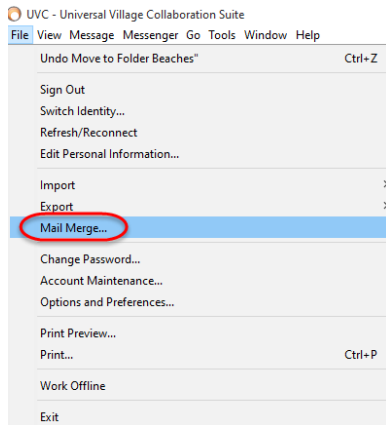![universal village software logo]

How to Create a File which will be used in a Mail Merge

If you want to create a mail merge file which will have one or more of your clients you will need to:

1. Click on **File** and **Mail Merge**.

2. Select the option **Select clients to export** then click on the **Next** button.
   Please note that the option **Apply active search filter** will only work if you have done an **Advance Search** for your contacts. Go straight to **step#7** if you are using the option **Apply active search filter**.
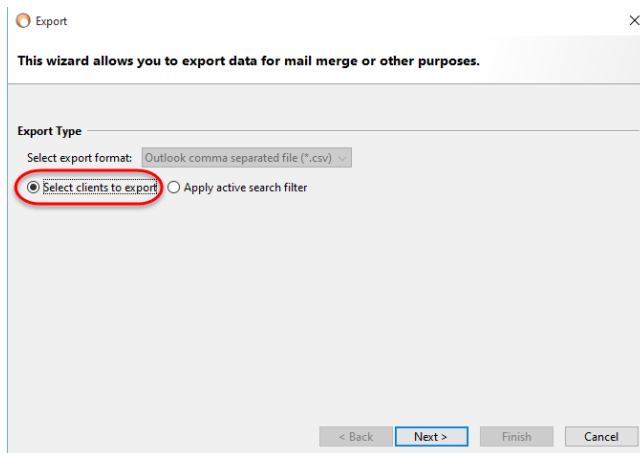

3. On this screen you will need to select the Contact List that the mail merge file will use to export the information to your CSV file.
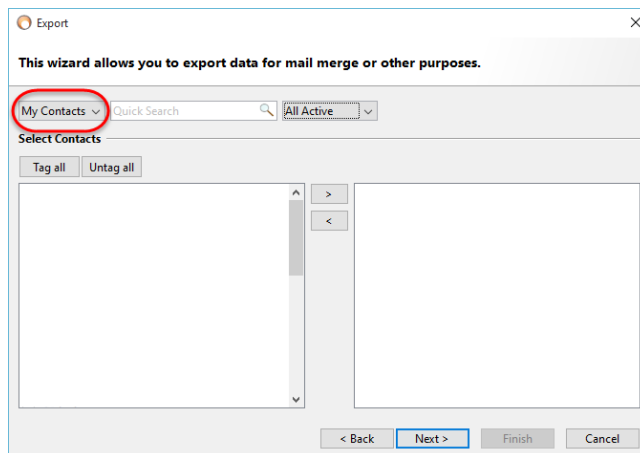
4. Next you will need to choose if you want to create the list for **All Active** clients or **Personal** clients or **Business** clients etc ...

    Below these choices you will see your custom **Groups** if you have created any. You can select a **Group** you have created and the clients will appear on the left side of this pop-up window.
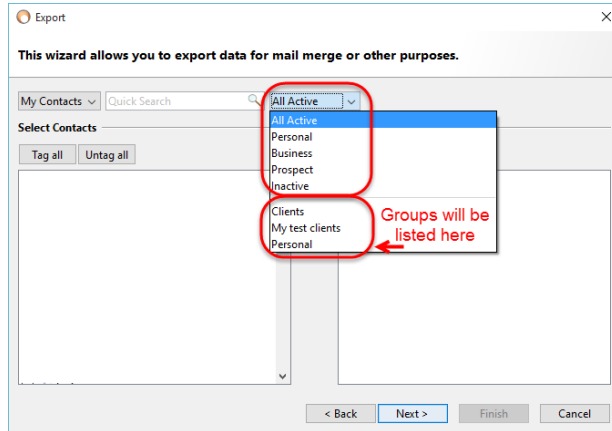

5. In this scenario I will be creating a list for the group My Test Clients.
    I will select them all (or click on the **Tag All** option).
    Then click on the arrow pointing to the right **>**
    This will bring over all clients I have selected on the left to the right (as seen below) of the pop-up window.

    Click on the **Next** button.
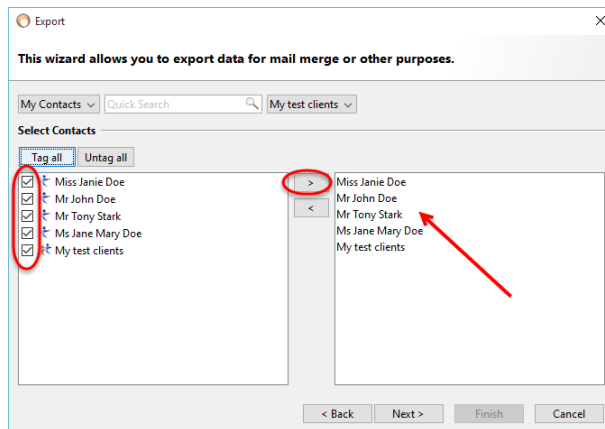
6. Select the fields you want to include in your mail merge file. In my scenario I will select all the **Home Address** fields and **First** and **Last Name**. All other fields not relevant to this mail merger should be <u>unchecked</u>.

7. Make sure to check the option **Include header name** as that will be needed for your mail merger in Microsoft Word. The option **Export custom fields** is not necessary unless you need to export them.
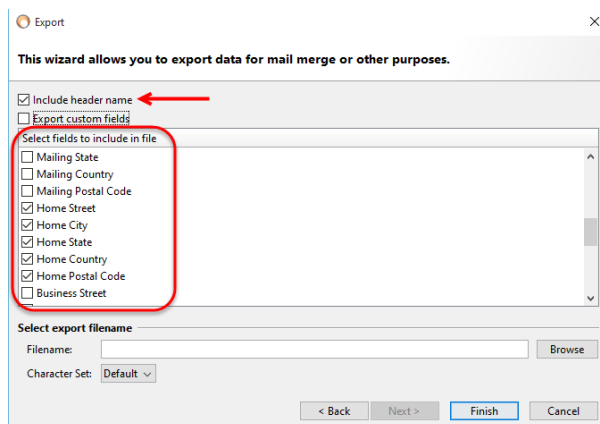
8. Your next step is to click on the **Browser** button to select where you want to save this CSV file.
In this scenario I will choose a folder entitled "labels" located on my desktop.
Then add a **File Name** to the mail merge file.
Click on the **Save** button.
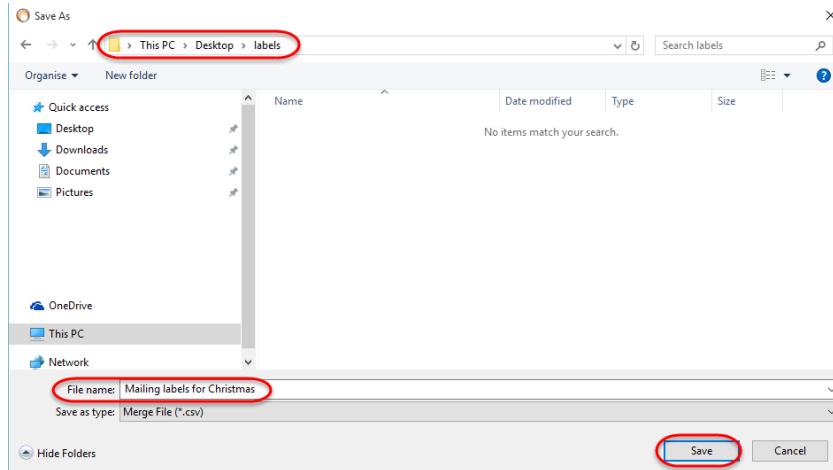
9. Finally click on the **Finish** button to save your file to the location chosen in the step above.
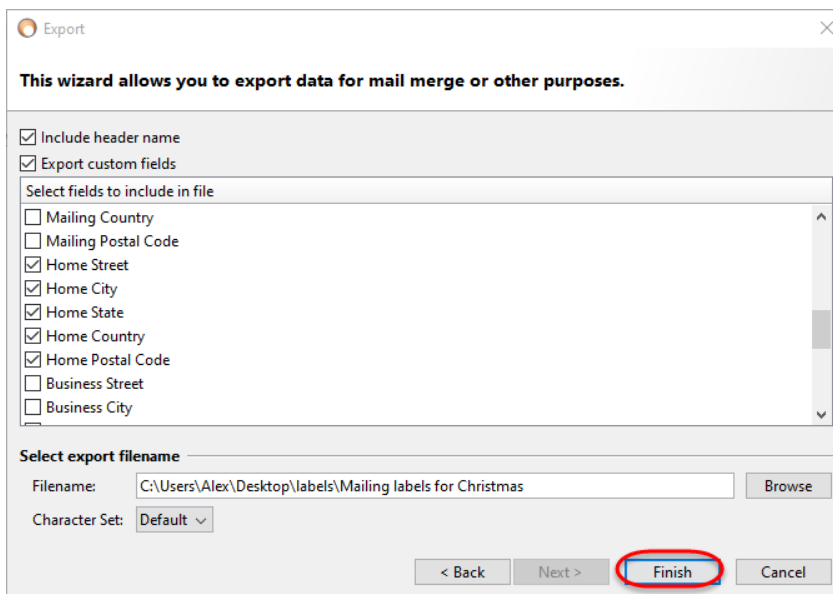
10. You will see this message once it's done:
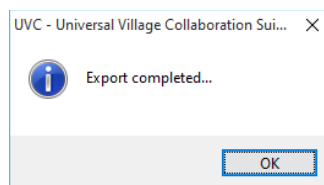
Use the mail merger CSV file to add the information to a template you have created in Word.
The following Microsoft link may help you with your mail merger in Word or use the Mail Merger Wizard which will guide you through this mail merge.

https://support.office.com/en-us/article/Use-mail-merge-to-create-and-print-letters-and-other-documents-f488ed5b-b849-4c11-9cff-932c49474705

Several other websites are available at your disposal on the internet to show you how to create labels using the mail merge file you created in UVC.

11. For example as an alternative to using the templates in Word you can use the **Avery website** to create your own templates (if of course you are using the Avery label paper type). Verify the the make of your labels and see if they have this option available on their website.

12. To print your own labels for Avery type paper go to www.avery.ca
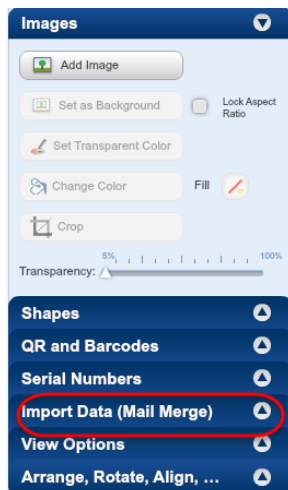   Click on **Templates** and **Design & Print Online** option
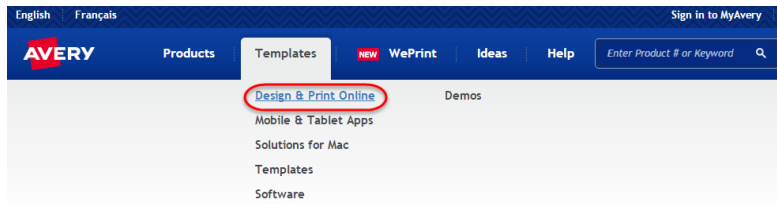
13. Enter you Avery label product number (should be located on the front of the box).
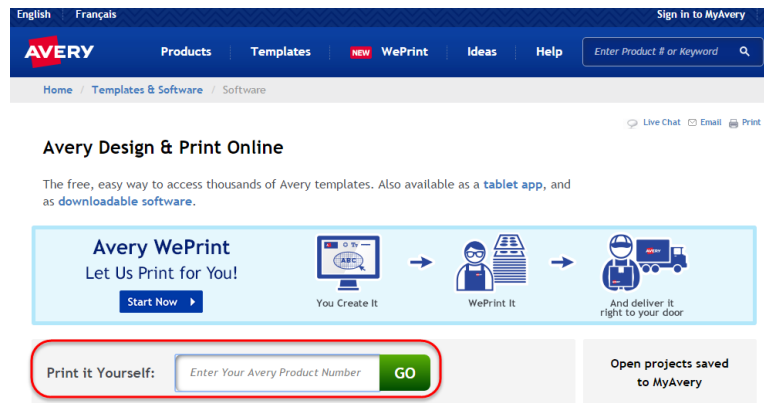
14. If you want select a design form the available choice and then click on the Next button located on the top right.
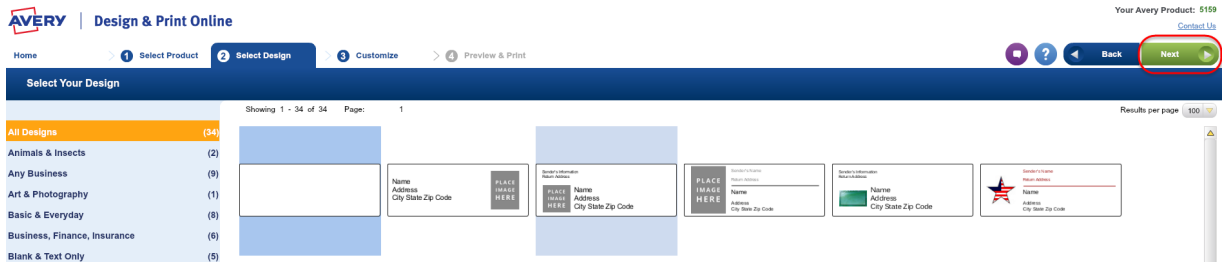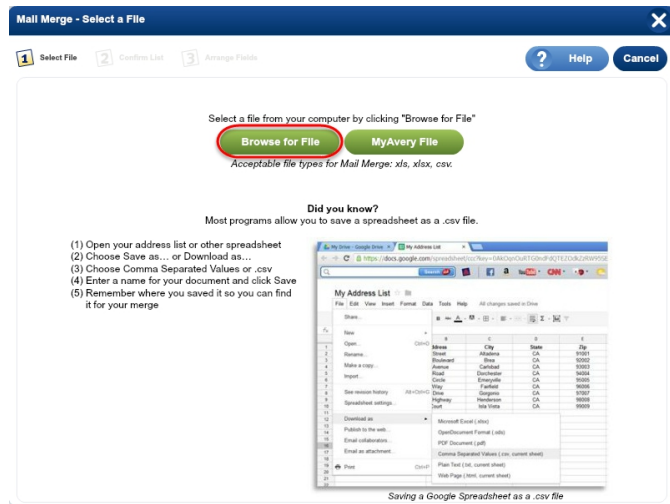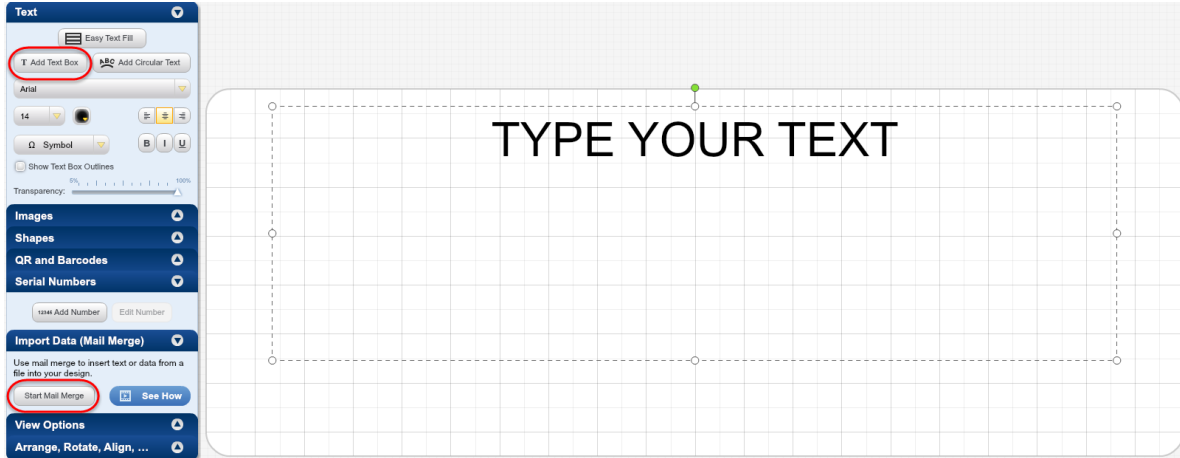

15. On the customize tab select the option Import Data (Mail Merge).

16. We recommend that you watch their **"How to"** video which will explain how to use their mail merge feature. It's very easy.

17. If you are selecting a "blank" label make sure to **Add a Text Box**.
Once done click on "Start Mail Merge" to find and select your CSV file you imported from UVC.

TYPE YOUR TEXT

18. Arrange the "headers" (you selected in **step#6**) the way you want them to appear on the labels
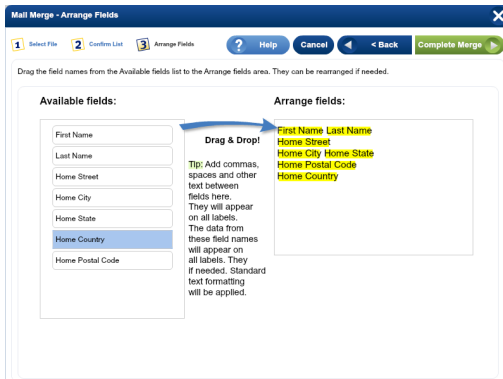
19. You can then move your fields and place the text differently using he available option. You can do it for one or all labels. Once you are done you click on the Preview & Print button.