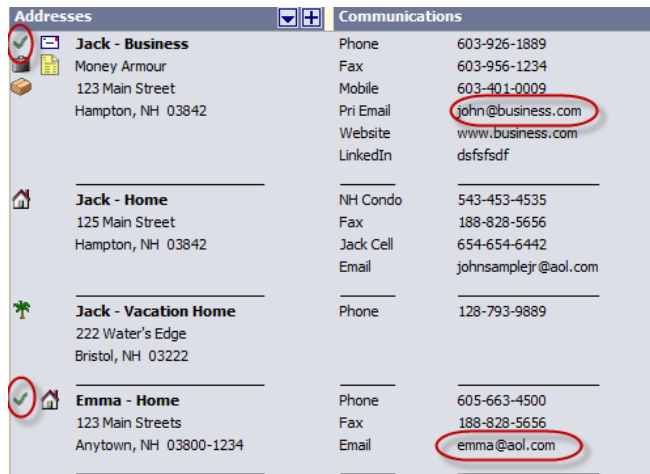
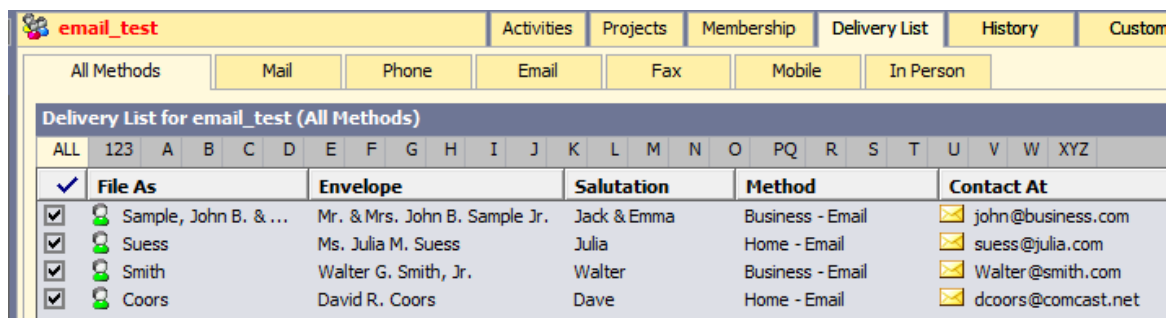


How to get a list of client and co-client emails using Merge to Word

For this method to work, the co-client email must be associated with their primary (green check) address.

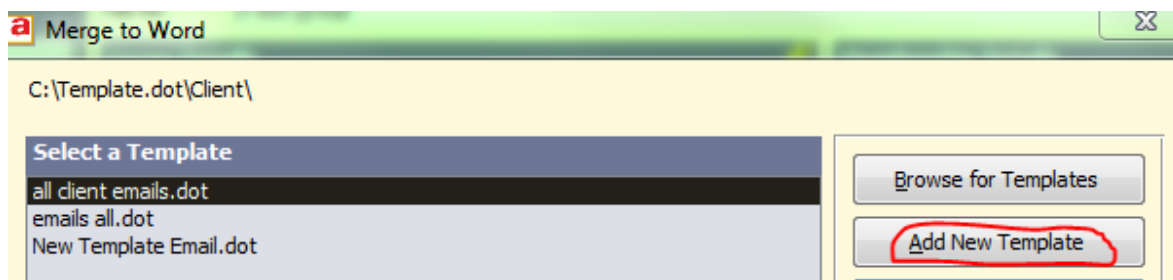


Create a group or use your current client group. Change Delivery method to email.



Select **Merge Clients to Word** in the assistant area.

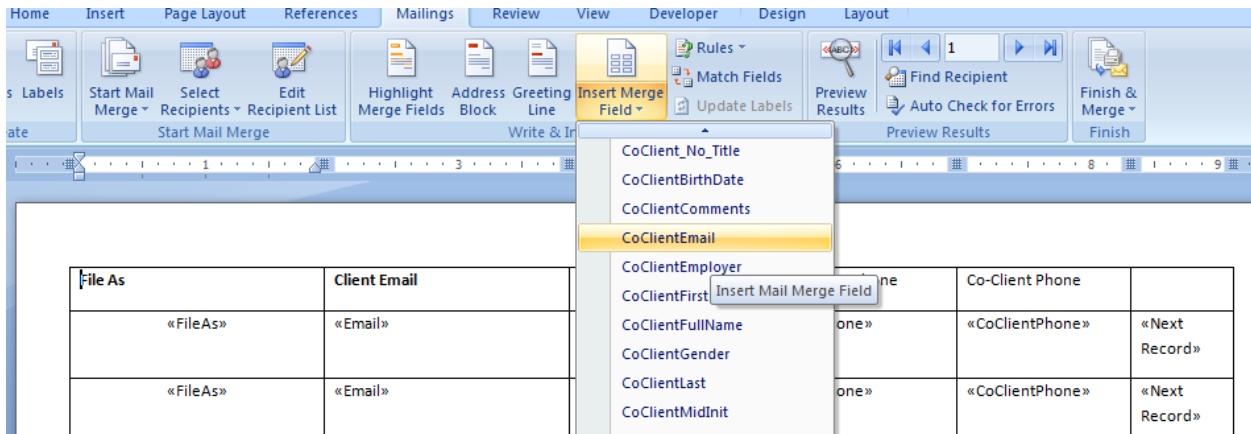
Add a new template or use the all client emails.dot if available. If using provided template, select modify template instead or do the merge if no changes are needed.



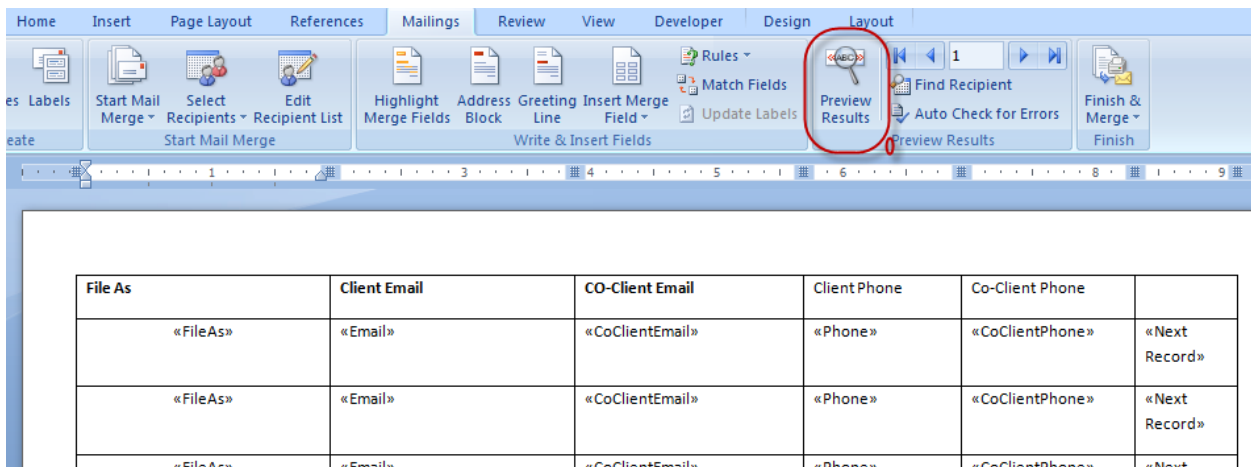
Change to landscape view.

How to get a list of client and co-client emails using Merge to Word

Insert a table. Add the fields shown below. Use “Rules” to add <<Next record>>. Copy each row to fill the page. Make sure there is enough room for all the text or the final table will not paste into excel correctly.



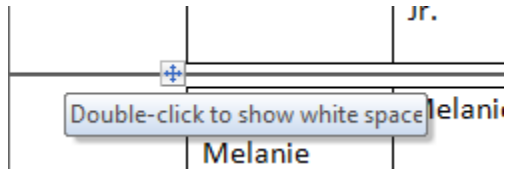
Preview Results to view the data. If the co-client email does not show up, be sure the email is linked to their primary address (green checkmark on their contact record). Then close to save.



File As	Client Email	CO-Client Email	Client Phone	Co-Client Phone
Coors	dcoors@comcast.net	mary@jones.com	603-783-7399	
Sample, John B. & Mary	john@business.com	emma@aol.com	603-926-1889	605-663-4500
Smith	Walter@smith.com	josie@jones.com	999-999-9999 x9999999	333-333-3333
Suess	suess@julia.com	diane@smithco.com	603-242-4235	

How to get a list of client and co-client emails using Merge to Word

If the list comes up separated by breaks, put your cursor on each break line and delete.



Now you have a table of names and emails that can be copied to Excel.

A screenshot of the Microsoft Word Mailings ribbon. The ribbon includes the following options: Start Mail Merge, Select Recipients, Edit Recipient List, Highlight Merge Fields, Address Block, Greeting Line, Insert Merge Field, Match Fields, Update Labels, Find Recipient, Auto Check for Errors, Preview Results, and Finish & Merge. The ribbon is set to the "Write & Insert Fields" group.

File As	Client Email	CO-Client Email	Client Phone	Co-Client Phone
dcoors	dcoors@comcast.net	mary@jones.com	603-783-7399	
Sample, John B. & Mary	john@business.com	emma@aol.com	603-926-1889	605-663-4500
Smith	Walter@smith.com	josie@jones.com	999-999-9999 x9999999	333-333-3333
Suess	suess@julia.com	diane@smithco.com	603-242-4235	