Generate Mail Merge

> The Generate Mail Merge tool allows administrators to export user mailing addresses from the system into a downloadable file format. Its primary purpose is to seamlessly provide data for Microsoft Word's Mail Merge feature, enabling the mass production of physical letters and communications. This article is intended for OperationsCommander (OPSCOM) administrators responsible for managing user communications and mass mailings.

Setup and Configuration

This tool is a standard administrative feature and does not require any specific system configuration to function.

Admin Side: Administrators do not need to configure any system settings. However, they must have access to Microsoft Word (or a compatible word processor) on their local workstation to utilize the exported data.

Using this Feature

Administrators can use the following instructions to generate and download the necessary CSV file for their physical mail merge.

Generating the CSV File for Export

1. Hover over **User Management** and click **Generate Mail Merge**.

2. Wait for the system to generate the mailing list based on your total user records.
3. Click the **CSV** button to export and download the file to your local computer.

> In databases with an exceptionally large volume of user records, this export tool may not function as expected or could time out. If you encounter issues exporting the full list, please contact OPSCOM Support for assistance.

Composing and Initiating the Mail Merge

1. Open Microsoft Word on your local computer after successfully downloading the CSV file.
2. Import the downloaded CSV file into your document using the software's native mail merge tools.

> Depending on your specific version of Microsoft Word, the exact steps for importing a data source may differ. Please refer to the official Microsoft Mail Merge documentation for detailed, software-specific instructions on completing the merge.

Best Practices and Considerations

- **Understand export limitations: Be aware that this tool currently exports all user records from your database.** Granular filtering options (such as exporting only specific user types or active accounts) are not currently available within the tool itself. You must filter the data

manually in Excel or Word after the export is complete.

- **Audit data before sending: Always review the exported CSV file for accuracy and missing data before proceeding with the physical print run.** This simple check prevents wasted materials and ensures your communications reach valid mailing addresses.

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