# Merging Letters

A Microsoft Word merge consists of 3 files which are "merged" together – a **contact list**, a **shell letter** and a **scrap document**.

Exporting the <u>contact list</u> from Ministry Platform

1. Clear any sticky/saved selections:
   a. Click **Home** on Ministry Platform's menu and click **My Selections** on top of screen.
   b. If anything appears on this page, click the **check box** at the bottom of the screen.
   c. Click the **Actions** button and choose **Clear** and then **c**lick the **Clear** button.
2. Click **Contacts.**
3. Select everyone to whom you would like to send your letter depending on your needs.
4. Click the **Report** button and choose **Selected Mail Merge: 1 per Family – Erie.**
5. Make choices on the window that appears
   a. **Address Filter:** Usually All Records
   b. **Omit if Any Contact Has Email:** Choose **False** if you want to print letters for everyone. Chose **True** if you plan to email those who have email instead.
   c. **Sort Order:** Choose Name or Zip order.
   d. **Omit Bulk Mail Opt Out:** Choose True here to eliminate people who have opted out.
6. **Click the View Report button.**
7. Click the **diskette** button and choose **Excel**.

8. Open the spreadsheet if it doesn't automatically open for you. Depending on your browser, the spreadsheet will either open or be saved to your downloads folder.
9. Click the **Enable Editing** button if one appears.
10. **File**, **Save As** to drop it somewhere memorable because you will need it later. I suggest you name the file **mergelist.xlsx** and put it in a folder named **MP Merge** so things are easy to find.
11. Close Excel and the small MP window pictured above.
12. Clear your selections

   a. Click the arrow next to **All Records** in the lower right corner and choose **Current/Unsaved Section**.
   b. Click the **x** to deselect your contacts.
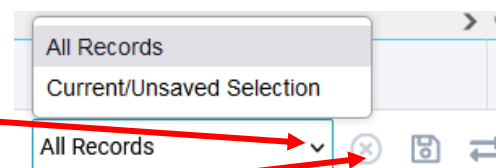
Setting up your <u>Shell Letter</u>.   (These instructions assume the list is named **mergelist.xlsx**)

1. Open your letter.   You can insert your letterhead and your Pastor's scanned signature.

2. Click the **Mailings** ribbon.

3. Click the **Start Mail Merge** button and choose **Step by Step Mail Merge Wizard.**

   A **task pane** will appear to the right of the screen. It will say **Step 1 of 6.**

4. Click **Letters** at the top of the task pane and then click **Next: Starting Document** at the bottom of the taskpane. The **Step 2 of 6** task pane will appear

5. Select **Use the current document.** And then click **Next: Select recipients** at the bottom of the task pane. The **Step 3 of 6** task pane will appear.

6. Click **Use an existing list** at the top of the task pane.
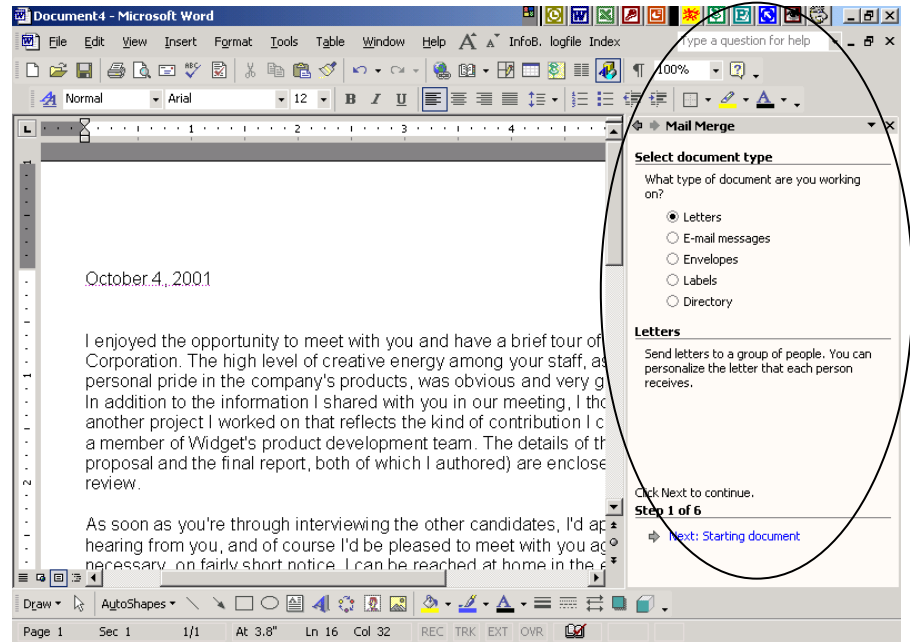
7. Click the **Browse** link on the task pane.

8. Click the **mergelist.xlsx** file name and click **Open**. The **Select Table** window will appear.

9. Click **OK**. The **Mail Merge Recipients** screen will appear.
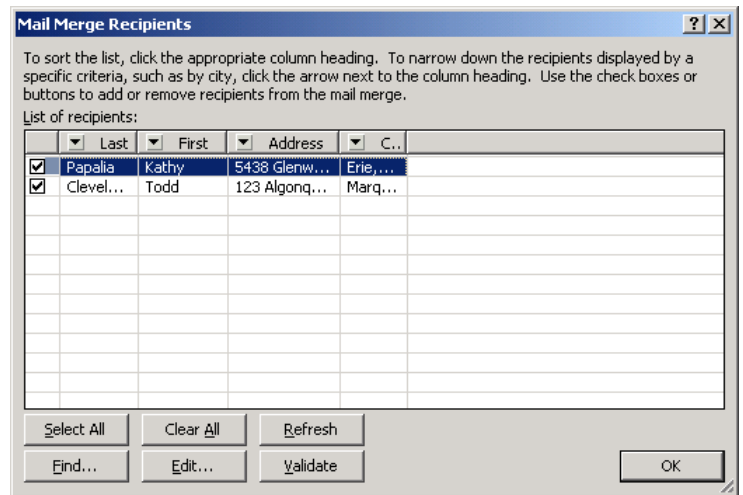
10. Click **OK**. (If you want to stop certain people from receiving this letter you can un-check them on this screen.)

11. Click **Next: Write your letter**. at the bottom of the task pane. The **Step 4 of 6** task pane will appear.

12. Put your cursor in your letter where you want the date to appear and insert the date. Press Enter a few times to add some space between the date and the address block.

13. Put your cursor in your letter where you want the address block to appear.

14. Click the **Address Block** link at the top of the task pane.

15. Click the **Match Fields** button on the **Insert Address Block** screen.

16. Match fields as shown in the screen shot.

17. Click **OK** twice.

18. Press the **Enter** key twice to put a blank line after the Address.

19. Type **Dear** and press the **space bar** once.

20. Click the **More Items** link on the task pane.

21. Click **Salutation** and then click the **Insert** and then **Close** buttons.

22. Type a comman or colon and press Enter twice to put a blank line between the salutation and the body of the letter.

23. Click **Next: Preview your letters** at the bottom of the task pane. The **Step 5 of 6** task pane will appear.

24. Use the arrow buttons **<<** or **>>** on the task pane to scroll through your letters. Check for missing fields and punctuation.

Match Fields dialog:

> **Match Fields**   ?   ✕
>
> In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component
>
> **Required for Address Block**
>
> | First Name | Fam Mailing Name |
> | Last Name | (not matched) |
> | Suffix | (not matched) |
> | Company | (not matched) |
> | Address 1 | Fam Address 1 |
> | Address 2 | Fam Address 2 |
> | City | Fam City Only |
> | State | Fam State Only |
> | Postal Code | Fam Zip_ |
> | Country or Region | (not matched) |
>
> **Optional information**
>
> | Unique Identifier | (not matched) |
>
> Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)
>
> ☐ Remember this matching for this set of data sources on this computer
>
> [OK]   [Cancel]

25. Click **Next: Complete the Merge** at the bottom of the task pane. **The Step 6 of 6** task pane will appear.

26. Click **File** and choose **Save**.   You've done a lot of work and should save your changes.

27. Click **Edit individual letters** at the top of the task pane. The **Merge to new document** pop-up will appear.

28. Click **All**. And choose **OK**. Your letters will build in another document named Letters#. (If you only want to print the current record or a range of letters, you can do that too on this pop up too.)

29. A new document named Letters1 will appear.   This is what I refer to as a scrap document. I call it a scrap document because once you print the letters you can close this document without saving it.

    You can print the scrap document in groups if you need to.   You can edit specific letters here and there if you need to tweak their address or salutation.   You can even add special notes for the pastor.

30. Put any special paper in the correct drawer in the printer.

31. Click **File** and choose **Print**.

32. Click **Close** and click **Don't Save** because you don't need to save your scrap document.