

To use the Letter Usage Report:

• Select Office Setup in the Side Menu then click Form Letters.

• Enter search criteria in the **Search Form Letters** window for the selected form letter.

🖉 SmartOffice We	bpage Dialog	×	
Search Form Letters			
Title			
Keyword	v		
Purpose	All		
Created By			
Include These Document Types			
Form Letters	Envelopes 🗸		
Labels	Headers/Footers		
Templates			
Search	Add Close		
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Figure 1: Search Form Letters window

• Click Search.

• SmartOffice will display a summary list of all form letters meeting your search criteria.

• Tag the selected form letter.

• Click the Form Letter Usage Report button in the toolbar.

• Enter criteria for the Form Letter Usage Report in the Form Letter Usage Report window.

• Use the **Pick a Date** buttons to select a date range for your report. If no dates are entered, SmartOffice will generate a report displaying a list of all contacts who have ever received the selected form letter.

• Use the **Add to Set** button to add the contacts who have received the selected form letter to a set of your choice.

• After entering criteria for the Form Letter Usage Report, click OK.



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Form Letter Usage Report				
 This function displays a list of all contacts that the current form letter was mailed to within the specified date range. If you do not specify a date range, the system will list all letters for all contacts. 				
From				
То	Ĩ			
ОК	Add to Set Cancel	_		
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Figure 2: Form Letter Usage Report window

• The Form Letter Usage Report will display a list of all contacts who were sent the selected from letter and when the form letter was printed.

• From within the Form Letter Usage Report, contacts can be tagged and added to a set using the **Add to Set** button.

• If you choose not to select a set in the Form Letter Usage Report screen, contacts can be added to a set from within the Form Letter Usage Report.

