

Managing Mailing Lists for 499s

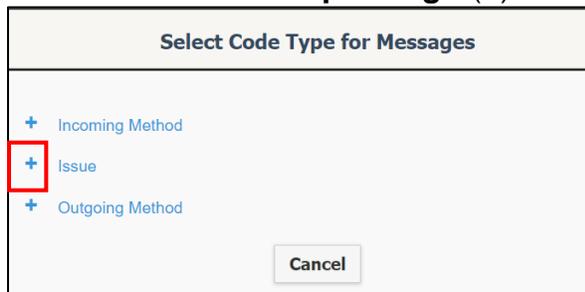
Market: House

Description: The term **499** refers to the maximum number of unsolicited mailings an office can send that do not require approval by the Franking Commission during a campaign blackout period.

These instructions teach users how to create issue codes, audiences, and Form Letters that are specific to a 499-mailing list. These activities help offices better manage different ongoing 499 mailings preventing subscribers from receiving multiple messages per campaign blackout period.

Create and Set Up the Issue Code

1. From the Messages module of the Big Menu under the Utilities column select **Codes**.
2. Next to issue click the **plus sign (+)**.



3. The Add Issue Code box appears.
4. In the Code ID Field enter a meaningful title for the issue code.

Note: For 499 activities, a recommended approach is to use a naming convention similar to the one below.

 - a. **Z:** simply pushes this code to the bottom of an alphabetized list.
 - b. **499:** refers to the type of mailing category
 - c. **SUMMER:** refers to the season of the campaign. In this example, it is during summer.
 - d. **22:** refers to the campaign year
 - e. **MAILING:** refers to the activity
5. Click **Save**.

Create and Set Up the Audience

1. From the Contacts module of the Big Menu under New select **Audience**.
2. In the **Title field**, type use the same name as the issue code created for this 499-mailing list.
3. Click **Add to Menu as "Saved Search"**.

Create and Set Up the Form Letter

Option 1: Create the Form Letter for the Campaign

1. From the Messages module of the Big Menu under New select **Form Letter**.
2. In the **New Form Letter Name** field type the same name of the issue code created for this 499. Click **Add**.

3. Under Issues enter the appropriate **Issue code** created in the **Create and Set Up the Issue Code** step
4. The draft Form Letter window appears. Click **Edit Content** to modify information within the Form Letter.

Library » [Results](#) » Form Letter

Draft Form Letter -- Z.499.SUMMER.22.MAIL v. 1

General | Fill-Ins / References (0) | Format | Messages (6) | Log (8)

Form Letter

Name: Z.499.SUMMER.22.MAIL Draft

Type: Form Letter Email View Printed View

Issues: Select issues ... Add to Message

Attachments: View

Edit Content

5. Click **Approve** or **Request Approval** based on account permission and office procedures.

Form Letter

Name: Z.499.SUMMER.22.MAIL Draft

Type: Form Letter Email View Printed View

Issues: Select issues ... Add to Message

Attachments: Approved

Draft
Inactive
Request Approval
Denied Approval

6. Click **Save**.

Option 2: Create Form Letters for Different Mailing List of the Campaign

1. From the Messages module of the Big Menu under New select **Form Letter**.
2. In the **New Form Letter Name** field, use the same naming convention but add the affiliation codes related to the target mailing list.

For example, these Form Letters are used for the 499s scheduled during the Summer of 2022 but for different audiences:

Add Form Letter

New Form Letter Name: Z.499.SUMMER.22ARMY

Type: Form Letter

Directory: Form Letters Add

- a. Z.499.SUMMER.22ARMY
- b. Z.499.SUMMER.22NAVY
- c. Z.499.SUMMER.22AIRFORCE

3. Click **Add**.

- The draft Form Letter window appears. Click **Edit Content** to modify information within the Form Letter.

- Click **Approve** or **Request Approval** based on account permission and office procedures.

Create the Targeted Mailing

- From the Outreach Module of the Big Menu under New select **Targeted Mailing**.

- Select **All Form Letters**.

- Scroll down the list and find the Form Letter created above. Click **Select**.

- The Outreach Newsletter wizard is displayed on the screen. Click **Select Audience**.

- In the **Start With** field, select the appropriate Audience Builder list.

- Complete the other fields as needed.

- In the Exclude column:

Affiliations: Insert affiliation codes for subscribers who opted out of mailing list.

Issues: Insert issue codes for past 499 mailings with similar audiences.

Outreach » Newsletter ID# 100469

Change Layout > Content > Select Audience > Review Actions Save Review >

Select Your Audience With all of these attributes

Name: 100469 - 04-12-2022 Outreach

Start with: Audience Builder: Z.499.SUMMER.22.MAIL

Postal Filter: Individual - Includes all Contacts that meet the selected criteria

Salutation: Formal

Audience Selection: Use the entire audience [Review Audience Size](#) Include Non-Primary Emails in CC

Include only contacts with ALL of these attributes...

- Affiliations
- Issues
- Form Letters
- Special Rules
- Geographic

[Show Less Criteria...](#)

Exclude contacts with ANY of these attributes...

- NO.MAIL - DO NOT CONTACT (12) or EMAIL.OPTOUT - UN-Subscribed to Newsletter (44) or
- MM.OPTOUT - Opt Out 499 or Franked Mass Mailing (15) or DECEASED - Deceased (45) or
- MOC.ALL - Member of Congress (548)
- Issues
- Form Letters
- Special Rules
- Geographic

8. Click **Save**.
9. Click **Review**.
10. Under the Start: Drop down menu select the appropriate:
 - a. **Build Only:** IQ will build the mailing but not send.
 - b. **Build and Split into Printed and Email:** IQ will build the mailing and split into Email and Print based on the contacts preferences.
 - c. **Build and Print:** IQ will build the mailing and send to printer.
11. Repeat the process with additional audience lists.