Customer Information Mail Merge

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Q. I would like to send out a personalized letter to my customers. How can I merge the customer information in Agvance to this document in Word?

A. To merge customer information in Agvance to a Word document, follow these steps:

1. Preview the Customer Label report at *Hub / Reports / Customer Reports / Labels* or *Accounting Reports / Accounts Receivable / Customer / Labels*, including the specific addresses you want printed on the letter.

2. Select the *Export* feature on the *Preview* screen. This is the white envelope with a red down arrow at the top of the screen.

3. Select *Excel* as the *Format*.

4. The *Destination* should be *Disk File*. This will save the file to your hard drive.

5. Open this file in Excel. At this point, you will need to label the columns on the spreadsheet as *Name*, *Address*, *City*, *State*, and *Zip*. Then you should drag and drop or paste the appropriate information into those columns, so that starting from the left side of the row you read across the name, address and city/state/zip.

6. After you have made these changes, save this information in Excel.

7. In Word, you will need to open the letter that you want to send.

8. Choose *Tools / Mail Merge* and select the Excel document that you just saved as the *Data Source*. At this point, you may have to define each field for the *Name*, *Address*, *City*, *State*, and *Zip* in your Word document.

9. After you have defined the fields and chosen *Merge*, the customer names and addresses should appear on the letters.