

Printing & Merging Letters to Contacts (Mail Merge)

Last Modified on 11/28/2024 7:05 pm EST

Donor Management System

Once you've [added your contacts](#) and segmented your list using [Advanced Search](#), you can effortlessly generate materials for printing, such as letters or appeals, through a Mail Merge process for mailing purposes.

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

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.

Wellness Avenue | Dashboard | **Contacts** | Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Search by contact name or email [Q] Advanced Search

Actions ▾ 4 Selected Records Only All 174 Records ³ | All contacts ▾ | Advanced Actions ▾ | Add Contact ▾

<input type="checkbox"/>	Name	City	Province	Phone	Email	Date Created	Last Modified
<input checked="" type="checkbox"/>	A Amadu	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	Feb 24th, 2023 2:57 PM
<input checked="" type="checkbox"/>	A. L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	Feb 23rd, 2023 1:21 PM
<input type="checkbox"/>	Accessibility Foundation					Nov 24th, 2022 6:05 PM	Feb 14th, 2023 11:17 AM
<input type="checkbox"/>	aine@ainemcglynn.com				aine@ainemcglynn.com	Jun 24th, 2022 10:09 AM	Oct 26th, 2022 2:17 PM
<input checked="" type="checkbox"/>	Alex Fergie	London	ON	5145216699	jubino+woodcoaster@canadahelps.org	Apr 20th, 2022 12:46 PM	Feb 24th, 2023 11:27 AM
<input type="checkbox"/>	Alex Fergie					Oct 6th, 2022 12:48 PM	Jan 26th, 2023 2:12 PM
<input checked="" type="checkbox"/>	Alicia Mitre	Mississauga	ON		amitreetatwell@outlook.com	Oct 19th, 2022 2:01 PM	Feb 24th, 2023 2:39 PM

Search for your desired Contacts

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**.

Wellness Avenue | Dashboard | **Contacts** | Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Search by contact name or email [Q] Advanced Search

Actions ▾ 50 Selected Records Only All 178 Records | All contacts ▾ | Advanced Actions ▾ | Add Contact ▾

- Add Contacts to Smart Group
- Add Tag
- Create Mail Merge**
- Delete
- Export

<input checked="" type="checkbox"/>	Name	City	Province	Phone	Email	Date Created	Last Modified
<input checked="" type="checkbox"/>	A Amadu	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	Feb 27th, 2023 3:59 PM
<input checked="" type="checkbox"/>	A. L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	Mar 2nd, 2023 10:31 AM
<input type="checkbox"/>	Accessibility Foundation					Nov 24th, 2022 6:05 PM	Feb 14th, 2023 11:17 AM
<input type="checkbox"/>	aine@ainemcglynn.com				aine@ainemcglynn.com	Jun 24th, 2022 10:09 AM	Oct 26th, 2022 2:17 PM
<input checked="" type="checkbox"/>	Aleph Roger	Ottawa	ON	456-857-8956	raleph@gmail.com	Oct 19th, 2022 2:01 PM	Mar 1st, 2023 5:17 PM
<input checked="" type="checkbox"/>	Alex Fergie	London	ON	5145216699	jubino+woodcoaster@canadahelps.org	Apr 20th, 2022 12:46 PM	Mar 1st, 2023 5:52 PM
<input checked="" type="checkbox"/>	Alicia Mitre	Mississauga	ON		amitreetatwell@outlook.com	Oct 19th, 2022 2:01 PM	Feb 24th, 2023 2:39 PM
<input checked="" type="checkbox"/>	Anderson Ada	Burlington	ON	333-555-8888	anderson.a@test.com	Oct 21st, 2021 11:52 AM	Feb 24th, 2023 1:40 PM

Select Actions > Print/merge document

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

Print/Merge Document

Number of selected contacts: 50
View Selected Contacts

Use Template: OR No File Chosen

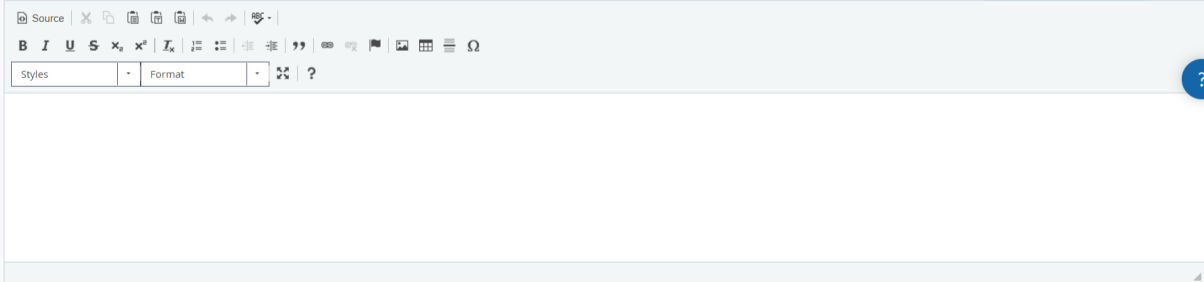
Activity Subject:

Campaign Group:

Page Format: Default PDF Format

Document Body

</> Merge Fields



Save As New Template

Document Type:

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)**.

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.