



## Creating Envelopes

Use DonorSnap's reports to build an envelope template **Using Mail Merge in Microsoft Word**, which can then be uploaded and stored in to DonorSnap for future use.

1. Download an Excel file from DonorSnap
  - a. DataMiner Platinum: click the **Export to Excel** button on the **Review Data** tab of your report
  - b. Acknowledgements: **Processing > Documents > Acknowledgement Letters**. Click the **Excel** button for the batch you want to export (does not matter which actual batch because you only need the headers in the Excel file, not the actual donation information)
2. Open Microsoft Word. Go to **Mailings**. Click **Start Mail Merge**, and choose **Envelopes**.
3. Select your recipients (the Excel file you've downloaded out of DonorSnap).
4. Insert merge fields in to your Envelope template.
  - a. We recommend using the **LabelLines**, which will "squish" the lines together, removing any blank fields. For example if your mail merge is Company > then first/last name, and if some of your individuals do not have a Company name, that field will remain BLANK. By using the **LabelLines** in your mail merge, these extraneous spaces will be removed.
5. Save that **merged** file on your computer somewhere.
6. Upload the merged file in to DonorSnap under **Processing > Documents > Upload/Download**
  - a. **Acknowledgement**: will upload it to the Acknowledgement system, to generate envelopes for those pending donations receiving their Thank you letters.
  - b. **DataMinerBatch**: will upload it to the DMP Batch system, to generate envelopes with any DataMiner report you create in the future.



## Who are you creating envelopes for?

**Acknowledgements:** Pending donations receiving a Thank You letter

Create an Envelope template from **Microsoft Word** (same processing as creating the Thank You letters) and upload to the Acknowledgement System.

### **Processing > Documents > Acknowledgement Letters**

Choose the batch to generate envelopes for. Select the Envelope template you have uploaded. Click the **Generate** button.

**DataMiner Platinum** batch that **you** created of WHO to build envelopes for

In your DataMiner Platinum report, click the Review Data tab. **Export to Excel** button.

**Manually** merge this report with an Envelope template you create in **Microsoft Word**

OR

Use an Envelope mail-merged template you have previously created and uploaded to:

### **Processing > Documents > DataMiner Batch Letters**

To create the envelope template, you will go through the same process as above: downloading an Excel file from DataMiner Platinum, manually merging it with an Envelope template in Microsoft Word. Now upload that template to the Batch Letter system where it will be stored for future use.