



Mail Merges

AWARDS INSTRUCTION SHEET

Several reports within AWARDS give users the option to export the data contained in them to a Microsoft Excel spreadsheet. This allows users to use the data in more meaningful ways, including completing a mail merge. Mail merges are typically helpful when sending the same document to many people.

Note that this document outlines steps on using Microsoft Word's mail merge feature; however, Foothold Technology and its Help Desk do not offer technical support on this product, as it is outside the AWARDS application. If further information is needed, please refer to Microsoft's help resources and tools.

The permissions required to use the steps outlined in this document will vary based on which AWARDS report is being run.

ABOUT THIS DOCUMENT

This document is intended to guide you through the process of creating a report in AWARDS, exporting report data into an Excel spreadsheet, and using it to generate letters/mailings using Microsoft Word's mail merge feature. Specific topics covered are:

- [Creating an Excel Spreadsheet](#) – Learn to create an Excel spreadsheet from a report in AWARDS. Page **1**
- [Creating a Document with Mail Merge](#) – Create a document/letter with mail merge capabilities. Page **2**
- [Creating Labels with Mail Merge](#) – Learn to create labels with mail merge capabilities. Page **3**

CREATING AN EXCEL SPREADSHEET

The following steps can be adapted for any report in AWARDS that has an Excel File link. To create an Excel spreadsheet from an AWARDS report, complete the following steps:

1. Within AWARDS, run the desired report which contains the fields that are to be utilized for the mail merge.

If running the Demographics Report, fields such as "Name (First Last)," "Street Address" and "City State Zip" are fields that should be typically be included in the report for a mail merge.

For information on running a certain report within AWARDS, please refer to Online Help.

2. Once the report is displayed, click the **Excel File** link. Depending on the set-up of the user's computer, the report data will automatically be exported into a new Excel spreadsheet, or a browser window.
3. Clean up the spreadsheet by deleting the lines that display any report setting from the top, and any totals from the bottom of the sheet.

Be careful not to delete the header row containing the column names. That row will be needed in order to complete the mail merge.

- Save the Excel spreadsheet to your computer or a separate drive, renaming the file if desired.

The process of creating an Excel spreadsheet is now complete

CREATING A DOCUMENT WITH MAIL MERGE

Using Microsoft Word, a document can be created containing the text of a letter to be sent to multiple people using the mail merge feature. To do so, complete the following steps:

These steps outline the procedure for Microsoft Word 2007. For instructions using a different version of Word, or for more information, please refer to Microsoft's help resources and tools.

- Open Microsoft Word.
- Click the **Mailings** menu tab. 
- Click the **Start Mail Merge** icon. A drop-down list of options is displayed.
- Click **Letters**.
- Click the **Select Recipients** icon. A drop-down list of options is displayed.
- Click **Use Existing List...** A *Select Data Source* pop-up window is displayed.
- Select the Excel file that was previously saved on your computer or separate disk.
- Click **Open**. The *Select Table* pop-up window is displayed.
- Click the check box next to **First Row of Data Contains Column Headers** so that it is checked.
- Click **OK**.
- The **Edit Recipient List** icon will now be available. If necessary, this icon can be used to edit the merge list, or adding/removing records from the merge.
- Enter text in the body of the document as appropriate. When you reach an area in which you would like to insert a field from the spreadsheet, click the **Insert Merge Field** icon. A drop-down list of fields contained in the spreadsheet is displayed. 
- Select the field to be inserted and click **Insert**.
- Continue entering text in the body of the document as necessary, repeating steps 12 – 13 each time you reach an area that should contain a merged item.
- After the document is complete, to preview your results click the **Preview Results** icon. The arrows that appear to the right of the icon can then be used to flip from page to page.
- Once the document is complete, click the **Finish & Merge** icon. A drop-down list of options is displayed.

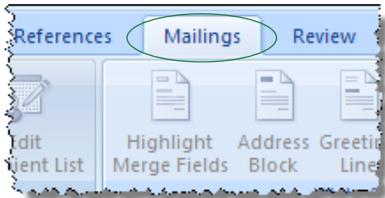
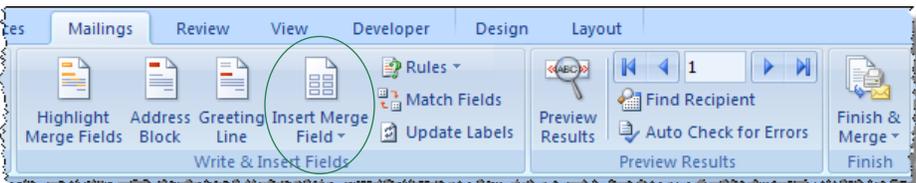
- **Edit Individual Documents** - This option will open a new Word document containing all of the letters with the fields and information to be merged inserted. This view allows you to edit each individual letter, if necessary.
- **Print Documents** – This option will print the document as is, and provides the options to print either “All,” “Current Record,” or a “Selection.”

The process of creating a document using the Mail Merge feature is now complete.

CREATING LABELS WITH MAIL MERGE

Using Microsoft Word, mailing labels can be created using the mail merge feature. To do so, complete the following steps:

These steps outline the procedure for Microsoft Word 2007. For instructions using a different version of Word, or for more information, please refer to Microsoft's help resources and tools.

1. Open Microsoft Word.
2. Click the **Mailings** menu tab. 
3. Click the **Start Mail Merge** icon. A drop-down list of options is displayed.
4. Click **Labels**. The *Label Options* pop-up window is displayed.
5. Select your printer and label information in this window, as appropriate.
6. Click **OK**.
7. Click the **Select Recipients** icon. A drop-down list of options is displayed.
8. Click **Use Existing List...** A *Select Data Source* pop-up window is displayed.
9. Select the Excel file that was previously saved on your computer or separate disk.
10. Click **Open**. The *Select Table* pop-up window is displayed.
11. Click the check box next to **First Row of Data Contains Column Headers** so that it is checked.
12. Click **OK**.
13. The **Edit Recipient List** icon will now be available. If necessary, this icon can be used to edit the merge list, or adding/removing records from the merge. The cursor will appear in the first label, and a “Next Record” label will appear in each label of the document.
14. Click the **Insert Merge Field** icon. A drop-down list of fields contained in the spreadsheet is displayed. 
15. Select the field to be inserted and click **Insert**.

16. Repeat steps 14 – 15 for each field to be inserted in the label.
17. If necessary, update the font and format of a label and click **Update Labels** from the tool bar.
18. After the labels are complete, to preview your results click the **Preview Results** icon. The arrows that appear to the right of the icon can then be used to flip from page to page.
19. Once the labels are complete, click the **Finish & Merge** icon. A drop-down list of options is displayed.
 - **Edit Individual Documents** - This option will open a new Word document containing all of the labels with the fields and information to be merged inserted. This view allows you to edit each individual label, if necessary.
 - **Print Documents** – This option will print the labels as is, and provides the options to print either "All," "Current Record" or a "Selection."

The process of creating labels using the Mail Merge feature is now complete.