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.

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.
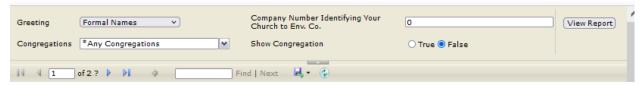
1. Click **Contributions** and click **Donors**.
2. Change the view to **Env File–No giving 18 mo.** (Shows those who haven't given in 18 months.)
3. To stop envelopes for **everyone on the list**, contact Kathy.
   To stop envelopes for **a few people on the list**,
   a.   click on their name in the 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.**

3. Click the **Reports** button and choose **Envelope File.**

4. Set up the report using the options provided:

- **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.