

Instructions on how to export client addressed from SHIP Tools for mailing.

1. Log onto SHIP tools
2. Click - Clients Tab
3. Click on the X on the right side to remove the name of the person who logged in.
4. Click on the down arrow in the "Add filter box" – choose organization
5. Click on the down arrow in the "Add filter box" again and – choose contact date
6. Choose the time period - From: ____ To: ____ (you decide all year or just last OEP etc)
7. Click on Change Columns (on the left side of the page) the fields will be displayed. Some will have check marks in them.
8. **Uncheck** all of the boxes that may have a check mark in them.
9. Right under the Change Column is MAILING LABELS. Place a check mark in the box.
10. Click on
11. Go to the bottom of the screen – click on SHOW ALL
12. Go to the bottom of the screen – click on Excel
13. Click OPEN (it may ask if ok to open file – say yes)
14. Now your client records have been exported into an Excel spread sheet.
15. You can eliminate duplicate and incomplete records.
16. SAVE the excel spread sheet
17. FOLLOW the directions in excel under the MAILINGS tab to actually print labels, or print directly onto envelopes.