

Mail Merges and Mailing Labels

VSys Webinar – November 2015

Using the mail merge tool allows you to send messages in bulk or individually to your volunteers. It uses the combination of a letter template and filters to create a unique letter for each volunteer who fits the criteria of the filters. There are also tools available to run mailing labels as well as to manage previously merged letters.

Letter Templates

Right-click to copy an existing template or create a new one.

- Properties
 - How is it being sent?
 - Who is it coming from?
- Contents
 - Data fields - bring in personalized information
 - Logo - copy/paste
 - Hint: Have existing copy? Save it as an RTF file in Word. Go to the little folder icon at the top and open it to bring it in.

Mail merge to letters, e-mails

- Tools - Load/Save existing mail merges
- Choose letter template
- Select recipients
 - Using specific criteria
 - By adding them individually or from lists
 - Filtering/ Source criteria
- Merge results/preview
 - Sending electronically (E-mail)
 - Sending to kiosk
 - Printing letters/ mailing labels

Mail merge in other places

- For one person
 - Right click
 - Send this person a letter (using letter template)
 - Send this person a kiosk message
 - Send using Microsoft Outlook
 - Print mailing label

- From within profile editor
- For multiple people

Mailing Labels (Basic with custom filters)

- Settings (type, font, adjustments)
- Filtering/ Source criteria

Bad e-mail handler