Mailing Lists (1)

Developing a mailing list will allow you to store and sort all your clients, contacts and volunteer details such as names, addresses, tel numbers etc. You will also be able to Merge them into documents such as letters, labels and other types of reports.

There are two main ways to set up mailing lists

- WORD – Word Processor
- Access – Database

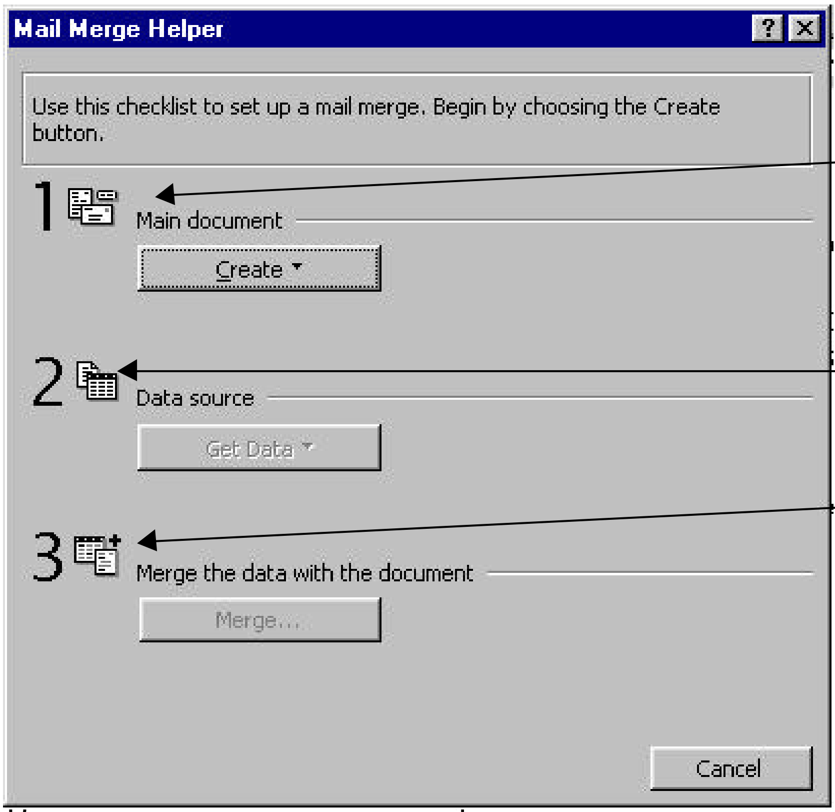
When to use WORD and not Access

- The mailing list is just for names and address and other contact information
- You don't have more than say 50-100 records (i.e. people or contacts)
- You don't need select only portions of the information e.g. only those that live in Rochdale (you can do what are called Queries in WORD, however Access is much better at them)
- You don't want to link information e.g. link volunteers with projects

In other words, if all you want to do is keep a list of your contacts and run of letters and labels then use WORD, for anything more complicated, think about doing an Access Database.

Setting up a database (Mail Merge) in WORD

Creating a Data Source
1. Click on **Tools** then **Mail Merge**
2. You will see the dialogue box below. There are three steps to mail merging



❶ create a main document e.g. mailing labels, a letter you want to personalise. Even if you want to just create your list you still have to create a Main document

❷ create or open a Data Source, this is the list of names and addresses

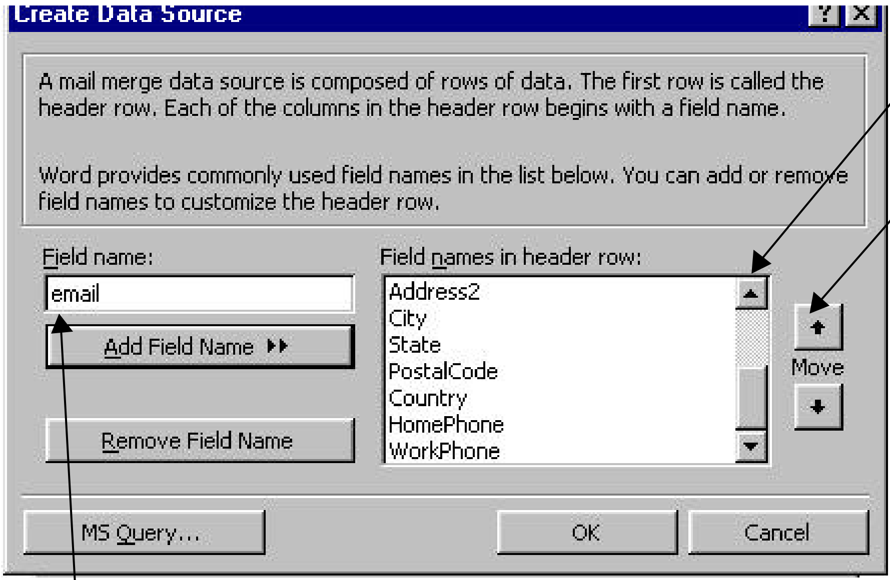
❸ bring information from your data source (list of names and addresses) into your Main document, your letter or labels, so you have one label or one letter per person.

3. First of all we are going to create a Data Source from scratch
Click on **Create** next to Main document, click on the type of document you want to produce e.g. **form letter**. If you don't have any ideas on what documents you will be producing, click any option, then **click New Main Document**

4. You can now click the second stage **Get Data** button

5. Now click **Create Data Source**

6. You'll see the following dialogue box



❶ Scroll down here and check the field names available. If there is one you don't want e.g. State, click on it and click **Remove Field Names** button (bottom left).

❷ Use these keys to change where the field names appear on the list, e.g. if you want to have Work Phon above HomePhone, click on WorkPhone and click the arrow up button once

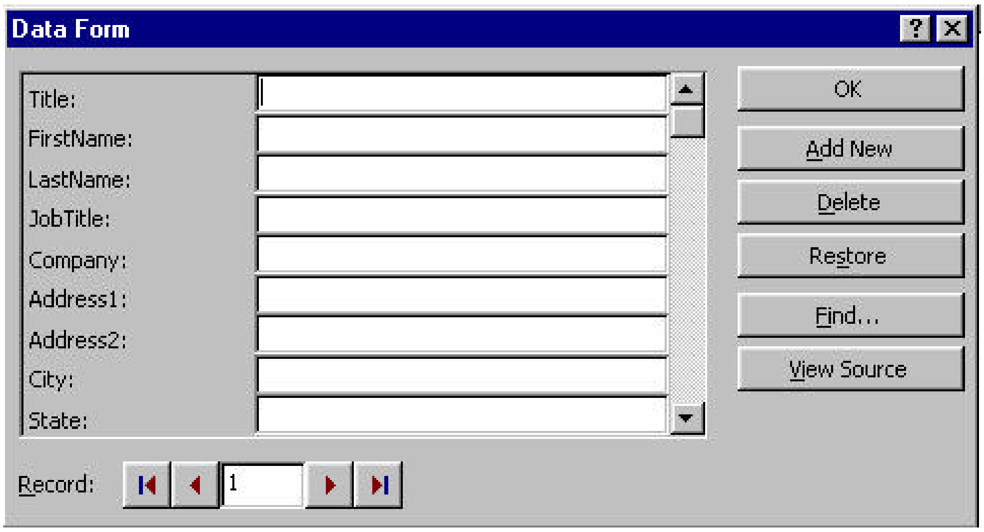
❸ Add fields that you want e.g. email or website, by typing in the name of the field (you can't have spaces or hyphens) and click **Add Field Name button**. The field will be added to the bottom of the list, use the up and down arrows to move the field to where you want it on the list.

7. Use the instructions above to create the fields (headings) that you want and put them in the order that you want. Once you are happy click **OK**.

8. A Save As box will now appear, save your mailing list in the appropriate folder giving it a useful name by which you can identify it. Click **Save.**

9. Then click **Edit Data Source**

10. You will now see the following screen. The list of the field names are on the left. Where you type your records, i.e. your contacts in the middle and the control buttons on the right and down on the bottom left.



11. Enter in your first contacts **Title** e.g. Ms, Mr, Mrs and press the **Tab** key to move to the next field

12. Once all the fields are complete, click **Add New**

13. Enter the second. To move between different records click on the arrows at the bottom left of the screen to go forward or backwards through your records.

14. Use the **Delete** button to delete a whole record – remember if you press delete it will delete everything about a person, use **Restore** to bring the record back.

15. Click **OK** when you've finished.

You will now have a list of contacts stored in a Data Source File. Actually all the data is stored in a Table and can be viewed by clicking on the View Source button in the Data Form.

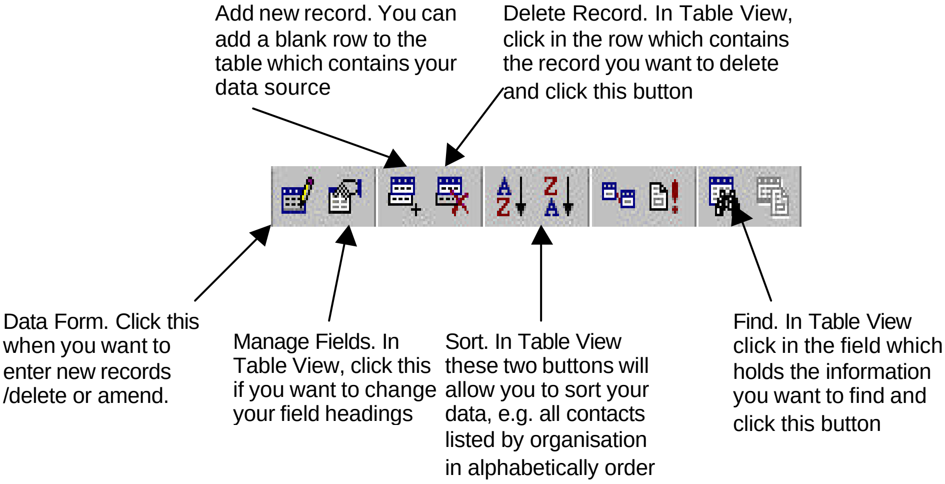
Editing and Adding to a Data Source

As you get new contacts/volunteers/clients you will want to add them to your existing data source.

1. Open up the Data Source as a normal word processing document, i.e. click **File** then **Open**, go to the folder where the data source is stored, click on it once and then click **Open**

2. You now need to make sure the Database Toolbar is visible. Click **View**, **Toolbars**, and make sure there is a tick next to database, if not on **Database**

3. This Toolbar will now be displayed on the screen



4. Click on the **Data Form** button. You will now see the same form you saw when you first created your Data Source. From here you can add new records, amend and delete records.

5. If you prefer to work directly with the table of data you can use the toolbar to do all the things that you can do from Data Form View.

Creating Mailing Labels using your Mailing List (Data Source)

1. Click **Tools** and then **Mail Merge…..**

2. In Step 1 Main Document click **Create**, then select **Mailing Labels**.

3. Click on **New Document**.

4. In Step 2 Data Source click **Get Data**, then **Open Data Source**, go to the folder where your Database (Mailing List) is stored, click on it once and click **Open**.

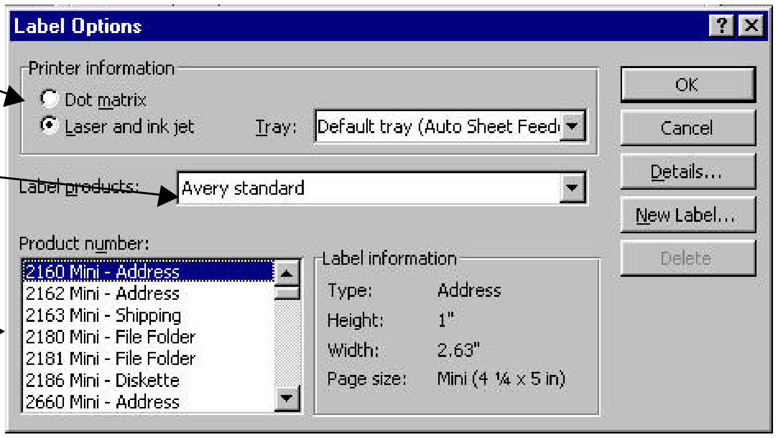
5. A message will appear, saying that WORD needs to set up your main document i.e. how your labels will look. Click **Set Up Main Document**.

6. The box below will appear.

❶ Click on the type of printer you have.

❷ Select the Label products, usually Avery standard or Avery A4 or A5 sizes is fine. Most labels have an Avery code

❸ Select the type of Labels you have. Look on your box for the appropriate code

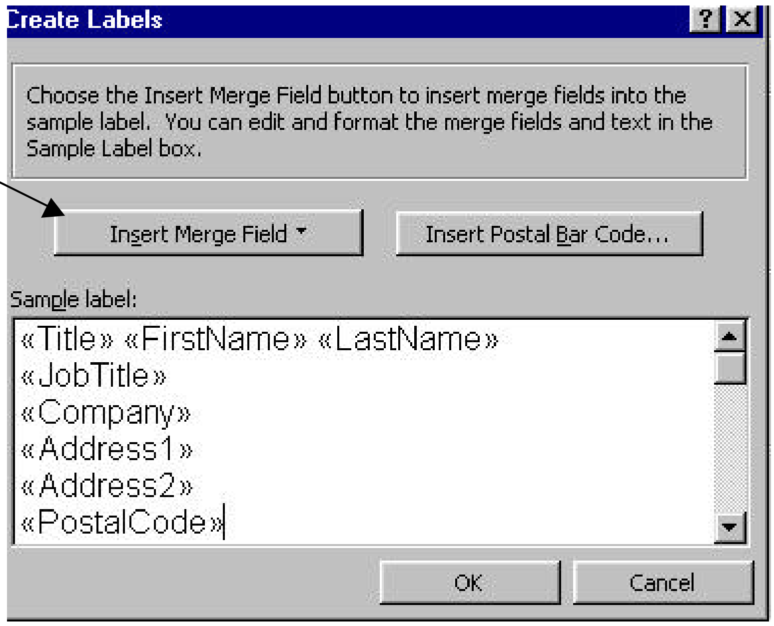


7. Make your selections and then click **OK**.

8. The Create Labels box will appear. This allows you to insert the information you want to include (field names) in the labels.

❶ Click on Insert Merge Field. You will see a list of all your field names. Click for e.g. Title, press the Space bar and repeat to insert FirstName. When you have completed a line press Enter.

❷ Complete until your 'sample' label is how you want it.



9. Click **OK**

10. Click on Stage 3 **Merge**

11. Check the settings, usually the existing (default) settings are fine.

12. Click **Merge**. Your Labels will now be displayed in a new WORD document which you can **Print**. You can also **Save** the document if you are to re-use it regularly, remember though it will not contain any amendments or additions made after you created the labels.

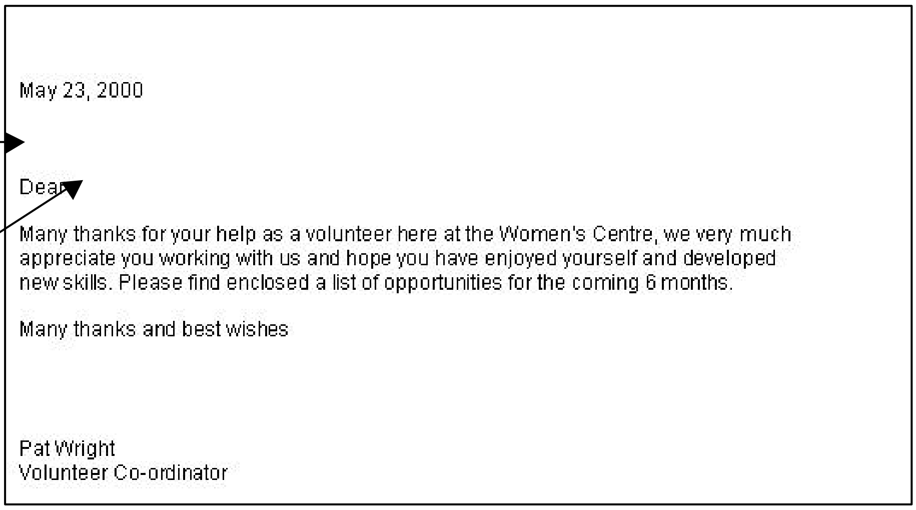
Creating a Form Letter using your Mailing List (Data Source)

You can personalise mass mailings using the Mail Merge function.

1. Type the letter/memo/document without any individual information in it e.g. below

Leave three blank lines, one for above the address, one for the address, one for below the address

Leave the name blank but don't forget to type a space after Dear



May 23, 2000

Dear

Many thanks for your help as a volunteer here at the Women's Centre, we very much appreciate you working with us and hope you have enjoyed yourself and developed new skills. Please find enclosed a list of opportunities for the coming 6 months.

Many thanks and best wishes

Pat Wright
Volunteer Co-ordinator

2. Go to **Tools**, **Mail Merge….**

3. Click on Step 1, Main Document and click on **Create**, then click **Active Window**

4. Click on **Get Data Source** from Step 2, click on **Open Data Source**

5. Go to the folder where the Data Source is stored, select it and click **Open**

6. A message will appear which says, Word found no merge fields in your document….. click **Edit Main Document**

7. The tool bar (below) should now be showing at the top of the screen

Merge to new document button

8. Place your cursor where you want to insert a field

9. Click the **Insert Merge Field** and click on the field you want to insert e.g. Title. Press the space bar and insert your second field e.g. first name

10. Continue inserting fields, and pressing **Enter** when required

11. When all merge fields are in your document, click on **the Merge to new document** button.

12. A new document will be created with each of the individuals on your mailing list having their own individual personalised letter. You can save the Mail Merge and your Form Letter separately for future use if necessary.