

Campaign Finance Reporter Technical Bulletin

Letter Writing in Campaign Finance Reporter

Terminology

Entity

A person, business or registered entity

Receipt

A transaction of money or goods coming in to the user committee

Letter

A document you can create that will be merged with selected data from the committee's database.

Selection Criteria

Statements you can create using a dialog form that will specify limits on the entities that will be merged with a letter you create.

Entity-based letters vs. receipt-based letters

Letters use two main tables for their variable information, the Entity table and the Receipts table.

A letter can use only Entity information and would still make sense.

A letter using only Receipt information would be meaningless since it would have receipt information, but no identifying entity information.

The relationship between Entities and Receipts.

An entity exists in your database only once, so a strictly entity-based letter will result in a single letter per selected entity. A single entity may have multiple receipts in your database, so a receipt-based letter may result in multiple letters for a single entity.

An entity-based letter prints one letter per entity meeting the selection criteria.

A receipt-based letter prints one letter per receipt where the receipt AND the Entity information match the selection criteria.

Designing Letters

Use the Mail Merge/Create Letters menu items.

Note that certain documents, such as Political Contribution Refund Receipts and labels are pre-defined. You do not need to first set these up with the Create Documents feature.

Designing an entity-based letter

Examples would include some fundraising letters, get out the vote letters.

Use only the date field, the Name and Address Fields, and the Other Entity Fields.

You may also use the SOS (Secretary of State) data fields if you have imported entities from a SOS CD-ROM.

Designing a receipt-based letter

You may use all of the fields for an entity-based letter, plus the receipts fields.

Note: Using any receipt field automatically causes the letter to be receipt-based.

Limiting the number of letters that will print using Selection Criteria

Selection criteria is based on Boolean Algebra.

The world of TRUE, FALSE, AND, OR and logical comparison operators.

The Operators:

=	equals
<	is less than
>	is greater than
<>	does not equal
<=	is less than or equal to
>=	is greater than or equal to

We design selection criteria to limit the subset of records that will be selected for our letter.

Creation of a sample thank-you letter:

Letter text – to be created using DataMerge/Create Documents.

Give the letter a name and it will be saved for re-use.

Create the letter by typing text and selecting variable fields from the drop down menu items at the top of the form. Variable fields are shown in < > brackets and will include merge data when the letter is printed.

A sample letter:

<Date>

Dear <Joint Salutation - Formal>

Thank you for your contribution in the amount of <Receipt Amount>, which we received on <Date of Receipt>.

You can be sure that your donation will be used wisely to advance John Doe to the Minnesota Senate.

Sincerely,

Mary Doe, Treasurer

Use Selection criteria to limit who the letter is sent to.

Criteria to use for this letter:

Entity Type = IND (To people only, not other entities)

Receipt Amount > 0 (Only those who have given us more than 0)

Thank You Letter Sent = False (Only those receipts for which we haven't sent a thank you letter)

When printing, select the check box "One letter per couple".

Note:

This letter and selection criteria work if all of your receipts are either:

- 1) Joint receipts from couples who are joined in the system, or
- 2) Individual receipts from people who are not joined to another individual.

A problem arises if a joint entity makes a donation that is not in participation with the other person. In such a case, you will need to do two letters, one for joint entities and one for individuals.

The Joint letter will be the same as above, with the addition of:
Joint Receipt = True.

The individual letter will use the same criteria as above, but with the addition of:
Joint Receipt = False.

The individual letter text will be as above, except that instead of using the <Joint Salutation – Formal> structure, you will use one of the following:

Dear <First Name>,

Dear <Prefix> <Last Name>, - note, this works only if you entered prefixes in the application, such as Mr., Mrs. Since most people do not consistently enter prefixes, this may not be a good option.

Dear <First Name> <Last Name>,