

# Printing & Merging Letters to Contacts (Mail Merge)

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## Donor Management System

After [adding Contacts](#), and segmenting your Contact list using [Advanced Search](#), you can easily generate material for printing (also known as a Mail Merge), such as letters or appeals to be mailed.

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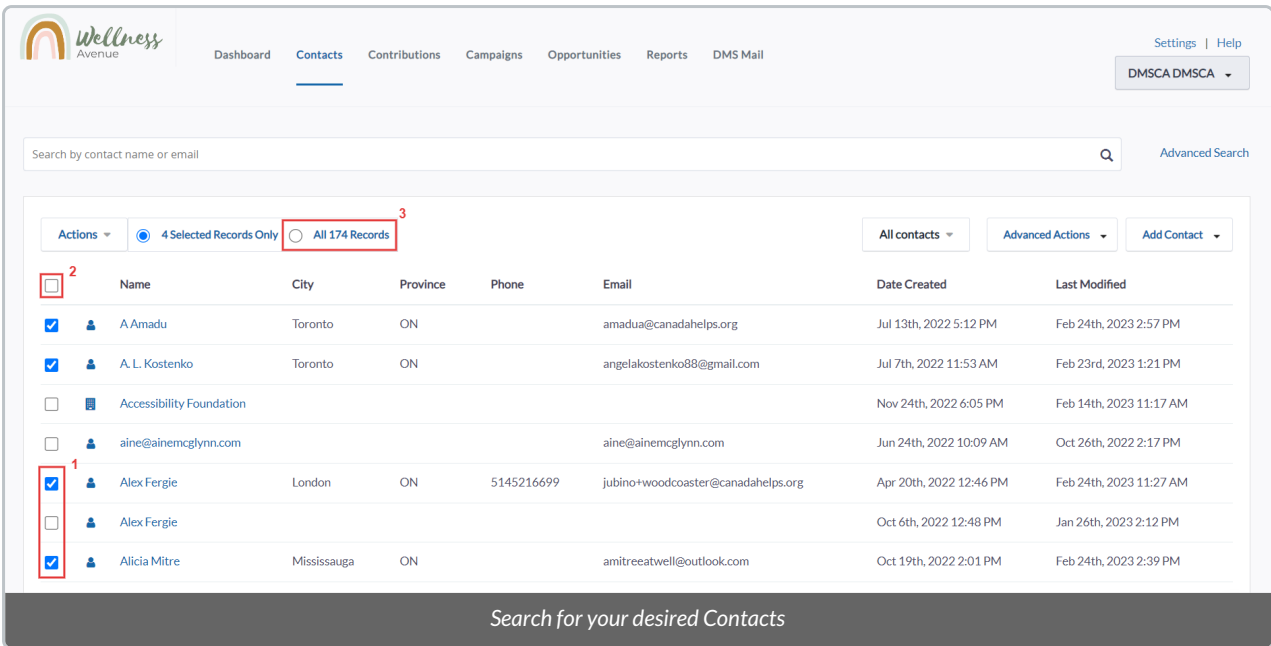
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📺 Prefer to watch a **guided walk-through** of creating Letters for printing? Check out our [Communicating with your Donors Webinar!](#)

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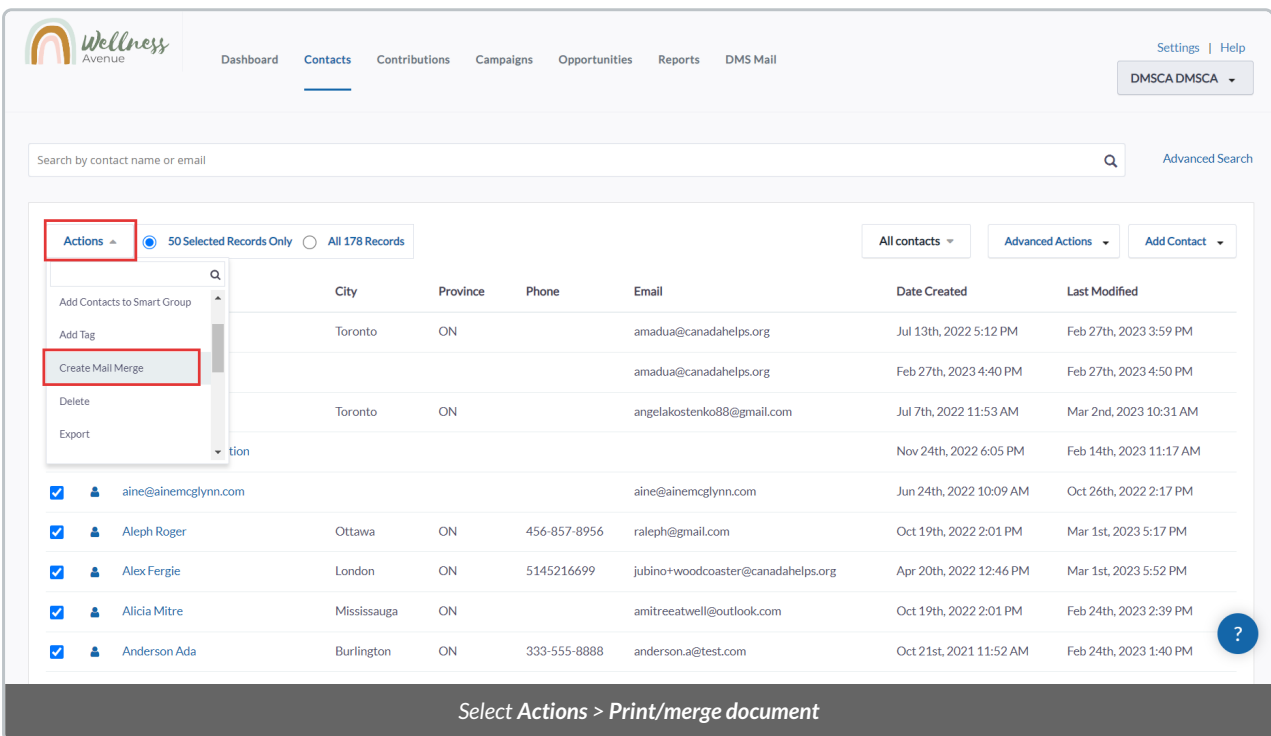
## Generate a Letter for Printing

1. Go to the **Contacts** tab.
2. Search for a specific Contact or select either:
  - (1) The specific **Contacts** you wish to send Single Emails to,
  - (2) Every listed Contact on the page, or
  - (3) All **Contacts** in your DMS.



3. Select the **Actions** menu at the upper-left side of the Contacts list.

4. From the **Actions** menu, either type “merge” or scroll and select **Create Mail Merge**.



5. On the next page, you will see the following information:

Wellness Avenue

Dashboard **Contacts** Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Print/Merge Document

Number of selected contacts: 50  
View Selected Contacts

Use Template: - select - OR Choose File No File Chosen

Activity Subject: [Text Field]

Campaign Group: - select Campaign Group -

Page Format: Default PDF Format

Document Body

Rich Text Editor: Source, Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Link, Unlink, Table, Table of Contents, Styles, Format, Help

Save As New Template

Document Type: Portable Document Format (.pdf)

Download Document Preview Cancel

Print/merge Documents Page

## Main Fields

- **Use Template:** select an [already created Template](#) or create a new one by selecting **Save As New Template** at the bottom of the page or by going to **Settings > Communications > Message Templates**.
- **Choose File:** upload a Word document to compose your letter.
- **Activity Subject:** when Downloading the document, an [Activity](#) will be created and attached to the respective Contacts.
- **Merge Fields:** formerly known as DMS Tokens, they can be used to automatically include information from a Contact in emails (e.g. "Dear {Contact First Name})
- **Campaign Group:** legacy field not in use add the moment. Please ignore it.
- **Page Format: Default PDF Format:** use the default PDF format margins and specifications or select your preferred ones.
- **Save As New Template:** save the created contents of this Single Email as a new Template.

## Document Body

- Compose your letter using this standard formatting tool that uses rich-text (e.g. bold, italics, etc.).

- [Learn more about composing a letter template here](#)

**Document Type:**

- At this moment, you can only download or preview your letter as a ***Portable Document Format (.pdf)***.

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6. Fill out all mandatory fields and compose your letter.

7. You can use an existing [Template](#) or save the contents of your newly composed letter by selecting **Save As New Template**.

8. After all the necessary information is added, select **Preview** or **Download Document** to download a pdf of your new letter.

**Note:** After downloading your new letter(s), an **Activity** will be associated with the respective Contacts.