

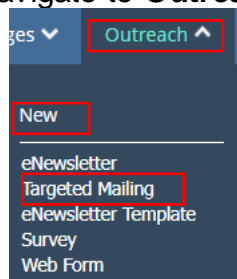
Create and Print an Outreach Postal Mailing

Market: Federal/State/Local, House, Senate

Description: These instructions teach users how to send printed outreach materials.

Create an Outreach Postal Mailing

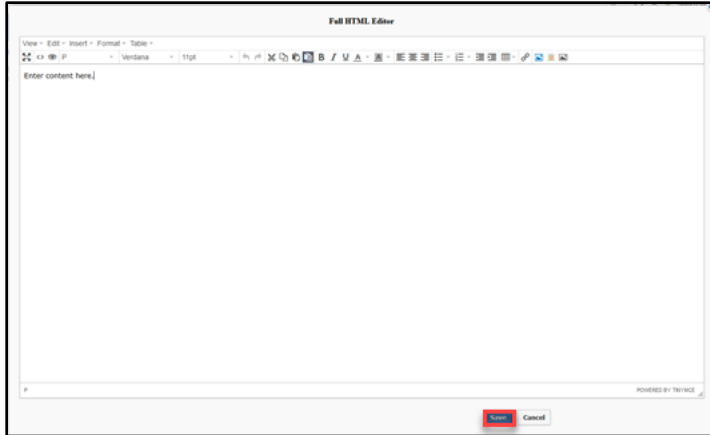
1. Navigate to **Outreach > New > Targeted Mailing**.



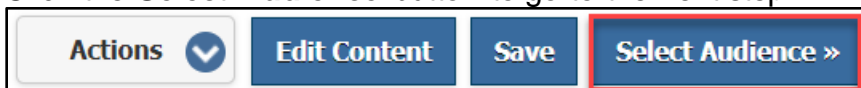
2. Choose the content type (e.g., **HTML Form Letters**, **All Form Letters** or **Form Letter Template**) that is appropriate for this mailing. In this example, we will use **Form Letter Template**.
3. Search for and click the form letter or format link. Click **Select**.

 A screenshot of a web application interface for selecting a form letter template. At the top, there are three tabs: 'HTML Form Letters', 'All Form Letters', and 'Form Letter Template', with the last one being active. Below the tabs, the title 'Form Letter Template' is displayed. To the right of the title are 'Select' and 'Cancel' buttons. Below the title is a description: 'Create a new postal mailing starting with an approved form letter template.' Underneath is a search bar with a magnifying glass icon. Below the search bar, there is a list of template options: 'Default Moderate Margins - 11pt .7in v.1', 'Default Narrow Margins - 10pt .5in v.1', 'Default Template - 12pt 1in v.1', and 'Gold Stationary Eagle v.1'.

4. The Full HTML Editor page is displayed. Enter or paste the content of your letter. Use the editor options to insert images and determine formatting. Click the **Save** button to save your content and close the HTML Editor.



5. Click the **Select Audience** button to go to the next step.



6. The **Start With** field defaults to *All Contacts with Email Addresses*. You may select an existing Audience or create a new audience in the Include and Exclude Criteria fields.

7. From the **Postal Filter** select from the following:
- Individual*: one record per contact in the audience
 - Household*: one record per family
 - Head of Household*: one record to the contact notated as head of household
 - Unique Address*: one record for the same mailing address.

Postal Filter:

Individual - Includes all Contacts that meet the selected criteria

Individual - Includes all Contacts that meet the selected criteria

Household - Includes one record from each household

Head of Household - Includes the head of each household

Unique Address - Includes a single record per mailing address

8. Click the **Review** button to go to the next step.

Actions

Save

Review »

9. In the **Start** field, select from the following:

Build Only: IQ will build the mailing and you will have to come back later to manually print

Build and Split into Printed and Email: IQ will build and email the mailing to those with valid email addresses and print the mailings for those without email addresses.

Build and Print: IQ will build and print the mailing

Start:

Build and Print

Build Only

Build and Split into Printed and Email

Build and Print

10. Click the appropriate button to complete your build.

Actions

Save

Build »

Actions

Save

Split »

Actions

Save

Print »