



[www.vet-booster.co.uk](http://www.vet-booster.co.uk)

How to use chameleon's  
mail merge facility



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# Introduction

Intervet's new **chameleon** service has revolutionised the way that veterinary practices design and print their booster reminder cards and other practice materials.

Now, as promised, Intervet has extended the service to include mail merging. This new service allows you to despatch personalised reminder cards to a list of clients automatically, by uploading a data file to our site.

Read on to find out how.

# What is mail merge?

Mail merge is the simple way to create multiple personalised versions of a printed item using information contained in a database or data file.

For example, imagine that you want to send the same card to 20 of your clients. Rather than beginning each one with Dear Sir or Madam, it's much more professional to use the client's actual name (Dear Mr Smith, Dear Mrs Jones, and so on).

Mail merge automates this process. You create a datafile that contains all of the names and addresses, then 'mail merge' them with your card during the printing process. You end up with 20 individually-addressed items.



# Creating your list of contacts

**chameleon's** mail merge service requires a data file in a particular format:

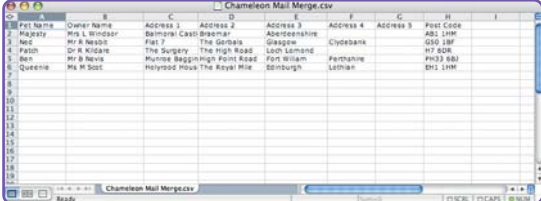
- CSV (comma delimited) (\*.csv)
- Text (tab delimited) (\*.txt)
- Text (semicolon delimited) (\*.txt)

The data for each record (each client contact) must at least contain the following fields:

- Pet Name
- Owner Name
- Addresses 1-5
- Postcode

The data file can usually be generated directly from your practice computer system. If in doubt, contact your practice management system supplier.

Here's an example of comma delimited file:



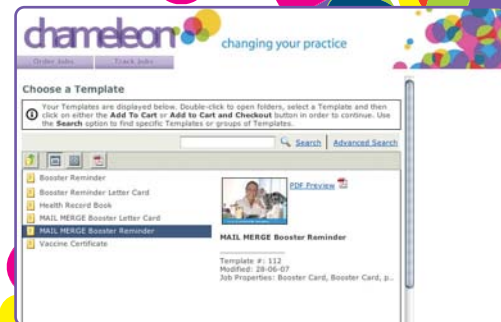
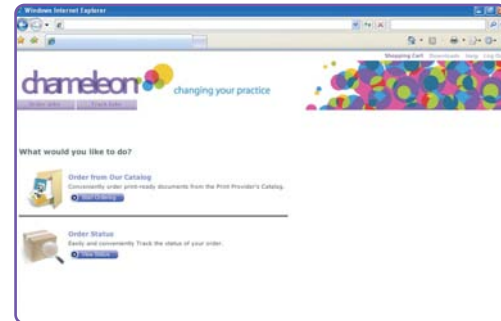
	A	B	C	D	E	F	G	H	I
1	Pet Name	Owner Name	Address 1	Address 2	Address 3	Address 4	Address 5	Post Code	
2	Majesty	Mrs L Windsor	Balmoral Castle	Brisbane	Aberdeenshire			AB1 1NH	
3	Mel	Mr R Meach	Fair T	The Gables	Glasgow	Clydebank		G16 1BP	
4	Pat	Dr R Kidare	The Surgery	The High Road	Loch Lomond			H7 8DW	
5	Mel	Mr B Neve	Munro Baginhigh	Fort Road	Fort William	Ferintosh		PH13 8BJ	
6	Queenie	Ms M Scott	Hydrood House	The Royal Mile	Edinburgh	Leithan		EH1 1NH	
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# Starting your mail merge project

Once you've created your data file, containing the names and addresses of all the clients to whom you wish to send a personalised item, you can begin.

Log on to the **chameleon** website [www.vet-booster.co.uk](http://www.vet-booster.co.uk) entering your user name and password in the usual way. Then click on **Order From Our Catalogue**.

You'll see that we've added two new **MAIL MERGE** options: one for a booster reminder card and another for a longer letter card (useful as a follow-up reminder). We'll look at the booster reminder card first.



# Booster reminder cards

Select 'MAIL MERGE Booster Reminder' and click **Continue**. The screen that follows contains a number of options that allow you to customise the card.

**Front image:** Select one of our standard images or upload one of your own, in the normal way. The selected image will display in the small window.

**Pet Name (merge field):** Where you see the words 'merge field', they indicate a field that will be filled during the printing process by information from your data file. Leave the box empty.

**Front Message:** Here you can edit the text that will appear on the front of all the reminders.



The screenshot shows the 'chameleon' software interface with the tagline 'changing your practice'. The main heading is 'Enter the Variable Data'. Below this, there is a sub-heading 'Complete the Variable Data fields. In order to add additional Variable Data records, click on the **Add Records** link below.' The form contains several fields: 'Front Image:' with a dropdown menu showing 'Cat Lady make-up.jpg' and a small image thumbnail; 'Pet Name (Merge Field):' with an empty text box; 'Front Message:' with a text area containing 'Your annual pet health check and booster vaccinations are due.'; 'Dear:' with a text area containing 'Dear'; 'Client Name (Merge Field):' with an empty text box; and 'Back Message:' with a text area containing 'Your annual pet health check and booster vaccinations are now due. Please contact your surgery to make an appointment.'

# Booster reminder cards

**Dear:** The salutation that appears before the client's name.  
Best to leave this alone!

**Client Name (merge field):** Another merge field that will be filled during the printing process by information from your data file. Leave empty.

**Back Message:** Edit the message that appears on the back of all your cards.

**Practice Details:** Allows you to upload a picture (.JPG) such as the practice logo, to appear on the reverse of all your cards.

**Address Lines, Postcode etc:** As you scroll down, you'll see all the other merge fields. Beneath them all is a link to 'Add Records', which is how you upload your data file. Click on it.



# Uploading your data file

The screen which now appears allows you to upload your data file by locating it on your computer (click **Choose File** to do so). Ensure the file format is set to the correct file type for your data file.

If the first line of your data file contains the header field names for each record (eg. pet name, owner name etc.), check the button '**First Row Contains Field Names**': it means the first line will be ignored.

The screenshot shows the 'Add Variable Data Records' interface. It features a 'Choose File' button and a 'Chameleon Mail Merge.csv' file name. The 'File Format' section is set to 'CSV (Comma delimited (\*.csv))' with a dropdown arrow. The 'Encoding' is set to 'Western European 1252' with a dropdown arrow. There is an option for 'Upload, Using a Custom Scheme' with a 'Custom Scheme' dropdown set to 'Last Used'. A 'Manually Create Records' option is also present. A note at the bottom states: 'Note: The following text file types are supported: Comma Delimited (\*.csv), Tab Delimited (\*.txt) and Semicolon Delimited (\*.txt)'.

The screenshot shows the 'Upload Variable Data Database' interface. A checkbox labeled 'First Row Contains Field Names' is checked. Below this is a list of fields with corresponding dropdown menus for mapping. The fields and their current mappings are:

Field	Mapping
1. Front Image:	Do not import from database
2. Pet Name (Merge Field):	Do not import from database
3. Front Message:	Do not import from database
4. Dear:	Do not import from database
5. Client Name (Merge Field):	Do not import from database
6. Back Message:	Do not import from database
7. Practitioner Details:	Do not import from database
8. Client Name (Merge Field):	Do not import from database
9. Address Line 1 (Merge Field):	Do not import from database
10. Address Line 2 (Merge Field):	Do not import from database
11. Address Line 3 (Merge Field):	Do not import from database

# Uploading your data file

For each field labelled with (Merge Field), simply map to the correct field in your data file using the drop down boxes. For all other fields leave as "Do not import from database"

Go down the list as far as 'Postcode', then click **Continue** when you're happy with your selections.

Things get easier on subsequent visits. As long as you always format your .csv data files in the same way, you can select **Upload** using a custom scheme, custom scheme last used, and your data will be imported in the same way as before. Again don't forget, if the first line of your data file contains the header field names for each record, check this button: it means the first line will be ignored.

First Row Contains Field Names

Fields:

1. Front Image: Do not import from database
2. Pet Name (Merge Field): Field 1 - Sample: Pet Name
3. Front Message: Do not import from database
4. Dear: Do not import from database
5. Client Name (Merge Field): Field 2 - Sample: Owner Name
6. Back Message: Do not import from database
7. Practice Details: Do not import from database
8. Client Name (Merge Field): Do not import from database
9. Address Line 1 (Merge Field): Field 1 - Sample: Pet Name
10. Address Line 2 (Merge Field): Field 2 - Sample: Owner Name
11. Address Line 3 (Merge Field): Field 3 - Sample: Address 1

Scheme: New Scheme

Go Back Continue

chameleon changing your practice

Other Jobs Track Jobs

Add Variable Data Records

Upload a Database File  Choose File Chameleon Mail Merge.csv

Select File Format:

File Type: CSV (Comma delimited) (\*.csv)

Encoding: Western European 1252

Upload, Using a Custom Scheme:

Custom Scheme: Last Used

Manually Create Records

Note: The following text file types are supported:  
Comma Delimited (\*.csv), Tab Delimited (\*.txt) and Semicolon Delimited (\*.sct)

# Preview the job

The next screen offers a preview of your mail merged cards; Highlight one of the cards listed on the right of the screen to view.

Note that, at this point, you have the option to customise individual cards. This can be particularly useful if you know your clients well and wish to insert messages or pictures that will personalise your cards even more effectively.

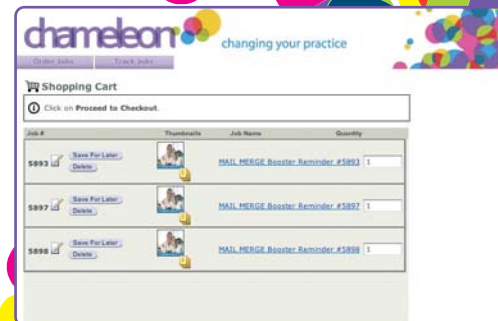
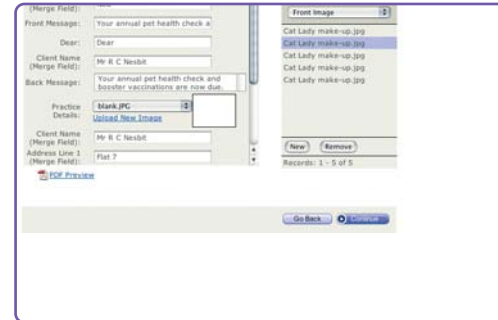


# Preview the job

Finally, when you're happy with the way all your data has merged, click **PDF preview**. This will show you exactly how the entire print job will look when printed.

Finally, click on **Add to Cart and Checkout**, to send your mail merged reminder cards to print.

**Note that the quantity - 1 - refers to the entire mail merge job, however many cards you've decided to print.**

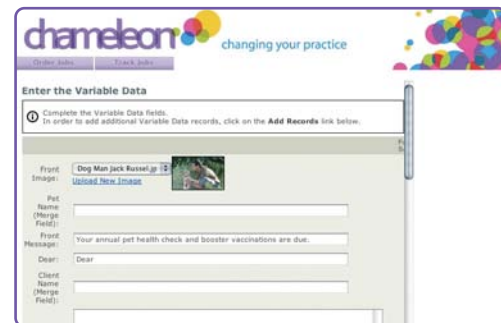
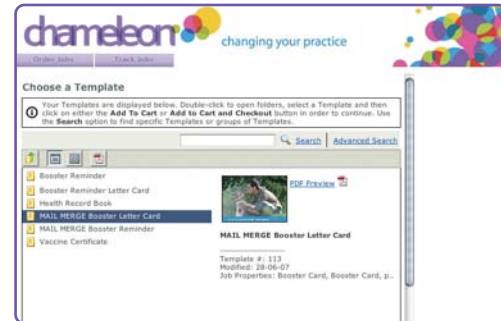


# Reminder letter cards

You'll be pleased to hear that these cards are sent in much the same way. Simply select 'MAIL MERGE Booster Letter Card' and click **Continue**, then proceed as before.



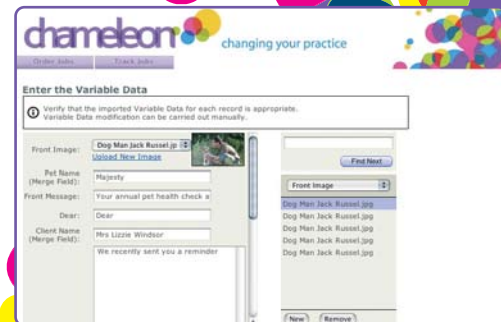
The reverse of a 'Booster Letter Card'.



# Reminder letter cards

The only difference is that you're now given a much larger text field, in which you can write a longer letter to your clients. Use it to explain the benefits of revaccination and any other important messages you may wish to communicate. You can either 'free text' in your message, or prepare it in a word document beforehand and simply copy and paste it into the letter field.

Thereafter, everything proceeds as before.



# chameleon Terms and Conditions

## 1 Web Site Terms of Use

This Web Site is owned and operated by Intervet UK Limited, a limited liability company incorporated in England and Wales under company number 946942.

Intervet UK Limited is referred to in these terms and conditions as "we" "us" or "our".

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## 2 Product Specifications

We endeavour to display and describe as accurately as possible the printed colours of our products that appear on the Web Site. However we cannot guarantee that your monitor's display of any colour will accurately reflect the colour of the product delivered.

## 3 Use of Chameleon

- 3.1 Chameleon (which includes the Web Site, associated software, printing and delivery of printed materials) is provided for the production and delivery of support materials for Intervet's Novovac vaccines for use in your practice (at a reasonable level, which is set at our discretion). We may give you permission for the system to be used to produce support material for other Intervet products; however this must be provided separately. You may not use the Chameleon system for any other purpose, unless we provide specific written permission, and in these cases a charge will be made. We reserve the right not to process your order if we decide that you are using the Web Site for purposes not permitted by us and ban you from placing orders with us in the future.

- 3.2 You agree that you will only upload images where you have the permission of the copyright owner. To be able to administer the Chameleon system appropriately, we need to be able to copy and reproduce any image uploaded by you within our internal systems. You agree that in uploading an image, you give permission for us to use the image internally for this purpose. However, we do not gain any rights to the image, or to its use outside Intervet.

## 4 Intervet Images

The images provided by us are provided for use only with the Chameleon system. Intervet retains copyright for all images provided within the Chameleon system or separately from our staff and you do not gain any rights to use the images other than with the Chameleon system.

## 5 Responsibility

You agree that you retain all responsibility for the use of the Chameleon system, including the accuracy and appropriateness of all material you enter into it. If extra prints are required due to errors or changes on your part, you agree that we may levy a charge for that.

## 6 Service level and disclaimer

We will endeavour to have the Chameleon Web Site available from 4am to midnight every day (with the exception of any pre-announced shut-downs for maintenance purposes) and for printed materials to be despatched from the printer within 72 working hours of a valid order

being placed. However, the Web Site is provided on an "as is" and "as available" basis without any representation or warranty of any kind, whether expressed or implied, including, but not limited to, the implied warranties of merchantability, fitness for a particular purpose or non infringement. Intervet, its parents, subsidiaries, affiliates or employees shall in no event be liable for any damages of any kind or nature whatsoever, including, without limitation, direct, indirect, special, consequential or incidental damages resulting from or in connection with your inability to use the Chameleon service or resulting from or in connection with any materials or information on this Web Site.

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## 8 Privacy and Data Protection

8.1 In connection with your use of this Web Site, we will observe our Privacy Policy which can be accessed on our public web site.

8.2 We will process your personal data in accordance with the Data Protection Act 1998. We will not disclose to third parties any personally identifiable information uploaded by you to the Web Site without your consent except where it is necessary for the performance of our services, which shall include mail merge when available. Such personal data shall remain owned by you and we shall not acquire any rights in relation to such data.

## 9 Amendment

We may at any time make modifications, improvements and/or changes to these terms and conditions, the information, names, images, pictures, logos and icons displayed on this Web Site or the products and services referred to in this Web Site without notice.

## 10 General

10.1 These terms and conditions constitute the entire agreement in respect of the use of the Web Site and the items and services offered via the Web Site.

10.2 If any of these terms and conditions is found to be invalid this shall not affect the validity of the remaining provisions which shall remain fully enforceable. No waiver by us of any term shall be deemed to be continuing or shall be deemed to be a waiver of any other term.

## 11 Applicable law and jurisdiction

These terms and conditions shall be governed by, construed and enforced in accordance with the laws of England and Wales and will be subject to the non-exclusive jurisdiction of the English Courts.



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