Mail Merge in Counter Intelligence Office

This is the procedure to perform a customer mail merge using Microsoft Excel and Word.

Exporting the Data From Counter Intelligence

1. From Counter Intelligence Office, select **Reporting / Customer / Customer Marketing Report**

2. Make your selection based on the criteria you require ie. Branch or Amount Spent
    Also optional customer marketing fields such as date of birth, favourite colour etc.

3. When prompted for the print option, select to print to an **Excel** spreadsheet
    Save it with a filename of (for example) **CUSTOMER LIST.xls**
    Once the export is complete, close out of the reporting screen.

Verifying / Modifying the Data in Excel

4. Start Microsoft Excel, click on **File** / **Open**

5. Browse to the **C:\ Program Files \ Counter Intelligence Office \ Reports** folder.

6. You should be able to see the file you named earlier   **CUSTOMER LIST.xls**

7. As the first 4 rows contain report heading information, these lines can be deleted.
    To do this, click on the left of each row to highlight it, then click **Edit** and select **Delete**.
    This should remove the entire row. Repeat this process for the remaining 3 rows.

8. Modify any data in the Excel spreadsheet if necessary such as Address lines

9. Once all modification is complete, click on **File** / **Save**

Merging the Data into Word

10. Start Microsoft **Word**, click on **Tools** and select **Mail Merge**

11. When the Mail Merge window appears, click on **Create** and select **Mailing Labels**.
    If you are printing letters instead, select **Form Letters** instead of **Mailing Labels**
    It will give you an option to use the active window, click on **Yes**.

12. Click on **Get Data** and select **Open Data Source**.

13. This will bring up the Open File window.
    Change to the **C:\Program Files \ Counter Intelligence Office \ Reports** folder first.
    Change the **Files of Type** option by clicking on the down arrow and select **MS Excel**.

14. You should be able to see the file **CUSTOMER LIST.xls**. Highlight and click **OK** to select it.

15. It will then display another window. Click on **OK** to select **Entire Spreadsheet**.

16. It will then prompt to setup your document and allow you to specify the type of label you are printing to.

17. You can then start inserting the merge fields (the fields you want on your label)
    i.e Name, Address1, Address2, Address3.

18. Click **OK**. Then click on **Merge** to merge the customer addresses to your labels.

Note.   The procedure for printing Form Letters is similar, except at step **10** select **Form Letters** instead of **Labels**.