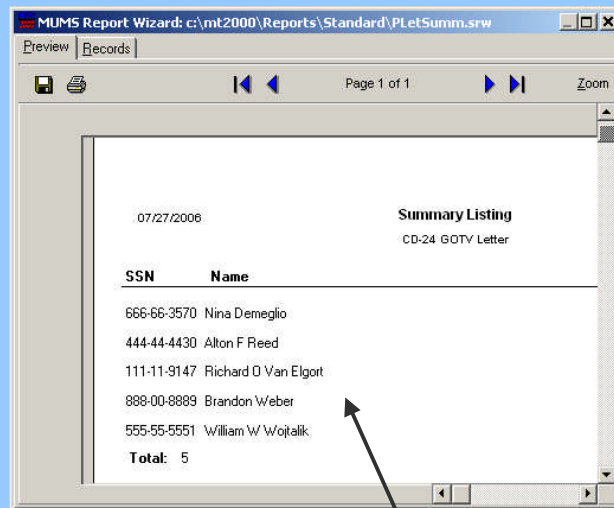


12 – Letter Output



This is example of Preview of the merged letters. You can print from this screen or you could of printed from prior screen using PRINT instead of PREVIEW

13 – Summary Output



The screenshot shows a window titled "MUMS Report Wizard: c:\mt2000\Reports\Standard\PLetSumm.srw". It has tabs for "Preview" and "Records". The "Preview" tab is active, showing a "Summary Listing" for "CD-24 GOTV Letter" dated "07/27/2006". The listing is a table with two columns: "SSN" and "Name". It contains five entries and a total count of 5.

SSN	Name
666-66-3570	Nina Demeglio
444-44-4430	Alton F Reed
111-11-9147	Richard D Van Elgort
888-00-8889	Brandon Weber
555-55-5551	William W Wojtalk
Total: 5	

This is a list of the generated letters

14 - End of Course

Thanks you for using this CWA On-Web Course



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