QUICK REFERENCE GUIDE

MAIL MERGE

The Practice Engine mail merges are based around the use of information attributes. There are two mail merges that are available – Contact and Client.

USES OF THE MAIL MERGE FEATURE

The mail merge feature can be used for creating the merge data for a mail merge – either by printing labels or creating the excel data file that will be merged into the Word document.

It can also be used as a method of obtaining data and reports from the system based upon the information held in the attributes.

In order for a contact or client to be selected within a mail merge they must have the **Include In Mailing** tick box selected and have the required attribute attached. If the contact has the 'Date of Death' box completed on their details they will not be included in the mail merge.

CONTACT MAIL MERGE

The contact mail merge works with all contact records regardless of whether they are a contact or a client.

> Note: Clients can be distinguished by the client code if the results are exported to Excel.

- Select the office that the mail merge is to be applied to. By default, the selection not specified which will apply the mail merge to all contacts regardless of which office they belong to.
- Select the Primary Staff member for which the mail merge is to be run. This can be left as not specified and the mail merge will run for all contacts.
- Select the attribute type – this is the category that the attribute was attached to when it was set up. The options that are available are: Marketing, Mailing, Engagement, Speciality and Staff.
- Select the required attribute. The list of available attributes is dependent upon the attribute type that has been selected.
- Optional: Select the attribute field that you want to run the mail merge again. This acts as a filter and works in conjunction with any criteria that is put into the Values field.
- Optional: If using the attribute field, enter the criteria to run the mail merge against. This needs to include operators such as =, >, < etc. If the attribute field is a validation category the criteria field will change to show the category list.
- Click onto the **Refresh** button.
- This will refresh the number of contacts that match the criteria.
- The data can then either be printed to labels or exported to Excel.
- If printing to labels, select the label format and click onto the **Labels** button. This will create a report with the mailing information that can be printed directly onto labels.
- If exporting to Excel, click onto the **Export** button. This will create a csv file holding the Cont Index, Salutation, Address, Persons Email, Staff Code, Staff Name, Client Code, Attribute Text, Attribute Number, Attribute Date, Attribute Boolean, Attribute Currency and Attribute Validation. The last 6 fields are the possible information held against the attribute. The Boolean value is either a 1 to represent that the tick box is ticked, or a 0 to indicate that the tick box is unticked.

Tip: It is sometimes easier to ignore the Attribute field and Value fields when defining the mail merge and use the filter facilities within Excel to manipulate the data.

CLIENT MAIL MERGE

The Client mail merge works in a similar fashion to the Contact mail merge. However, it will only apply the mail merge to clients.

- Select the Organisation, Office, Partner and Manager or combination of that the mail merge is to be run against.
- Run the mail merge as described above.