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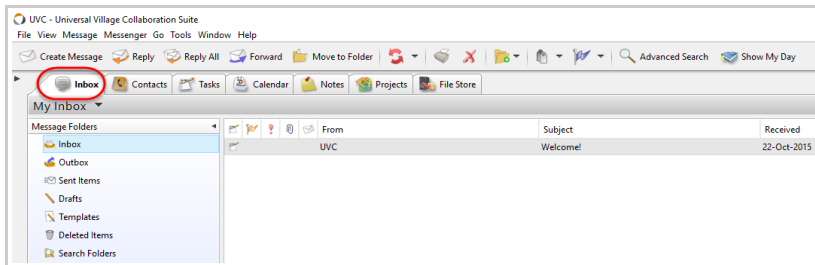
This guide will help you create mail merge templates within UVC. When a message is tailored to the reader, it has more resonance. Now you can create personalized templates which can be printed or sent by e-mail to 1 or more contacts.

Please use the following steps to create and send/print a mail merge template:
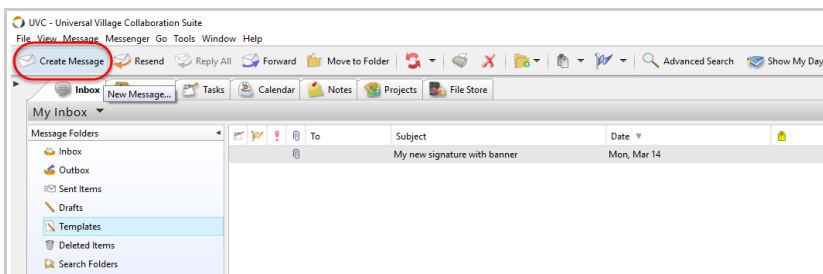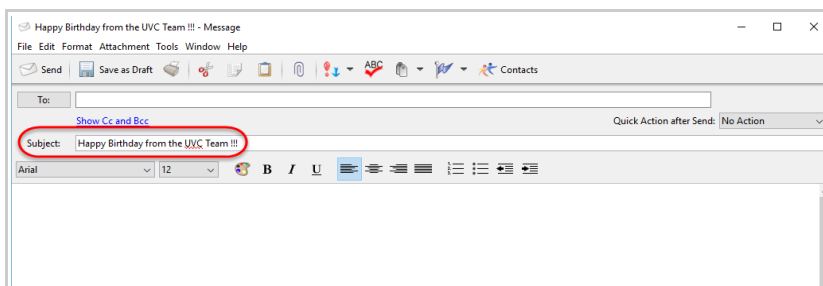
1. Login to UVC and go to your **Inbox Module**.

2. Click on the **Templates** folder in the Inbox Module.
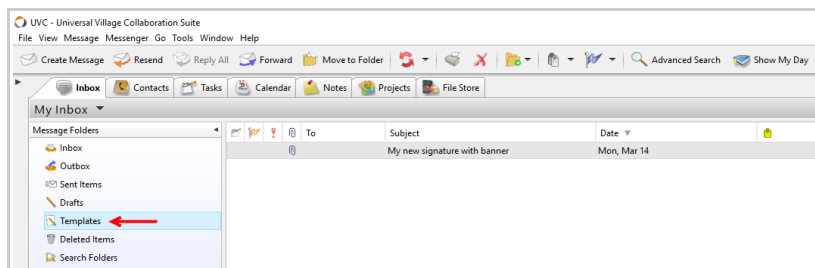
3. Click on the **Create Message** button. This will enable you to create a new mail merge template.


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.
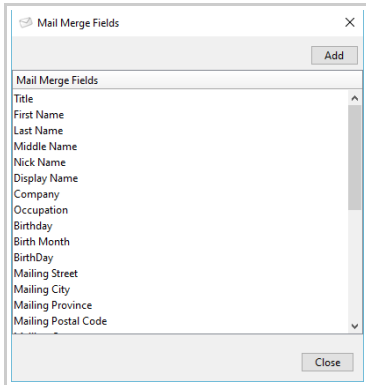

If for example you want to add Dear John Doe simply type the word Dear and then go to **Tools -> Mail Merger Fields** and add the appropriate fields. In this case it would be **First Name** followed by **Last Name**.
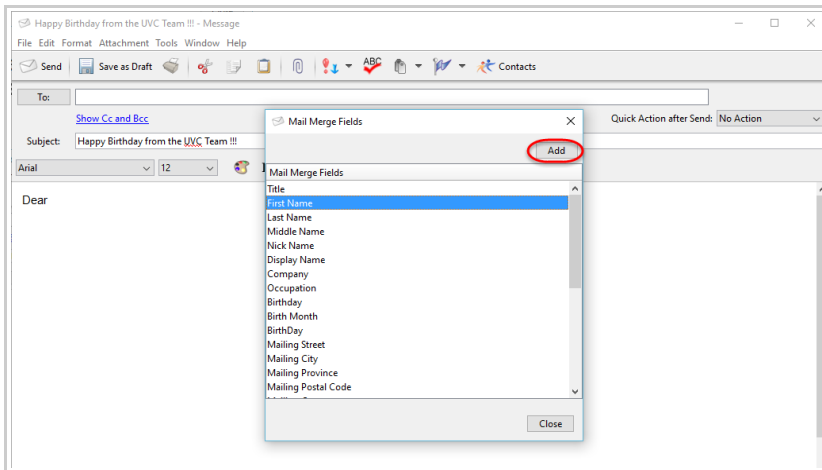

Note: You can select your field and click on the Add button tor simply double click on the field to add it to the template message. *Don't forget to add spaces in between your mail merge fields!*
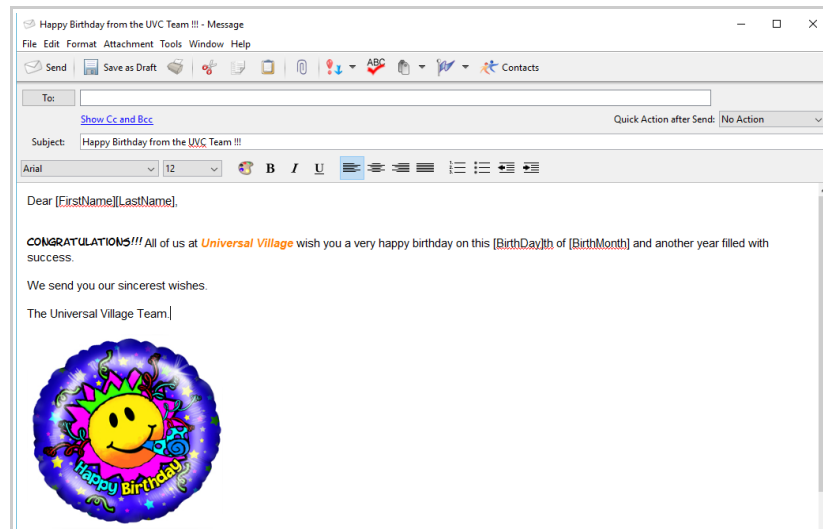
6. If a picture needs to be inserted to the message place the cursor where the image should be located and then click on **Format -> Insert Image** and select the image of your choice.
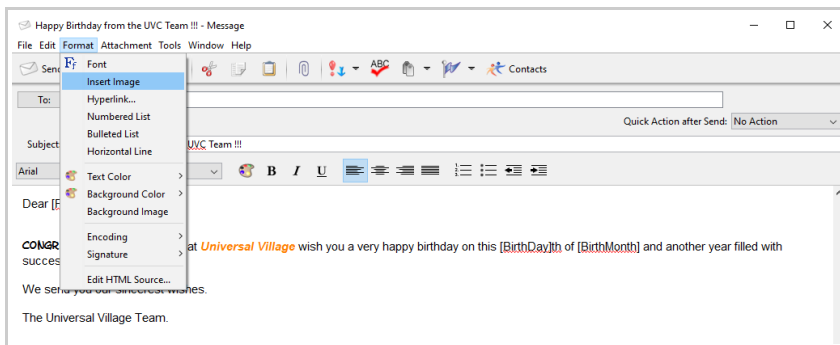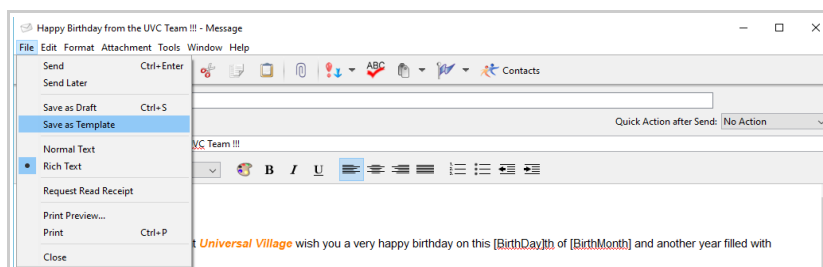
7. If you need to hyperlink your image to a specific URL simply select the image and right click to add the Name and URL
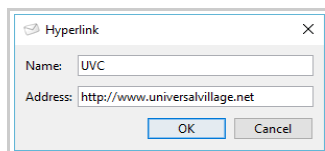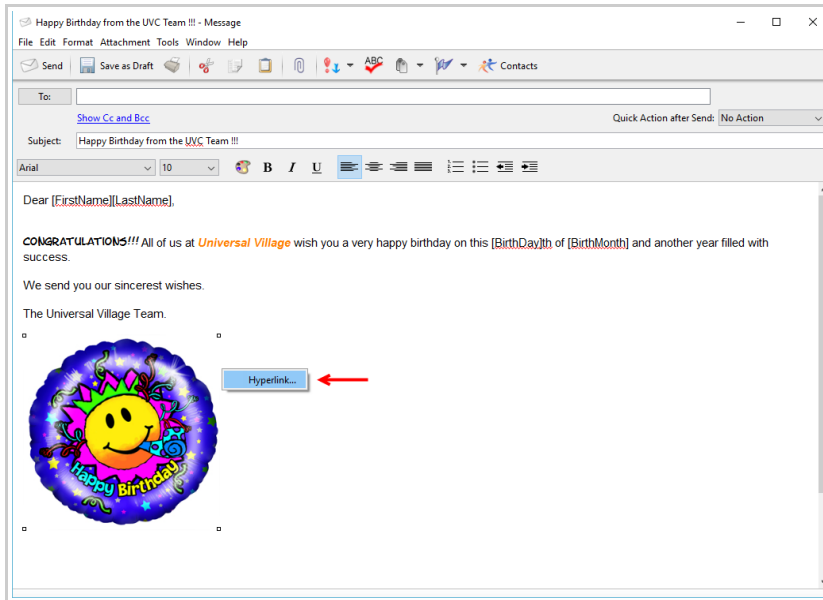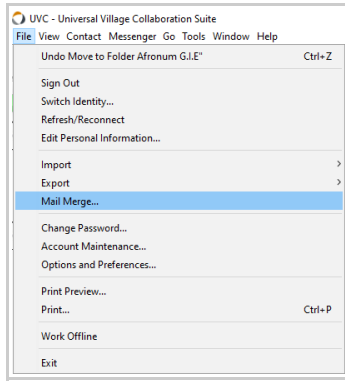

8. You can change the font and add color to your message if needed.

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

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 ...**

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 3rd 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**.
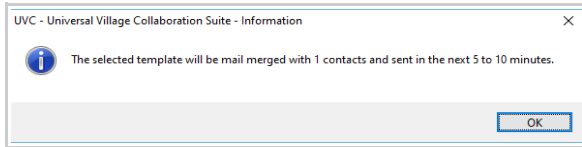
Click on the **Next** button once the appropriate options are selected.
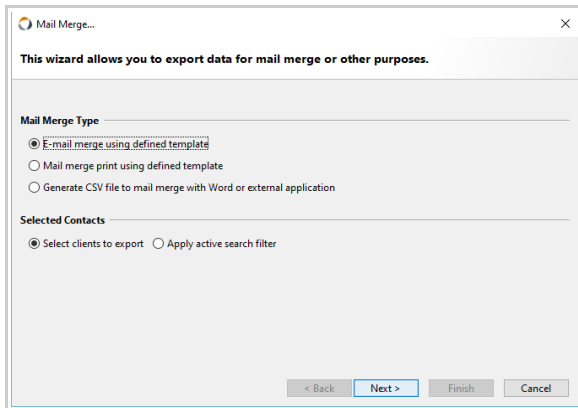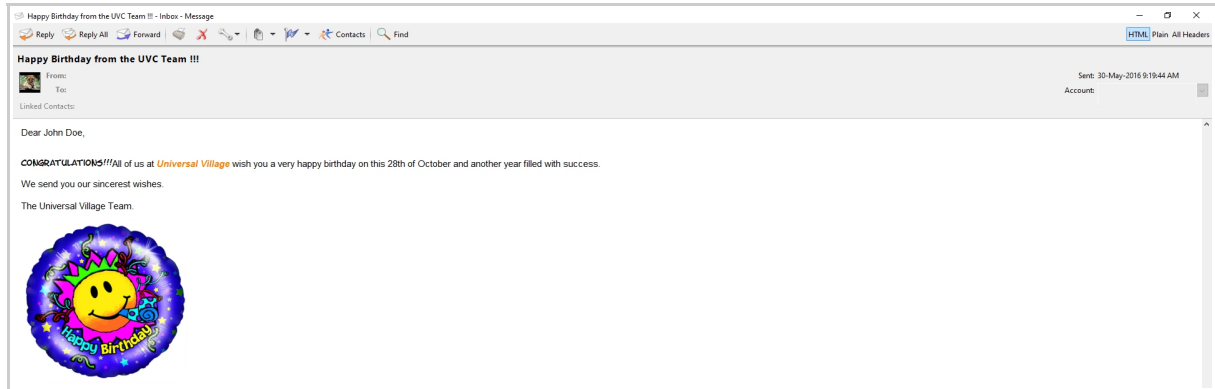

12. Select the mail merge template that needs to be sent via e-mail.
Click on the **Next** button.
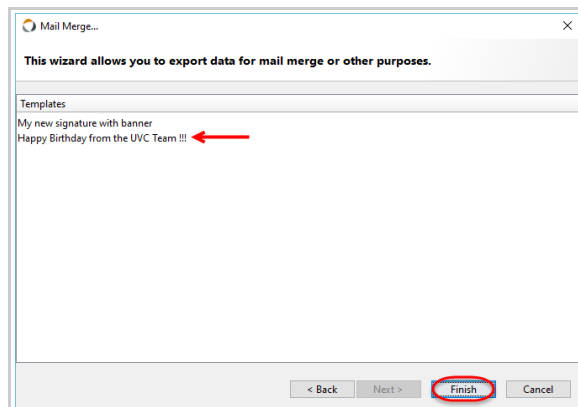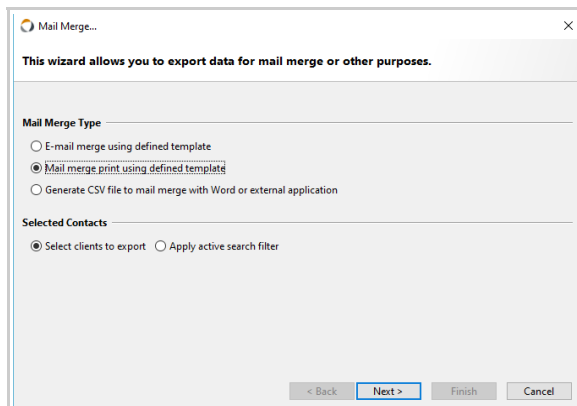
Click on the **OK** button.

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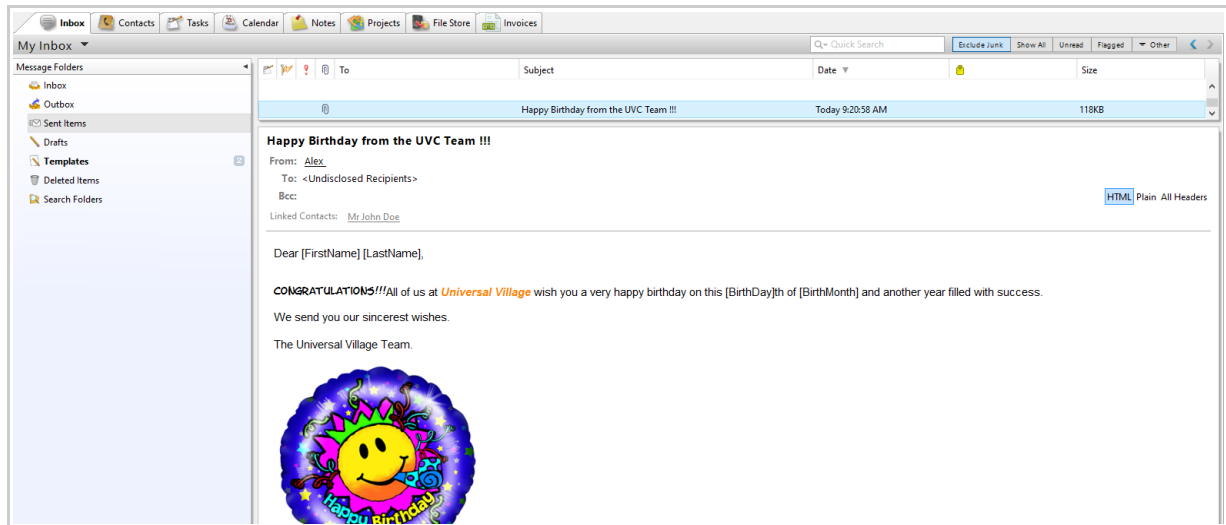
13. If you simply want to print your mail merger template then select the option **Mail merge print using defined template** from step #11

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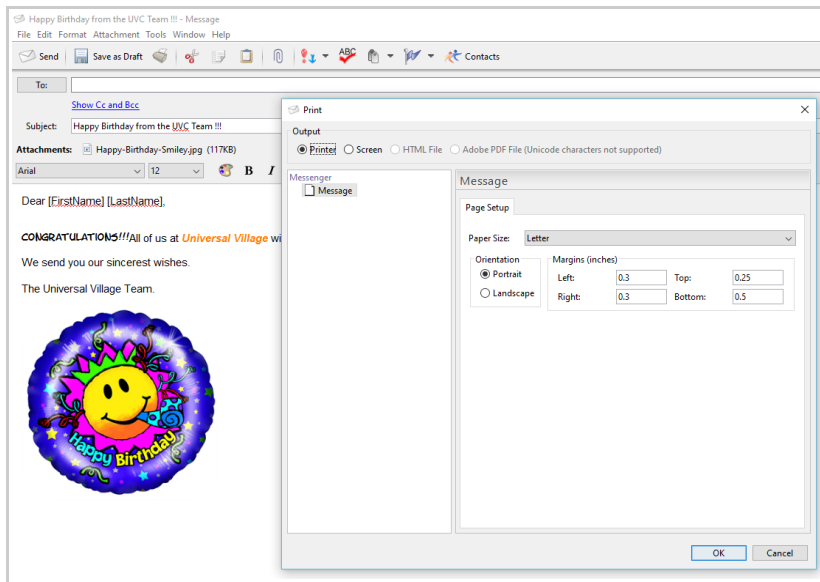
15. The default printer properties window will pop up. Select the desired printer options if needed.
Click on the **OK** button to print the selected mail merge template with the contact field information.