

## How to create a mail merge template in UVC

This guide will help you create mail merge templates within UVC. When a message is tailored to the reader, it has more resonance. Now you can create personalized templates which can be printed or sent by e-mail to 1 or more contacts.

Please use the following steps to create and send/print a mail merge template:

1. Login to UVC and go to your Inbox Module.

🖉 Create Message 🛛 🦃 Reply 🐧	🧼 Reply All	S Forw	ard 🍅	Move to Folder 🛛 😴 👻 🍏 🗡 🛅 🔫	🕅 👻 🚧 👻 🔍 Advanced Search	🤝 Show My Day
Contacts	🗂 Tasks	Ӓ Cale	ndar	🔪 Notes 🛛 😤 Projects 🛛 🌉 File Store		
My Inbox 👻						
Message Folders	-	= W	0	From	Subject	Received
🗳 Inbox		5		UVC	Welcome!	22-Oct-2
💰 Outbox						
🖾 Sent Items						
<b>N</b> Drafts						
📉 Templates						
Deleted Items						
Search Folders						

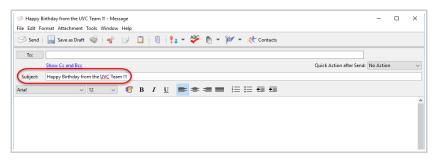
2. Click on the Templates folder in the Inbox Module.

🕗 Create Message 🛛 🥪 Resend 🛛 🤤	Reply All 🛛 🥁 Forv	vard 👘 Move to F	older 💆 - 🌍 🗡 防 - 🕅	🛅 👻 🚧 👻 🔍 Advanced Search	🛛 🤝 Show My Day
🗐 Inbox 🥂 Contacts 👔	🕇 Tasks 🛛 🖄 Caler	ndar [ 🔔 Notes   1	😵 Projects 🛛 🔜 File Store		
My Inbox 🔻					
Message Folders	- 🖻 📂 💡	10 To	Subject	Date 🔻	•
Salahara 🕹 Salahara Sala		ſ	My new signature with banner	Mon, Mar 14	
💪 Outbox					
IS Sent Items					
▲ Drafts					
🔀 Templates					
Deleted Items					
Search Folders					

3. Click on the **Create Message** button. This will enable you to create a new mail merge template.

🖉 Create Message 💢 Resend	Reply A	II 🗳 Fo	orward	📁 Move to Folde	r 🗳 🛪 📴 🕈 🕅 र	🕅 👻 🔍 Advanced Search	🤝 Show My
Inbox New Message.	. 📶 Tasks	🚵 Cal	endar	💧 Notes  😫	Projects 🛛 🛼 File Store		
My Inbox 🔻	_						
Message Folders	4	er 101	? 0	То	Subject	Date 🔻	
😜 Inbox			0		My new signature with banner	Mon, Mar 14	
💰 Outbox							
🖅 Sent Items							
<b>D</b> rafts							
📉 Templates							
Deleted Items							
Search Folders							

4. For the **Subject** add the description of your mail merge template. In my example this is going to be a Birthday mail merge template that I will send to my contacts.



5. Your next step is to add the message on your template. Different mail merge fields are at your disposal which can be integrated to the message.

🥬 Mail Merge Fields	×
	Add
Mail Merge Fields	
Title	^
First Name	
Last Name	
Middle Name	
Nick Name	
Display Name	
Company	
Occupation	
Birthday	
Birth Month	
BirthDay	
Mailing Street	
Mailing City	
Mailing Province	
Mailing Postal Code	~

If for example you want to add Dear John Doe simply type the word Dear and then go to **Tools -> Mail Merger Fields** and add the appropriate fields. In this case it would be **First Name** followed by **Last Name**.

🥬 Нарру В	irthday from the UVC Team !!! - Message		- 🗆 X
File Edit Fo	ormat Attachment Tools Window Help		
🕑 Send	Save as Draft Spell Check	📗 🕕 💱 🖛 🦀 👘 🖛 🊧 🖛 🤾 Contacts	
	Follow Up		
To:	Categories/Tags		
	Show Cc and Bcc Mail Merge Fields		Quick Action after Send: No Action $\checkmark$
Subject:	Happy Birthday from the UVC Team !!!		
Arial	✓ 12 <	B/U ■ = = = = = = = =	
( in a l			
Dear			^
🧐 Нарру В	Birthday from the UVC Team !!! - Message		– 🗆 ×
File Edit Fo	ormat Attachment Tools Window Help		
🕑 Send	📊 Save as Draft  🐳 📑	🗋 🛛 🕅 💱 🖛 🍄 🖿 🕶 🊧 🖛 🥀 Contacts	
To:			
	Show Cc and Bcc	⊘ Mail Merge Fields ×	Quick Action after Send: No Action $\sim$
Subject:	Happy Birthday from the UVC Team !!!	Add	
Arial	v 12 v 😭	Mail Merge Fields	
		Title	^
Dear		First Name	
		Last Name	
		Middle Name Nick Name	
		Display Name	
		Company	
		Occupation	
		Birthday Birth Month	
		BirthDay	
		Mailing Street	
		Mailing City	
		Mailing Province Mailing Postal Code	
		Mailing Postal Code	
		Close	
		Close	
		Close	

*Note:* You can select your field and click on the Add button tor simply double click on the field to add it to the template message. *Don't forget to add spaces in between your mail merge fields!* 

6. If a picture needs to be inserted to the message place the cursor where the image should be located and then click on **Format -> Insert Image** and select the image of your choice.

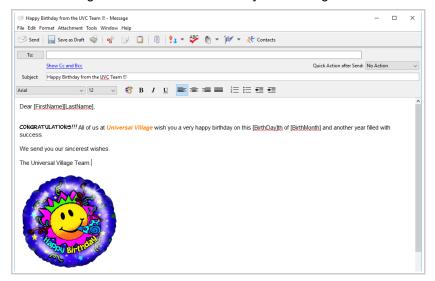
		t Attachment Tools	Window Help			
Sent I	φ, I	Font	😽 🗊 🔲 🕦 💱 = 🖑 🕅 = 🊧 Contacts			
		Insert Image				-
To:	1	Hyperlink				
		Numbered List	Quick Action after Send:	No Action		
Subject		Bulleted List	UVC Team !!!			
Subject		Horizontal Line				
rial	8	Text Color >	, ੴ B <i>I</i> <u>U</u> ■ = = = = 는 는 = =			
	8	Background Color				
Dear [E		- Background Image				
ONGR		Encoding	at Universal Village wish you a very happy birthday on this [BirthDay]th of [BirthMonth] and another year	filled wit	h	
succes		Signature	, , , , , , , , , , , , , , , , , , ,			
		Edit HTML Source				
Ne seria	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	our oncereor we	shes.			

7. If you need to hyperlink your image to a specific URL simply select the image and right click to add the Name and URL

	inthday from the UVC Team III - Message Irmat Attachment Tools Window Help	-	×
🗐 Send	🔚 Save as Draft 🐗 😽 🗊 📋 🔟 🌵 🔧 🗢 🌮 🅅 👻 🊧 Contacts		
To:			
	Show Cc and Bcc Quick Action after Send:	No Action	~
Subject:	Happy Birthday from the LUCC Team !!!		
Arial	v 10 v 6 B I U ≡ = = = = = = = =		
Dear [Firs	stName][LastName],		^
success. We send	ruLATIONS <sup>III</sup> All of us at Universal Village wish you a very happy birthday on this [BirthDay]th of [BirthMonth] and another year you our sincerest wishes. ersal Village Team.		
🧐 Нуре	erlink X		
Name:	UVC		
Address	http://www.universalvillage.net		

8. You can change the font and add color to your message if needed.

OK Cancel



9. Once done click on File -> Save as Template

	Happy Birthday from th Edit Format Attachn		-		-	Ц	×
	Send Send Later	Ctrl+Enter		🔟 🕴 🔹 🦀 🖕 🧗 🗸 🥢 🖉			
	Save as Draft	Ctrl+S					
	Save as Template			Quick Action after Send:	No Action	n	
•	Normal Text Rich Text		VC Team !!!				
	Request Read Receipt						
	Print Preview Print	Ctrl+P			- <b>C</b> II		
	Close		Conversal VIII	age wish you a very happy birthday on this [BirthDay]th of [BirthMonth] and another year	filled wi	m	

10. If you need to send the mail merge template by e-mail you can search for your contacts under the Contacts Module or you can simply select the contacts individually. First go to File -> Mail Merge ...

Undo Move to Folder Afronum G.I.E"	Ctrl+Z
Sign Out	
Switch Identity	
Refresh/Reconnect	
Edit Personal Information	
Import	
Export	
Mail Merge	
Change Password	
Account Maintenance	
Options and Preferences	
Print Preview	
Print	Ctrl+P
Work Offline	
Exit	

## 11. Select the appropriate option:

**E-mail merge using defined template**: this option will allow the user to send a mail merge template by e-mail. Note that this option will automatically e-mail the primary e-mail address of the contact.

Mail merge print using defined template: this option will allow the user to print a mail merge template.

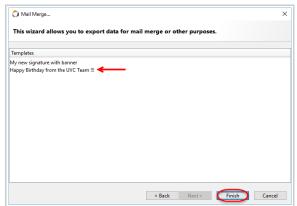
**Generate CSV file to mail merge with Word or external application**: this option will allow the user to create a CSV file using different mail merge fields so they can be integrated to a 3<sup>rd</sup> party application which allows you to create mail merge templates or labels for example. (please ask for *How to Create a CSV file which will be used in a Mail Merge* guide for more information).

Then select if you want to select the contacts individually by selecting the option **Select clients to export** or select the option to use the search performed under the Contacts Module **Apply active search filter**.

Click on the Next button once the appropriate options are selected.

🔿 Mail Merge	×
This wizard allows you to export data for mail merge or other purposes.	
Mail Merge Type	
E-mail merge using defined template	
Mail merge print using defined template	
O Generate CSV file to mail merge with Word or external application	
Selected Contacts	
Select clients to export      Apply active search filter	
< Back Next > Finish	Cancel

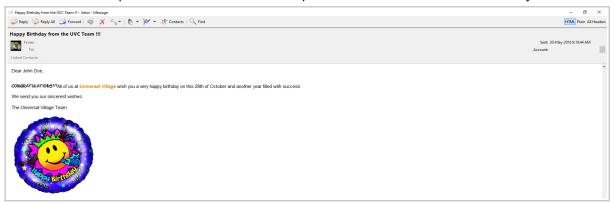
12. Select the mail merge template that needs to be sent via e-mail. Click on the **Next** button.



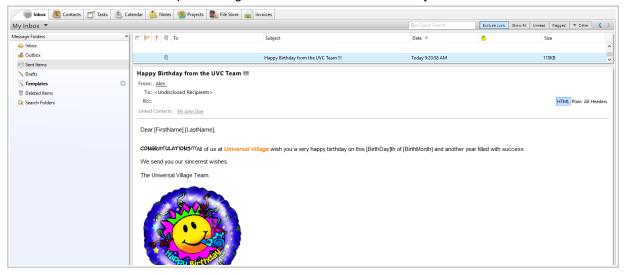
Click on the OK button.



The mail server will process all e-mails and the recipient will receive it in their inbox shortly after.



*Note:* You will notice that only 1 instance of the e-mail will be seen in the **Sent Items** folder. This is by design as it will not duplicate the e-mail you sent out to multiple contacts in your Sent Items folder. This also reduces the amount of space being used to store these e-mails in your UVC account.



13. If you simply want to print your mail merger template then select the option **Mail merge print using** defined template from step #11

This wizard allows you to exp	ort data for mail mer	ge or other pur	poses.	
Mail Merge Type				
O E-mail merge using defined tem	plate			
Mail merge print using defined to	emplate			
O Generate CSV file to mail merge	with Word or external appli	ication		
Selected Contacts				
● Select clients to export ○ Appl	y active search filter			

14. After selecting if you either want to select the clients you want to export or to apply an active search and the mail merge template the **Print** window seen below will appear. Select the desired print options and click on the **OK** button.

e Edit Format Attachment Tools Window Help	) 🤋 - 🍄 🗈 - ᡝ	👻 🤾 Contacts			
Shew Cc and Bcc Subject Happy Birthday from the UVC Team III tachments: Happy Birthday from the UVC Team III al I I I I I I I I I I I I I I I I I I I	Print Output Output Oscreen HTM Messenger Message	L File Adobe PDF File (Unit Message Page Setup Paper Size Lett Orientation Landscape		J) Top: Bottom:	× 0.25 0.5

The default printer properties window will pop up. Select the desired printer options if needed.
 Click on the **OK** button to print the selected mail merge template with the contact field information.

🕌 Print	×
Printer	
Name: KONICA MINOLTA Color	✓ Properties
Status: Ready	
Type: KONICA MINOLTA C364SeriesP	CL
Where:	
Comment:	Print to file
Print range	Copies
	Number of copies: 1
C Pages from: 1 to: 9999	
C Selection	11 22 33 Collate
	OK Cancel