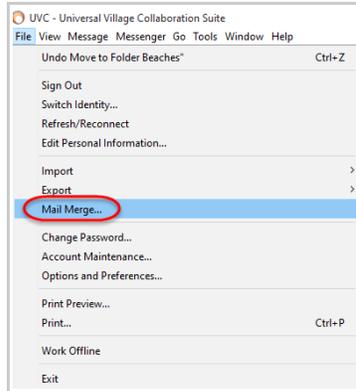


How to Create a CSV file which will be used in a Mail Merge

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

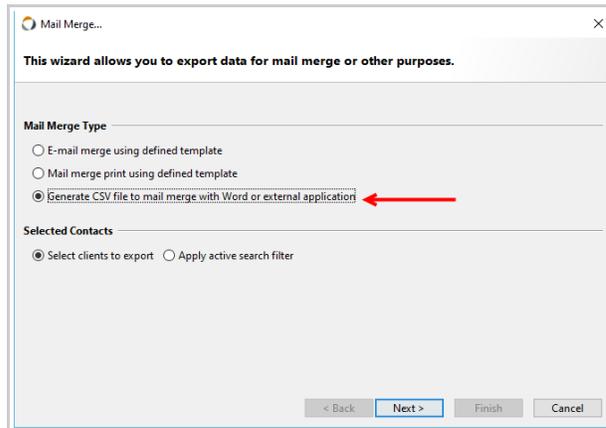
1. Click on **File** and **Mail Merge**.



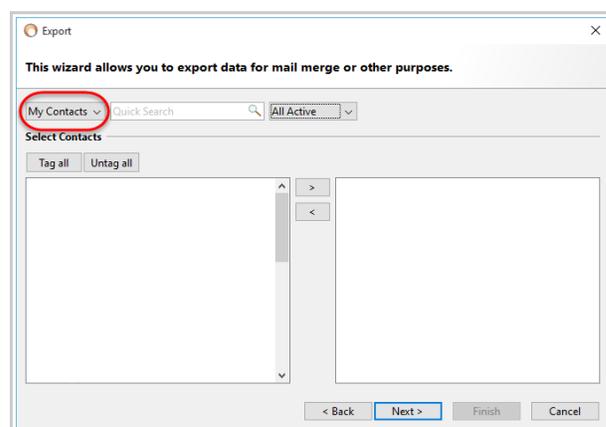
2. Select the option **Generate CSV file to mail merge with Word or external application**.

Select the option **Select clients to export** then click on the **Next** button.

The option **Apply active search filter** will only work if you have done an **Advance Search** for your contacts. Go straight to **step#6** if you are using the option **Apply active search filter**.

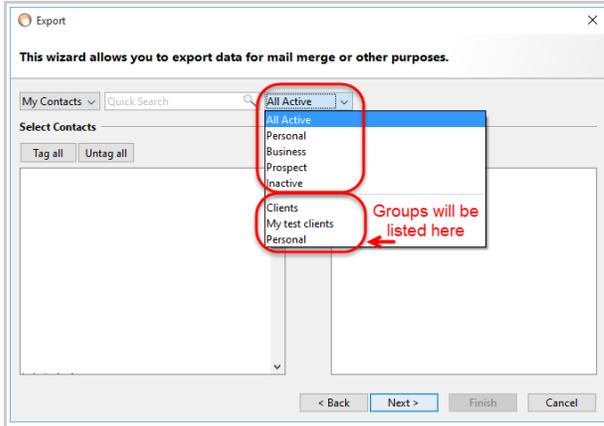


3. On this screen you will need to select the Contact List that the mail merge file will use to export the information to your CSV file.



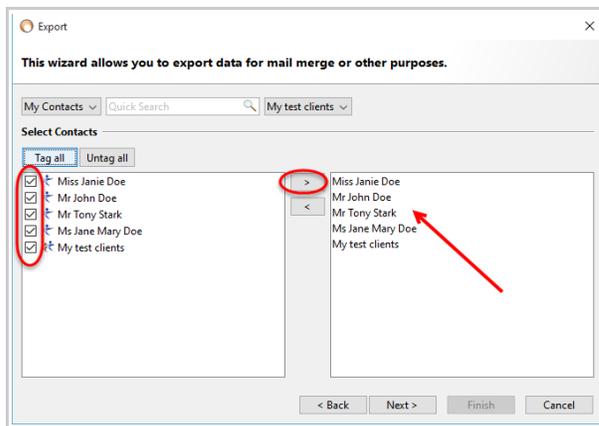
- Next you will need to choose if you want to create the list for **All Active** clients or **Personal** clients or **Business** clients etc ...

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.

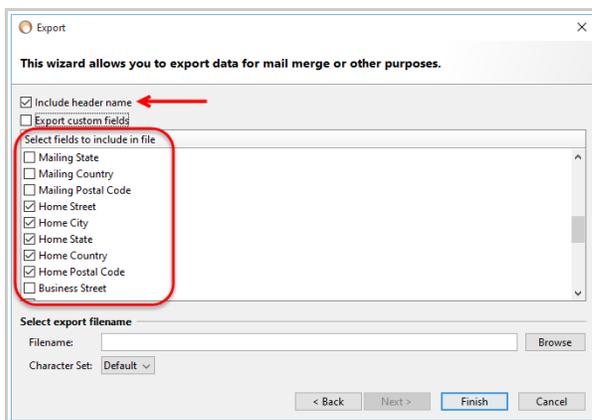


- In this scenario I will be creating a list for the group My Test Clients. I will select them all (or click on the **Tag All** option). Then click on the arrow pointing to the right > This will bring over all clients I have selected on the left to the right (as seen below) of the pop-up window.

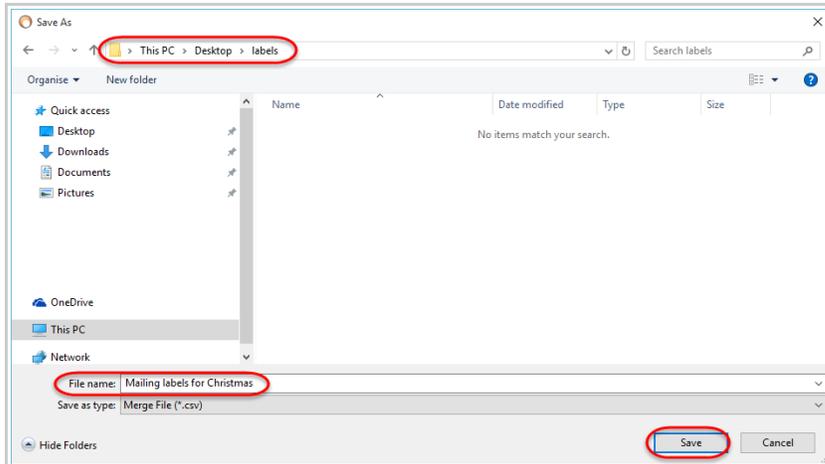
Click on the **Next** button.



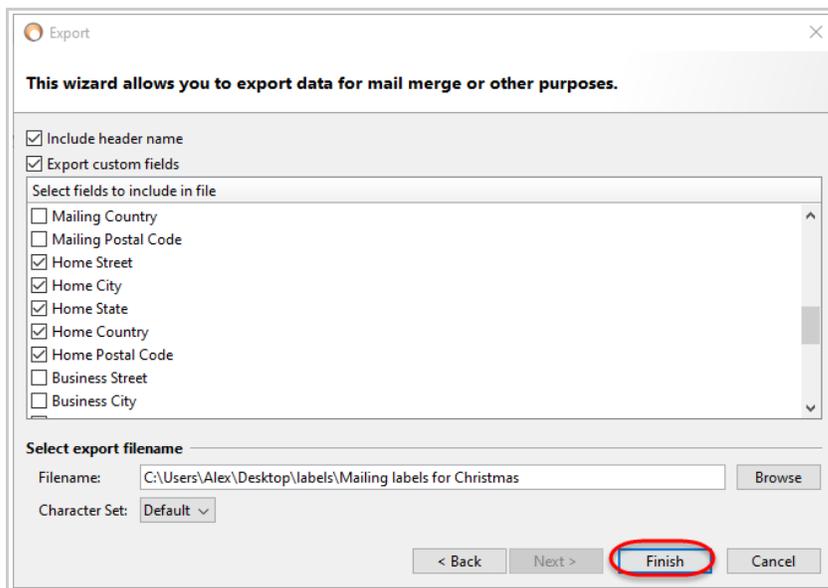
- Select the fields you want to include in your mail merge file. In my scenario I will select all the **Home Address** fields and **First** and **Last Name**. All other fields not relevant to this mail merger should be **unchecked**.
- Make sure to check the option **Include header name** as that will be needed for your mail merger in Microsoft Word. The option **Export custom fields** is not necessary unless you need to export them.



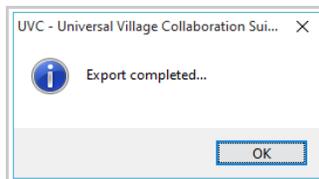
- Your next step is to click on the **Browser** button to select where you want to save this CSV file. In this scenario I will choose a folder entitled "labels" located on my desktop. Then add a **File Name** to the mail merge file. Click on the **Save** button.



- Finally click on the **Finish** button to save your file to the location chosen in the step above.



- 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.

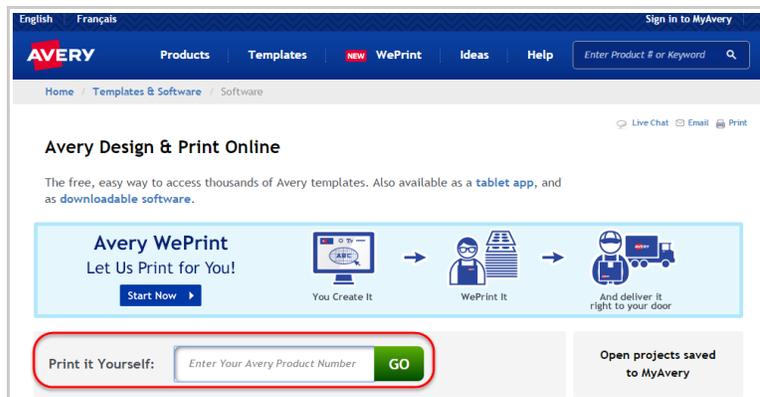
<https://support.office.com/en-us/article/Use-mail-merge-to-create-and-print-letters-and-other-documents-f488ed5b-b849-4c11-9cff-932c49474705>

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.

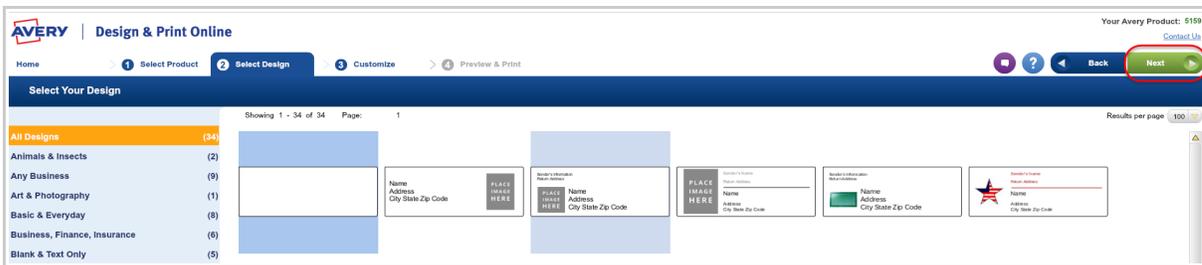
- For example as an alternative to using the templates in Word you can use the **Avery website** to create your own templates (if of course you are using the Avery label paper type). Verify the the make of your labels and see if they have this option available on their website.
- To print your own labels for Avery type paper go to www.avery.ca Click on **Templates** and **Design & Print Online** option



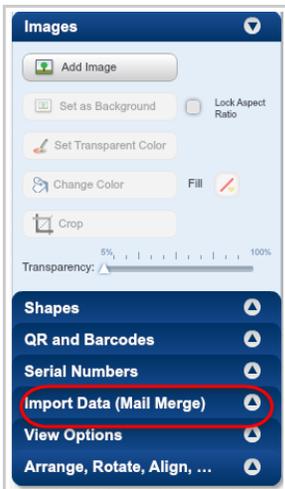
- Enter you Avery label product number (should be located on the front of the box).



- If you want select a design form the available choice and then click on the Next button located on the top right.



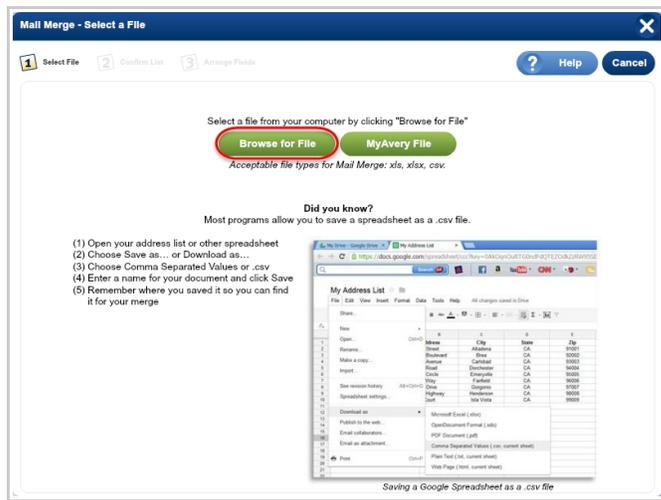
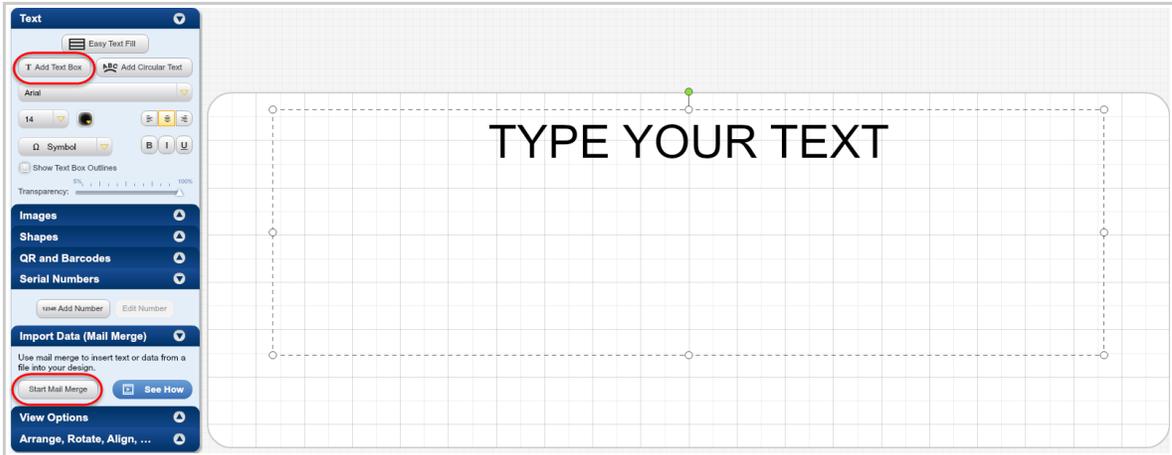
- On the customize tab select the option Import Data (Mail Merge).



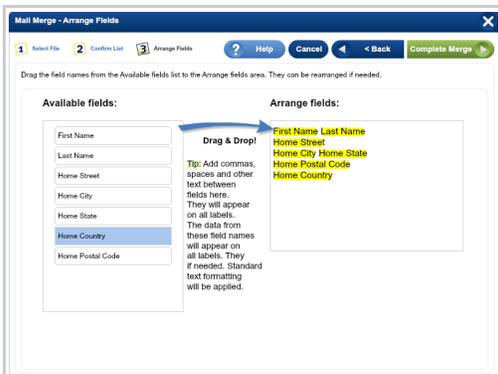
16. We recommend that you watch their “How to” video which will explain how to use their mail merge feature. It’s very easy.



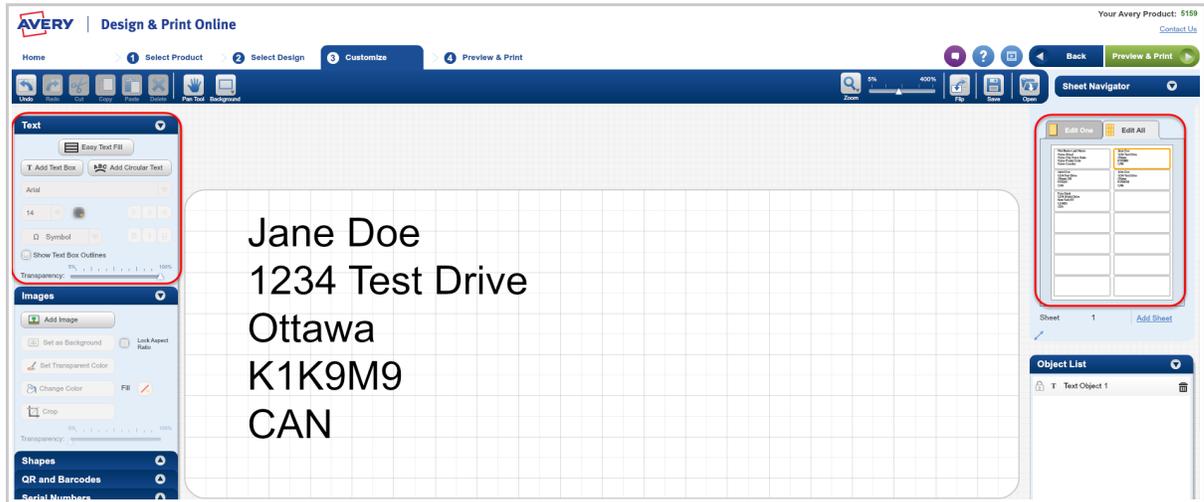
17. If you are selecting a “blank” label make sure to **Add a Text Box**. Once done click on “Start Mail Merge” to find and select your CSV file you imported from UVC.



18. Arrange the “headers” (you selected in **step#6**) the way you want them to appear on the labels



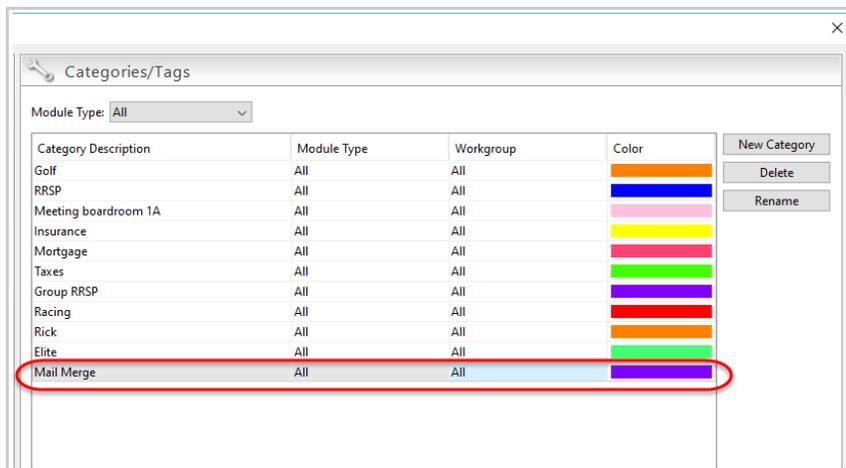
- You can then move your fields and place the text differently using the available option. You can do it for one or all labels. Once you are done you click on the Preview & Print button.



Helpful hints

You might prefer to create 1 single label for both the husband and wife rather than two separate labels. If that is the case use the option below.

- Create a category/tag (in User Manager or your own UVC account) entitled "mail merge" or anything that would indicate to you or anyone that any contact with this tag is used for labels (for Christmas or any event).



- Link this new tag to the "primary" contact of the family that will be added/printed on the label. For example I have a contact named Julie and Martin Tremblay I want to create one single label for both of them. I will associate the **category/tag** that I created in step #1 to Martin Tremblay.



- I will open the **Contact Details** for Martin Tremblay and change the **Display Name** to Mr. and Mrs. Tremblay (I could also type Mr. & Mrs. Martin and Julie Tremblay)

- Once all these 3 steps are done for all your contacts you will search by that specific **category/tag** to filter contacts that have the “mail merge” category/tag. You will see a list of all these contacts. Then follow this guide to create your labels.

Make sure that on **step #7** of this guide you do not select the First and Last name header. Only select the **Display Name** header for the name you want to see on the label. UVC will export the "Display As" name on the CVS file which you can then use on your labels.

If you are using the Avery website you will see this:



Note that steps 1 through 3 only need to be done once.