



# Creating Envelope Company Export



In order to be included in an envelope mailing a person has to meet the following criteria:

- Have an **envelope number** on their **Donor** record.
- Have the option **Cancel Envelopes** set to **No** on their **Donor** record.
- Have a physical Address. (Edit addresses using the Add/Edit Family Tool.)
- Have their **Contact status** set to **Active** on their **Contact** record. (Inactives with **Cancel Envelopes** set to **No** can be found and fixed here: <https://my.eriescd.org/mp/299-365>.)

## Ensure envelope export doesn't include deceased people:

1. Click **Contacts** and choose the view **Fix Households w/ Deceased Contact**.
2. Run the **Deceased Person Tool** for everyone on this list.

**Review envelope users:** If they aren't being used, you may wish to stop mailing some envelopes.

1. Click **Contributions** and click **Donors**.
2. Change the view to **Env File–No giving 18 mo.** (Shows those who haven't given in 18 months.)
3. To stop envelopes for **everyone on the list**, contact Kathy.  
To stop envelopes for **a few people on the list**,
  - a. click on their name in the list.
  - b. click the **Edit** button and change **Cancel Envelopes** to Yes.
  - c. Click **Save** and close the record.
  - d. Repeat.

## Instructions for exporting the envelope file

1. Click **Contributions** and choose **Donors**.
2. Choose the View **Env File-Will be included** (shortcut <https://my.eriescd.org/mp/299-640>)
3. Click the **Reports** button and choose **Envelope File**.
4. Set up the report using the options provided:

The screenshot shows a web interface for configuring a report. It includes the following fields and options:

- Greeting:** A dropdown menu set to "Formal Names".
- Congregations:** A dropdown menu set to "\*Any Congregations".
- Company Number Identifying Your Church to Env. Co.:** A text input field with the value "0".
- Show Congregation:** Radio buttons for "True" and "False", with "False" selected.
- View Report:** A button to generate the report.
- Navigation:** A toolbar at the bottom with navigation icons and a search field.

- **Greeting:** Choose **Formal with Titles**.
  - **Congregations:** Choose your specific congregation from the list
  - **Company Number Identifying Your Church to Env. Co:** Enter any customer number required by your envelope company.
  - **Show Congregation:** If your envelope company requires your congregation name on the report, choose True.
5. Click the **View Report** button.
  6. Click the **blue diskette** button and choose your company's preferred file format. (csv?)
  7. Save the file on your computer and submit it to your envelope company as usual.

## Convert to uppercase in Word

**If you used CSV during step 6 on the previous page.**

- a. Open the csv file in Word.
- b. Use **Ctrl + A** to select everything.
- c. Click the **Change Case** button on the **Home** ribbon
- d. Close and Save the file.

**If you used Excel, during step 6 on the previous page.**

- a. Use **Ctrl + A** to select everything
- b. Click **Ctrl + C** to copy everything
- c. Open Word
- d. Use **Ctrl + V** to paste everything into word
- e. Use **Ctrl + A** to select everything
- a. Click the **Change Case** button on the **Home** ribbon
- f. Click **Ctrl + C** to copy everything
- g. Switch back to Excel
- h. Use **Ctrl + V** to paste everything into Excel
- i. Close and Save the file.

