# ClientWorks:
How to Create a Mailing List for Labels or Envelopes

It's easy to create a ClientWorks "Custom Quick View" to generate a mailing list, export it for review, and then use a mail merge to generate mailing labels or print envelopes for greeting cards, seminars and other events!

To create an **Excel** spreadsheet to use for a mail merge for labels or envelopes, you should start by creating a "Custom Quick View" on the **Clients** book-level tab by clicking on the plus(+) sign, naming your Quick View and selecting the green checkmark:
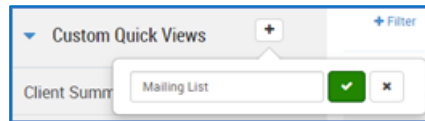
You can then add the columns you will need using the **Edit Columns** button at the top right of the screen. In **Edit Table Columns** box, first click **Remove All** to the right of **Display Columns**. Next, search for the columns suggested below under **Hidden Columns** and add them to **Display Columns** in order and hit the **Apply** button (First Name, Last Name, Mailing Address Line 1, etc.) then use the **Export** button at top right of grid to export the list as an Excel spreadsheet:
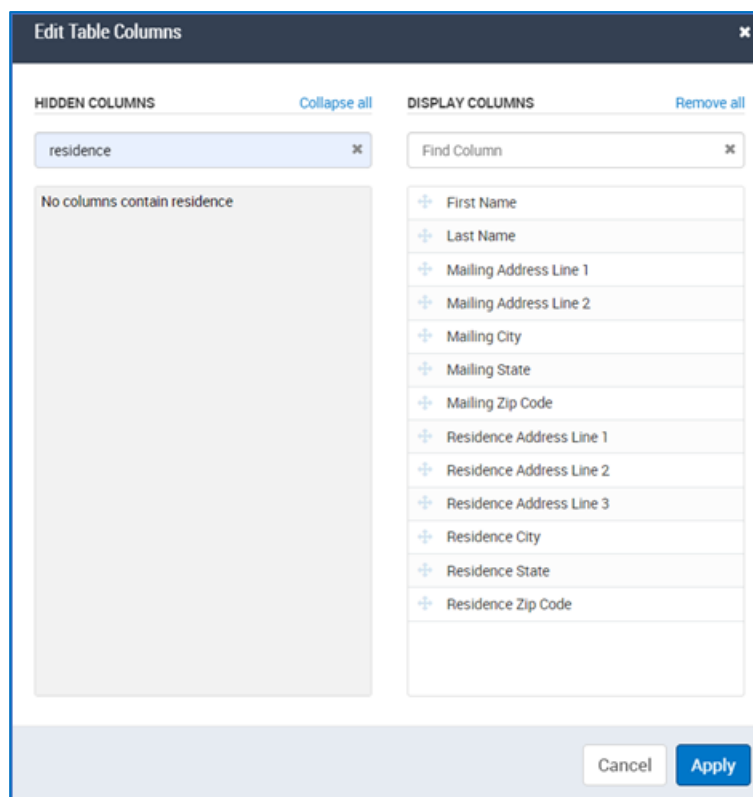
You will need to clean up the spreadsheet before you can start the mail merge. We suggest that you add both the mailing address fields and the residence address fields because when we ran some sample lists, we saw that there can be missing info in some of the mailing address fields, and there will also be situations where you may want to use the mailing address rather than the residence address for your mailing. The goal is to have only one address for each client and then delete the other columns before the mail merge.

Here is a **video** that explains how to complete a mail merge if you don't already have these instructions:

https://www.youtube.com/watch?v=BylFdTFK6t0

The instructor explains how to match the fields in your cleaned-up spreadsheet to the fields required to generate the client's name & address blocks.