Mail merge
VSys Webinar – October 2014

The mail merge tool helps you keep in touch with your volunteers. We'll take a quick look at how letter templates allow you to customize the message, but we'll focus on how the mail merge tool will create a letter for each applicable person. Learn how to merge letters for printing, e-mails, kiosk messages and mailing labels to communicate most effectively with your volunteers.

Letter templates:

Letter templates are the documents which VSys merges together with information about your volunteers to produce letters. They are identical in concept to the mail merge documents in Microsoft Word. Write your letter and include data fields which are then replaced with each person's data to create the individual letters.

Creating a Letter Template
- Add letter template – Creates a new, blank template.
- Load built-in templates – Brings up a list of the sample templates which are built into VSys One. These can act as a starting point for your own templates, and you can hide those which are not useful to you.
- Copy – On the right-click menu, copies an existing letter template.

Letter template editor
- Insert fields – Data fields bring the information in VSys into your letter.
- Sub-letters - Sub-letters are like detail reports: for each matching detail record they'll be included once. These are most commonly used to detail a person's assignments, upcoming trainings, or account records.
- Attachments – Define your attachments in the E-mail attachments tool from the E-mails and SMS messages panel.
  Note: Once an attachment is set up here, VSys no longer uses the file on your computer. Instead it works from the copy that it saved to its database. If you've made a change to the disk file and want VSys to use the updated one, edit the attachment and click the Replace link to update it.

Mail merge:

Using the mail merge tool allows you to send letters 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.

Mail merge to letters, e-mails
- Tools
  - Load/Save
- Choose letter template
- Select recipients

- o Using specific criteria
- o By adding them individually or from lists
- o Filtering/ Source criteria
- Merge results/preview
  - o Sending electronically (E-mail)
  - o Sending to kiosk
  - o Printing letters/mailing labels
  - o Right click options