

Membership Application Mailmerge

Introduction

This manual is for Society of Recorder Players branch membership secretaries. It describes how to generate membership application and renewal forms for your branch from using the master document **SRP_membership_application_mailmerge.docx** on the website at <http://www.srp.org.uk/admin-documents/>

You can use this document for two purposes:

1. At the beginning of the year, you can generate a blank application form plus a renewal form for everyone who was a member in the previous year. They can check their details and don't have to fill in unchanged information. This form can be emailed automatically to the member or printed.
2. When your branch has been entered into the membership system, you can generate forms that reflect what has gone into the membership database, and check these against the forms your members completed. You need to do the following:
 1. Tailor the mailmerge document to your own branch.
 2. Obtain the spreadsheet of last year's members
 3. Run Mail merge to create the membership forms

These actions are described in the following sections.

Please note that this only works with Microsoft Word. You cannot use the mailmerge document in Open Office Writer.

Tailoring the document for your branch

1. Download the document from the website and save it on your computer. You can choose any name you like.
2. Open the document. The parts in red are specific to your branch. (The parts in blue and anything enclosed in <<>> are the mailmerge fields: do not, of course, change them.)
3. Your branch name and the year will be filled in automatically. However you do need to fill in:
 - a. The introduction. If you are printing the form, you will probably want simply to delete this. However, if you are emailing the forms automatically, you will probably want to write some text explaining why this form is being sent.
 - b. How the form should be returned.
 - c. The payment instructions under the table of subscriptions. You can edit any part of these to suit your branch, not just the parts in red.
4. You will probably want to change the red text to black.
5. Save the document.

You need only do this once – all the changeable data are inserted automatically¹.

Obtain the mailmerge data

Go to the Edit tab and select your branch. Select the year for which you want the forms. If you have not already done so, enter the branch subscriptions and save the information. Note that you can enter branch subscriptions before the start of the membership year, even though you can't, of course, edit membership information at that point.

¹ Note also that for existing members, the form title changes from "Application" to "Renewal" and the introductory line "Please complete the personal details on the form" is reworded to "To renew your membership, please check your details on the form below and indicate any changes"

Once you have saved the branch subscriptions, click the



button. This will offer

you a csv data file, which you should save on your computer.

Run Mail merge to create the membership forms

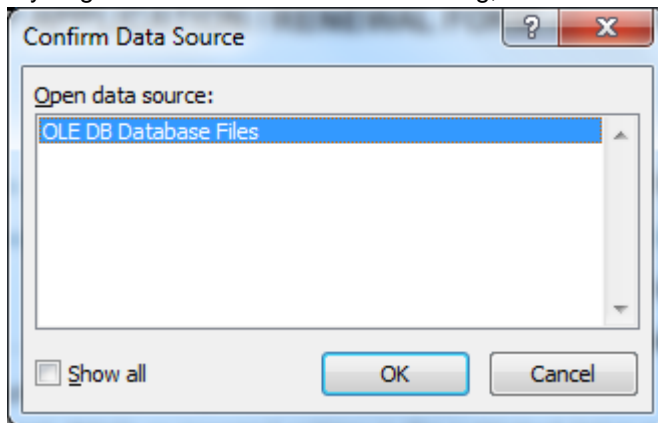
This process varies a bit depending on the version of Word that you are using. The following instructions give a basic process for each version of Word. This basic process either emails the forms directly or generates a single document that contains a blank form for new members, followed by a form for each previous or existing member. You can of course choose which of these you want to print.

You can of course vary this process: for example there are ways of choosing which forms to produce, or of printing the results directly.

Open the mailmerge document and follow the instructions for your version of Word. If you are prompted to run an SQL command, click **Yes**.

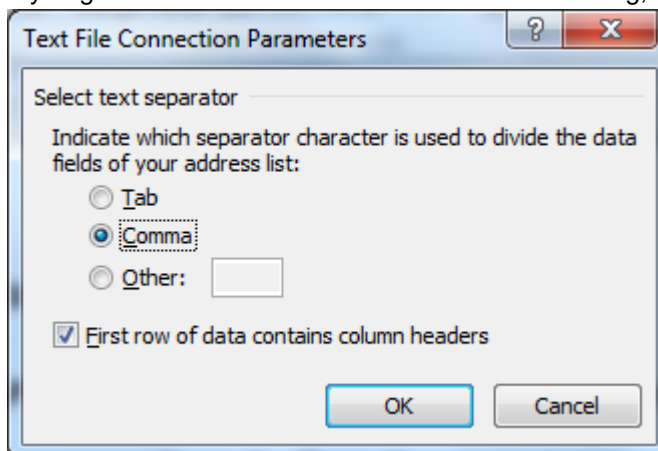
Word 2007 or later

1. Click the **Mailings** tab in the ribbon
2. Click **Start Mail Merge**, then choose either **E-Mail Messages** or, for printed forms, **Letters**
3. Click **Select Recipients** then **Use Existing List...** and open the spreadsheet.
 - a. If you get a **Confirm Data Source** dialog,



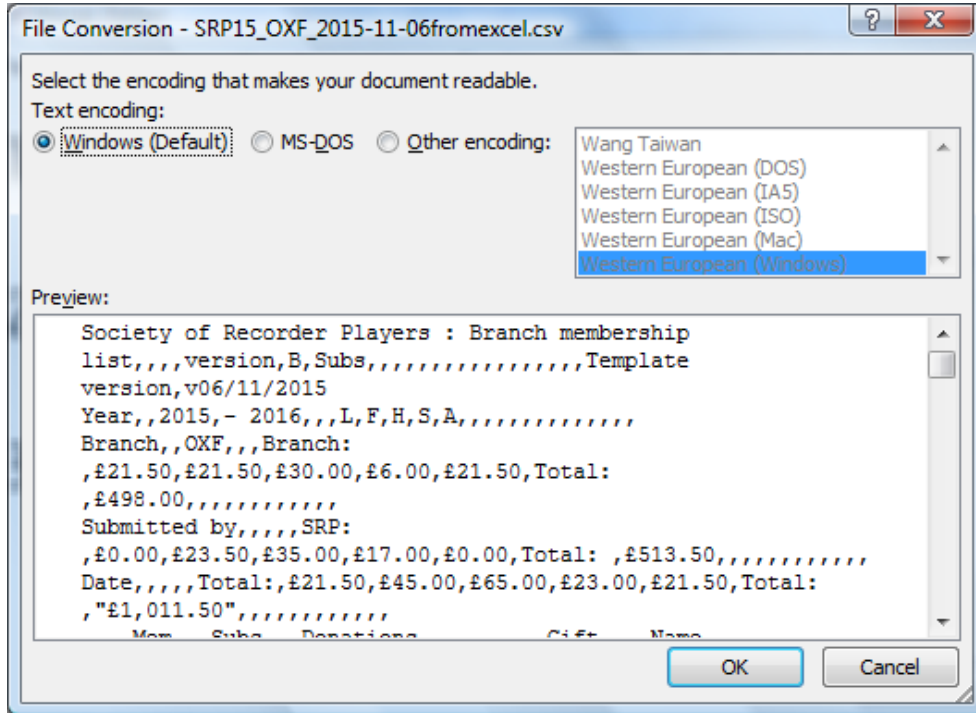
click **OK**

- b. If you get a **Text File Connection Parameters** dialog,



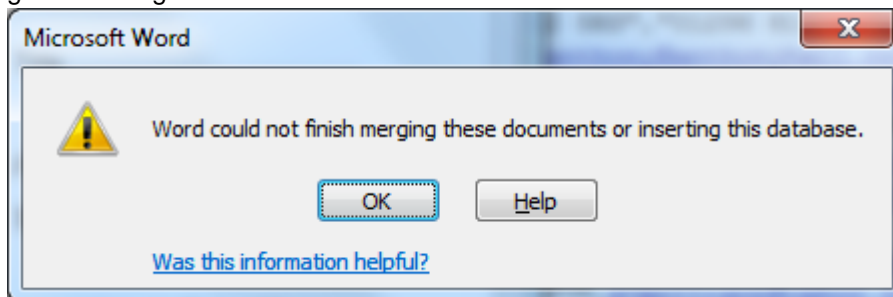
select **Comma** as the text separator and check **First row of data contains column headers**. You may find that this dialog appears twice – repeat the same settings

- c. If you get a **File Conversion** dialog



make sure that **Windows (Default)** is selected and click **OK**

4. In the **Mailings** tab, click **Finish & Merge**. and then either
- Send Email Messages...** In the dialog, make sure the **To:** is set to **eMail** and enter a **Subject Line** for your email. Set the **Mail Format** to **Attachment²**, and click **OK**.
 - Edit Individual Documents...**, In the **Merge to New Document** dialog click **OK**. You may get a warning like this



or a warning that **Record ... was an empty record** Ignore it by clicking **OK**.

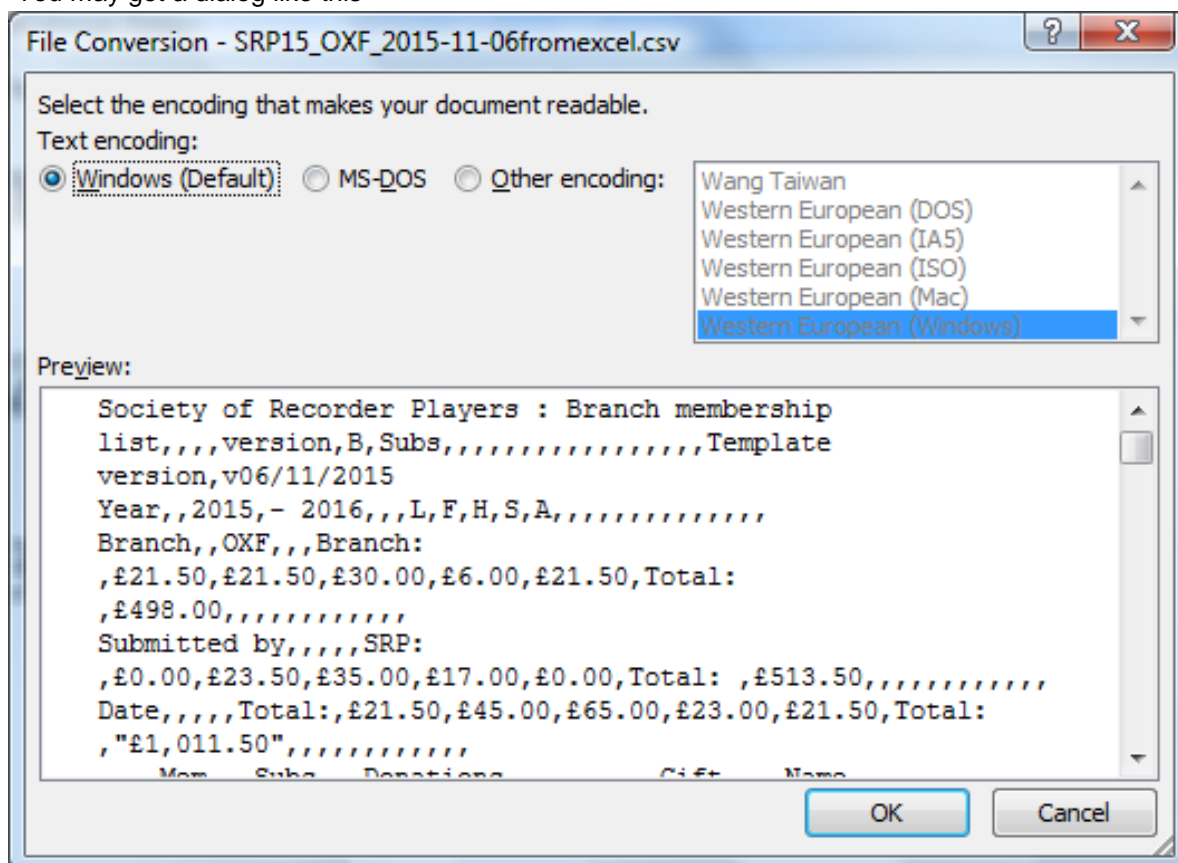
5. Close the mailmerge document. You can save it if you wish. If so you will be prompted next time you open it: click **Yes**. You can then sometimes skip the **Select Recipients** step if you are using a spreadsheet of the same name as previously.

² Attachment seems to work with most mail programs. You can also use HTML if you are using Outlook as your mail program. The disadvantage of Attachment is that there is no email body, so you need to make sure the subject line is clear.

Word 2003/XP

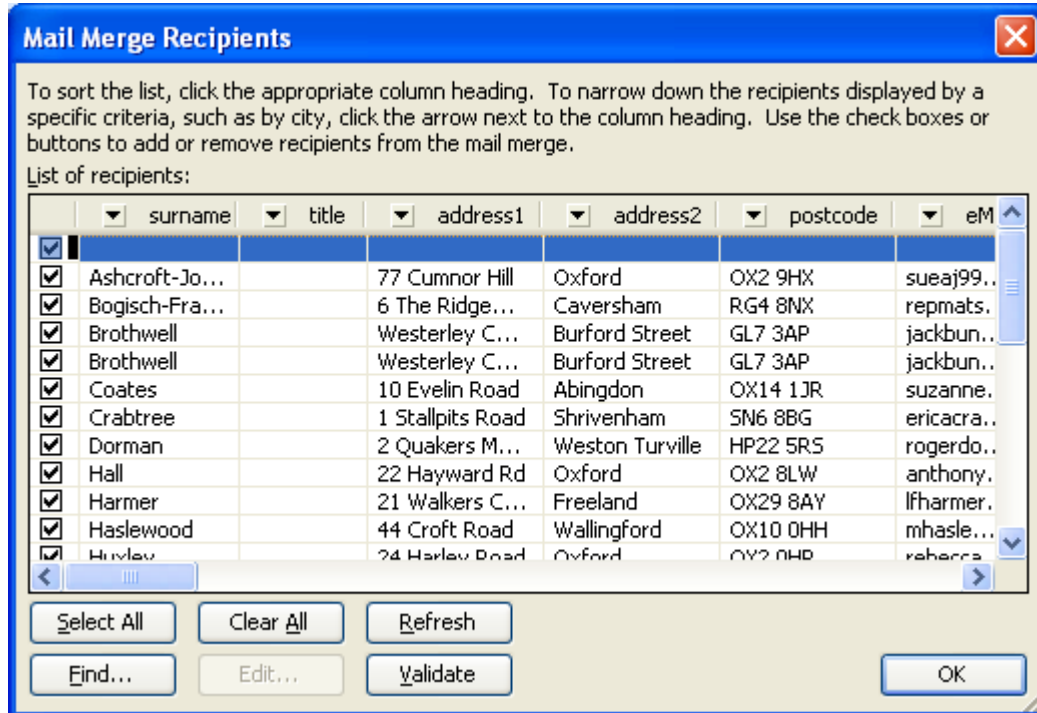
1. Open the mail merge document.
2. In the **Tools** menu, choose **Letters and Mailings**, and click **Mail Merge...** This will open a Mail merge task pane.
3. In **Step1 Select Document Type**, choose either **E-mail messages** or, for printed forms, **Letters**.
4. In **Step 2 Select Starting Document**, choose **Use the current document**
5. In **Step 3 Select Recipients**, choose **Use an existing list** and click **Browse**
6. Find the spreadsheet you have saved.

You may get a dialog like this



Make sure that **Windows(Default)** is selected and click OK.

7. You will then get a dialog listing the members.



You can just click OK, or select the forms you want.

8. Go to **Step 6 Complete the Merge**. Click either
- Electronic Mail...** In the dialog, make sure the **To:** is set to **eMail** and enter a **Subject Line** for your email. Set the **Mail Format** to **Attachment**, and click **OK** (see footnote 2).
 - Edit individual letters...** to get a document containing all or a range of forms. You will get a dialog asking which forms you want. Click **OK** to generate the document. You may get a warning that **Record ... was an empty record** Ignore it by clicking **OK**.
9. Close the mailmerge document. I recommend not saving changes.

Word for Mac

- In the Tools menu, In the **Tools** menu, click **Mail Merge....** This brings up a **Mail Merge** dialog with 6 sections.
- In **1** choose **Create New**, then **Form Letters** where the main document name will already be filled in.
- In **2 Data Source**, click **Get Data** and then **Open Data Source**
- Browse to find your spreadsheet. In **Enable** choose **All Files**
- The placeholders will appear automatically in **3**. You can filter the results in **4**, and preview them in **5** by clicking on the left hand **ABC** button before completing the merger in **6**.
- Complete Merge** gives you the choice of printing, saving as a document or sending e-mails to each member (provided you have **Outlook** enabled as your default e-mail reader). If you choose e-mail, in the dialog, make sure the **To:** is set to **eMail** and enter a **Subject Line** for your email. Set **Send As:** to **HTML**, then click **Mail Merge To Outbox**.