

MAIL-MERGE TEMPLATES

Mail-merge templates are specifically used for mail-merge documents. These are documents which are used to send out the same letter to a group of people.

- To create a mail-merge document click **FILE, NEW, TEMPLATE**
 - On the menu bar (3rd down), click on the icon which says **INSERT MAILMERGE FIELD**
 - Make sure **Current Source** is chosen in the **Data Origin Box**
 - The Item selector will then appear. Chose which item you want to insert into your document
 - When found click **ok**
 - This will intergrate the mailmerge field into your template
 - Once you have created the template to your satisfaction, you click on **FILE, SAVE AS**, (name your document) and click **SAVE**
 - Again while creating the document, you can check its progress periodically to ensure all fields chosen will extract the appropriate information.
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- Your mailmerge document can only be executed using the Action plan
 - Go to acion plan and chose the group of people you want to send the identical letter to
 - Click on Mail merge (in the lower Rt of the screen) The letter will then appear
 - The mail-merge letter can then be printed off