Step One: Download Records

Begin by downloading the records you wish to use for your mail merge.

1. Select desired search parameters on the main search screen and click Go.

2. In the lower left corner of the Search Results screen, choose Mailing List in the "Download Search" drop-down and click Go. If you wish to include other fields beyond the basic mailing list fields in your merge document (including custom form responses), create a custom download template and simply choose that template in this step.

3. Include additional contacts, if desired.

4. Remove duplicates, if desired.

5. Save file to your local PC or network in .csv file format, making a note of where you have saved it.

Step Two: Create Your Microsoft Word Document

Next, you need to create the document you wish to use for the mail merge in Microsoft Word.

1. Open Microsoft Word and go to Tools>Letters and Mailings>Mail Merge Wizard and follow the wizard to create your document.

2. When the system asks you to Select Recipients, click on Browse under the Use Existing List heading. Browse on your local PC or network to locate the .csv file you created. When the mail merge recipients pop-up window comes up, check that this is the correct file and click OK.

3. Continue writing your document, inserting merge fields by using the options presented by the wizard. To see all of the fields available in your file, click on the "More items" choice in the wizard to bring up the full list. Highlight the field you want to use and click insert. Click Close to close the full field list window.

Step Three: Merge

1. Follow the final steps of the Merge Wizard to perform the merge and create your final merged documents.

Note: In Step Two, you may also choose Tools>Letters and Mailings>Show Mail Merge Toolbar. In the merge toolbar, click on the Open Data Source icon to select your .csv document as your source file and click OK when the file is displayed in a pop-up. Then use the toolbar options to insert certain types of fields or click on Insert Merge Fields to display the full list.

Additional help on creating merge documents in Word can be found at
http://office.microsoft.com/assistance/preview.aspx?AssetID=HP052588511033&CTT=98.