

# How to Create a Mass Mail Merge

## Description

Use this function to create mailing labels for Inquirers and Prospects. The system automatically filters Prospects with the Mailing Label Instructions: Do Not Mail, Prospect, and Inquirer. If left blank, the system will use both addresses. Mailing label instructions are set on the Prospect's profile page in the Mailing Labels section.



## Step by Step

- 1 Navigate to the RHS Actions tab
- 2 Click **New**
- 3 Select *EZ Label* as the **Record Type of New Record**
- 4 Click **Continue**
- 5 Enter an **RHS Action**. This is a detailed description of the type of mailing labels you are creating, such as "Xmas Mail-Out"
- 6 Specify **From Initial Contact Date** and **To Initial Contact Date** if you would like to filter out only Prospects and Inquirers who contacted you in a given time frame
- 7 Verify **Community**. If incorrect, specify the correct **Community**.
- 8 Check the box to **Include Inquirers** on the mailing labels
- 9 Check the box to **Include Prospects** on the mailing labels
- 10 Specify a Marketing Event if you would like to have the ability to include the list of Prospects as attendees in a Marketing Event
- 11 Check the applicable boxes for **Prospect Status**
- 12 Check the applicable boxes for **Sales Stage**
- 13 Verify the data and click **Save**

**RHS Action Edit** Save Cancel

**Information** ! = Required Information

RHS Action:  EZLabel Owner

From Initial Contact Date:  Community:

To Initial Contact Date:  Advertising:

Include Inquirers:  Marketing Event:

Include Prospects:

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**Prospect Status**

Urgent Need ASAP:  Special Need within the next 1 to 3 months:

Final Decision Process Within 30 Days:  RH Decision Made - 1 to 3 Months:

Basic Interest 4 - 6 Months:  Waiting to Sell Home 6 - 12 Months:

Preliminary Search Not Ready Yet:  Unqualified Unknown:

Do Not Contact:  Nurture Program:

Resident:  Temporary:

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**Sales Stage**

Initial Call:  Deposit:

Lost:  Moved-In:

Wait List:

Save Cancel

**14** Click **Generate Address List**

**15** Scroll down to the RHS Reports section

**16** You can see the number of Labels you will be printing. Click on the latest EMxHeader, which you have just generated.

**Custom Links**

**EMxHeader** New EMxHeader Show Report

Action	EMxHeader Name	Community	Report Title	Created Date	From Date	To Date	Number of Lines	Owner Alias
<input type="checkbox"/> Edit   Del	EMx-0010288	iaRetirement - GTA		7/6/2013			28	
<input type="checkbox"/> Edit   Del	EMx-0009737	iaRetirement - GTA		3/19/2013			29	LWies
<input type="checkbox"/> Edit   Del	EMx-0009626	iaRetirement - GTA		3/6/2013			8	LWies

**17** Click **Launch**. Conga Mail Merge will open in a new window.

EMxLines [28]

**EMxHeader Detail**

Edit Delete Clone Show Report

EMHeader Name EMx-0010288

Community iaRetirement -GTA

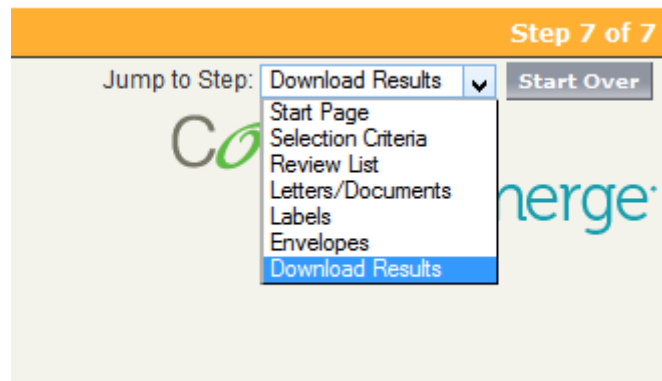
 Launch **Launch**

Created By Larry Wieskopf, 7/6/2013 3:51 PM

Edit Delete Clone Show Report

Note: At any time you can see your history and re-launch any report you have made in the past. To do this, simply scroll down to the bottom of the screen and find the list of your EMxHeaders – these are your previously generated label reports.

**18** In the picklist at the top right-hand corner of the Conga screen, select *Letters/Documents*



**19** Select a merge template from the available list

**20** Back in the picklist on the top right, select *Download Results*

**21** Click **Letters/Documents**

### Additional Options

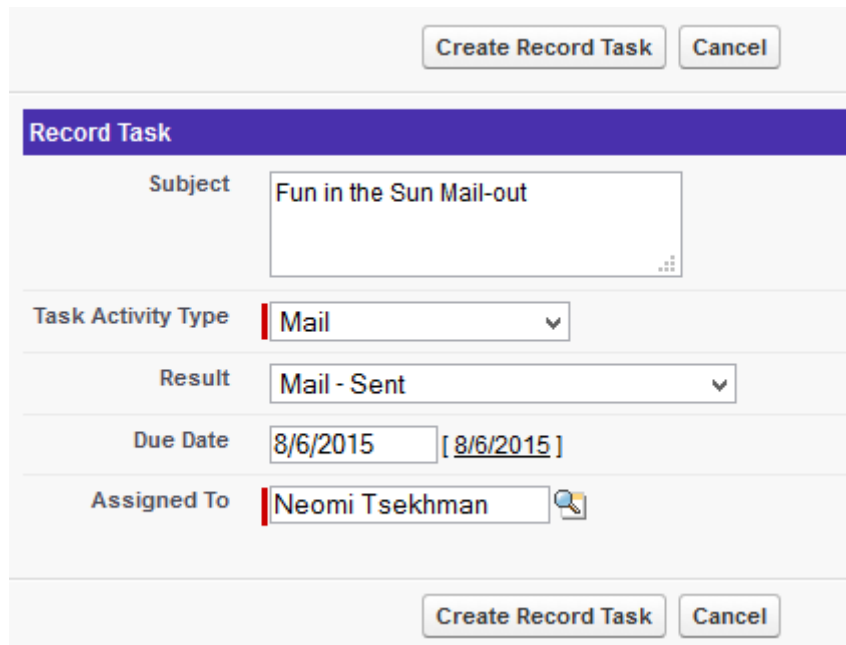
Note the buttons at the top of the report screen for the mailing labels you have created. These buttons give you several options for working with your address list:

RHS Report Detail

[Edit](#) [Delete](#) [Add to Event](#) [Record Task](#) [Create Follow Up](#)

EMHeader Name	EMx-0014639	Owner	 <a href="#">Neomi Tsekhman [Change]</a>
Community	<a href="#">RHS Sample Community</a>	EMxReport	<a href="#">Fun in the Sun</a>
Launch	<a href="#">Launch</a>	Number of Lines	125
Created By	<a href="#">Neomi Tsekhman</a> , 8/6/2015 10:03 AM		

- 1 Click **Add to Event** to include the Prospects in a list of attendees for a specified marketing event
- 2 Click **Record Task** to create a task on each Prospect's file for this mail-out. Include a result to automatically complete the task.



- 3 Click **Create Follow-Up** to create a follow-up task that will automatically be assigned to the owner of the record