

Create Membership Renewal Letters

We have an automated process that will create a list of memberships that are due to expire next month. This process runs at 1:00am on the first day of each month and creates an Excel spreadsheet. This spreadsheet contains all the information needed to run a Microsoft Word mail-merge which will create the renewal letters. Following are the steps needed to process the renewal letters.

On the first business day of each month, an email will be sent to office@ocws.org with the subject line, OCWS Monthly Report for Jul 2016, where Jul 2016 represents the expiring month and generated on June 1st. Within this email will be an Excel attachment named, `MembersExpiring_2016-07_Reported-2016-06-01.xlsx`. Save this Excel spreadsheet on the root of your C drive (C\).


Also on C:\ is a Microsoft Word mail-merge document, `RenewalNoticeMailMergeTemplate.docx`. Double-click on this document to load it into Word. It should now look like this:

Calibri (Body) RenewalNoticeMailMergeTemplate.docx - Word Sign in

File Home Insert Design Layout References Mailings Review View Developer Add-ins Tell me Share

Envelopes Start Mail Merge Select Recipients Edit Recipient List Create Start Mail Merge

Labels Highlight Merge Fields Write & Insert Fields Address Block Greeting Line Insert Merge Field Preview Results Find Recipient Check for Errors Preview Results Finish & Merge Finish



Orange County Wine Society, Inc
P.O. BOX 11053
COSTA MESA, CA 92627
(714) 708-1636 FAX (714) 546-5002
ocws.org

Membership Dues Renewal Notice

June 1, 2016

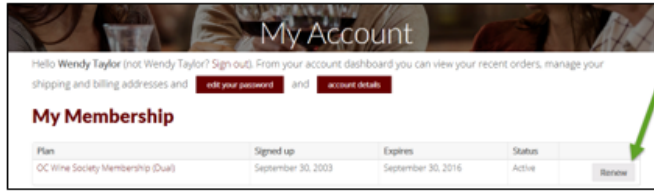
«AddressBlock»

«GreetingLine»

According to our records, your membership in the Orange County Wine Society will expire on «Membership_Expiration_Date». Once your membership is expired you will not be able to sign up for any OCWS activities or events until you renew your membership.

Annual dues are \$40 for a single membership or \$60 for a dual membership.

We strongly encourage you to renew your membership online. It is the fastest and easiest way of renewing. To renew online, go to ocws.org, login with your username («User_Login») and password then click the **Renew** button:



When you renew online, we encourage you to review and update your member profile. From the display above, just click on **account details** and update as necessary.

If you have already renewed your membership, please disregard this notice. If you do not plan to renew we would appreciate your feedback by letting us know the reason you are not renewing.

Thank you,

Brian McDonald

Brian McDonald
Director - Membership Chair
brian@ocws.org

Notice the <<AddressBlock>> and <<GreetingLine>> text. These are the mail-merge fields which will be filled in soon.

Calibri (Body) RenewalNoticeMailMergeTemplate.docx Sign in

File Home Insert Design Layout References Mailings Review View Developer Add-ins Tell

Start Mail Merge Letters E-mail Messages Envelopes... Labels... Directory Normal Word Document Step-by-Step Mail Merge Wizard...

Address Block Greeting Line Insert Merge Field Insert Fields Preview Results Find Recipient Check for Errors Preview Results

County Wine Society, Inc
P.O. BOX 1000
COSTA MESA, CA 92627
714-441-1000 FAX (714) 546-5002
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Membership Dues Renewal Notice

June 1, 2016

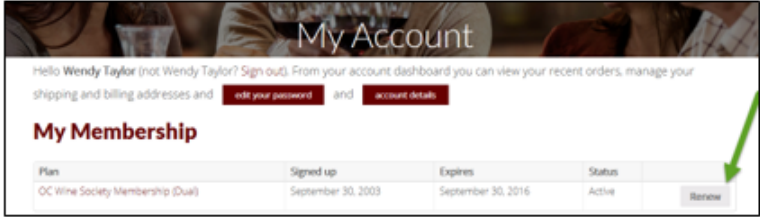
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Plan	Signed up	Expires	Status	
OC Wine Society Membership (Dual)	September 30, 2013	September 30, 2016	Active	Renew

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Thank you,

Brian McDonald

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Section: 1 Page 1 of 1 0 of 170 words

Click on Mailings/Start Mail Merge (just the arrow)/Step-by-Step Mail Merge Wizard....

Calibri (Body) RenewalNoticeMailMergeTemplate.docx - Word Sign in

File Home Insert Design Layout References Mailings Review View Developer Add-ins Tell me Share

Envelopes Labels Create Start Mail Merge Select Recipients Edit Recipient List Start Mail Merge

Address Block Greeting Line Insert Merge Field Highlight Merge Fields Write & Insert Fields

Preview Results Find Recipient Check for Errors Preview Results

Finish & Merge Finish

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Membership Dues Renewal Notice

June 1, 2016

«AddressBlock»

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My Account
Hello Wendy Taylor (not Wendy Taylor)! Sign-out From your account dashboard you can view your recent orders, manage your shipping and billing addresses and [edit your password](#) and [account details](#).

My Membership

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OC Wine Society Membership (Dual)	September 30, 2003	September 30, 2016	Active	Renew

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Thank you,
Brian McDonald
Brian McDonald
Director - Membership Chair
brian@ocws.org

Mail Merge

Select document type
What type of document are you working on?

- ☒ Letters
- ☐ E-mail messages
- ☐ Envelopes
- ☐ Labels
- ☐ Directory

Letters
Send letters to a group of people. You can personalize the letter that each person receives.
Click Next to continue.

Step 1 of 6
Next: Starting document

Section: 1 Page 1 of 1 0 of 170 words 70%

Ensure Letters is selected and then click on Next: Starting document.



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June 1, 2016

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Thank you,

Brian McDonald

Brian McDonald
Director - Membership Chair
brian@ocws.org

Mail Merge

Select starting document
How do you want to set up your letters?

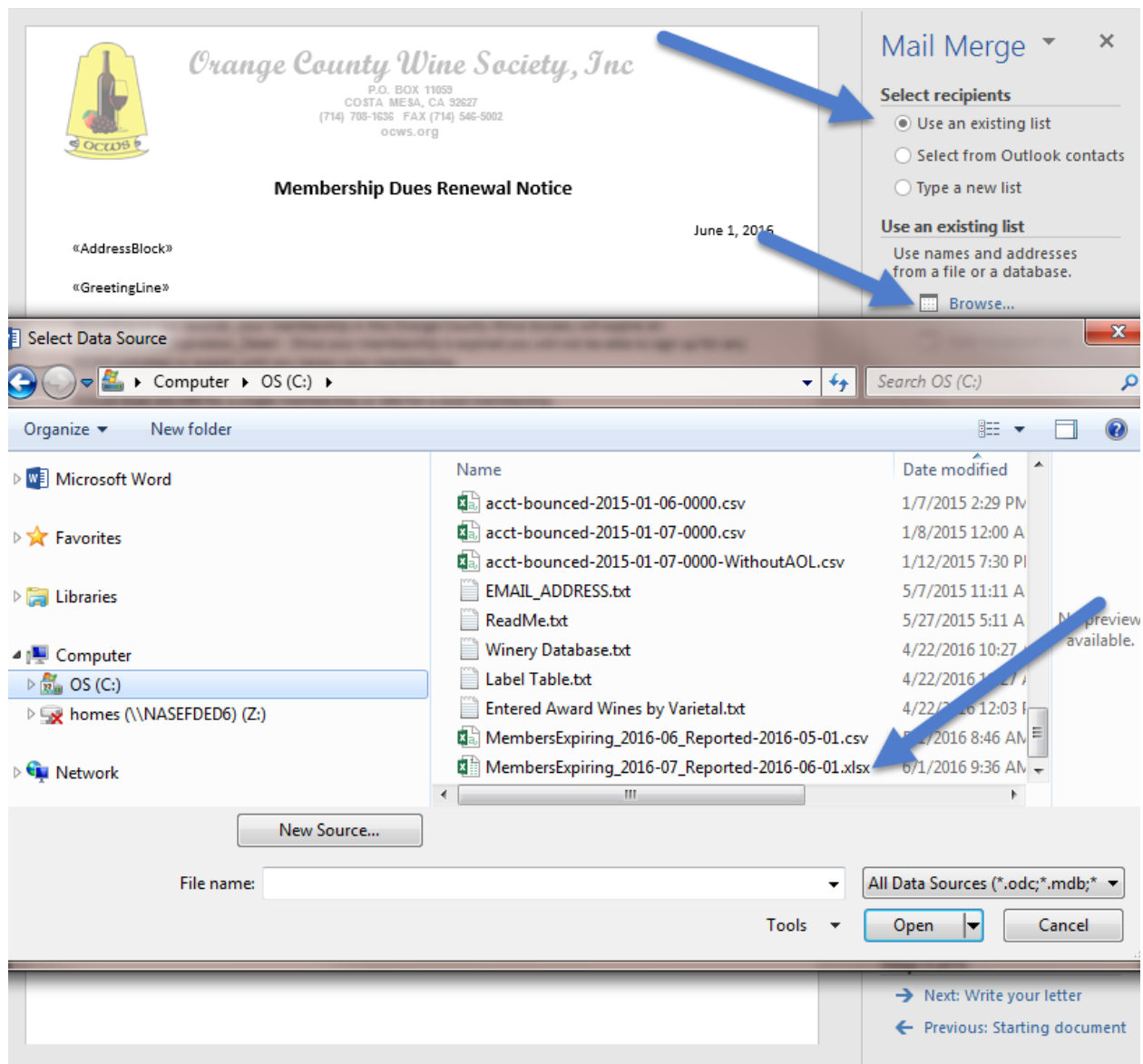
- ☒ Use the current document
- ☐ Start from a template
- ☐ Start from existing document

Use the current document
Start from the document shown here and use the Mail Merge wizard to add recipient information.

Step 2 of 6

- Next: Select recipients
- Previous: Select document ty

Ensure Use the current document is selected, then click on Next: Select recipients.



Ensure Use an existing list is selected. Then click on Browse... The file explorer will pop-up. Click on the Excel Spreadsheet that you saved earlier. In this example, you would select `MembersExpiring_2016-07_Reported-2016-06-01.xlsx`.

«AddressBlock»

June 1, 2016

«GreetingLine»

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We str
To renew
button:

Select Table

Name	Description	Modified	Created	Type
MembersExpiring_2016-07_Report\$		6/1/2016 9:36:06 AM	6/1/2016 9:36:06 AM	TABLE

☒ First row of data contains column headers

OK Cancel


When y
above,

If you have already renewed your membership, please disregard this notice. If you do not plan to renew we would appreciate your feedback by letting us know the reason you are not renewing.


Use an existing list

Use names and addresses from a file or a database.

 Browse...

 Edit recipient list...

Click on the OK button.

 **Orange County Wine Society, Inc**
P.O. BOX 11053
COSTA MESA, CA 92627

Mail Merge

Select recipients

Mail Merge Recipients

This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

Data Source		Last Name	First Name	Street Address	City
MembersExpiring...	<input checked="" type="checkbox"/>	Anderson	Roger	6181 Country View Drive	Yorba Linda
MembersExpiring...	<input checked="" type="checkbox"/>	Brown	David	4331 E Lamp Post Way	Anaheim Hills
MembersExpiring...	<input checked="" type="checkbox"/>	Jones	Tom	1002 E. 20th Street	Santa Ana
MembersExpiring...	<input checked="" type="checkbox"/>	Knudson	Doug	1755 Chapel Hill Dr.	Walnut
MembersExpiring...	<input checked="" type="checkbox"/>	O'Connell	Hugh	29300 N 120th Ln	Peoria
MembersExpiring...	<input checked="" type="checkbox"/>	Pancheri	Chuck	22606 San Joaquin Dr. W.	Canyon Lake
MembersExpiring...	<input checked="" type="checkbox"/>	Walser	David	391 South Henning Way	Anaheim
MembersExpiring...	<input checked="" type="checkbox"/>	Annan	William	10961 Lake Curt Road	Santa Ana

Data Source: MembersExpiring_2016-07_R

Refine recipient list

[Sort...](#)
[Filter...](#)
[Find duplicates...](#)
[Find recipient...](#)
[Validate addresses...](#)

Edit... Refresh

OK

When you
above, jus

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Click on the OK button.

Orange County Wine Society, Inc
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Membership Dues Renewal Notice

June 1, 2016

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My Account

hello Wendy Taylor (not Wendy Taylor) Sign-in! From your account dashboard you can view your recent orders, manage your shipping and billing addresses and [add your payment](#) and [account details](#)

My Membership

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OC Wine Society Membership (Dual)	September 30, 2013	September 30, 2016	Active	Renew

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Thank you,
Brian McDonald
Brian McDonald
Director - Membership Chair
brian@ocws.org

Mail Merge

Select recipients

☒ Use an existing list
☐ Select from Outlook contacts
☐ Type a new list

Use an existing list


Currently, your recipients are selected from:
[MembersExpiring_2016-07_Reporte\$] in "MembersEx"

[Select a different list...](#)
[Edit recipient list...](#)

Step 3 of 6

→ [Next: Write your letter](#)
← [Previous: Starting document](#)

Click on Next: Write your letter.



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P.O. BOX 11659
COSTA MESA, CA 92627
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Membership Dues Renewal Notice

June 1, 2016

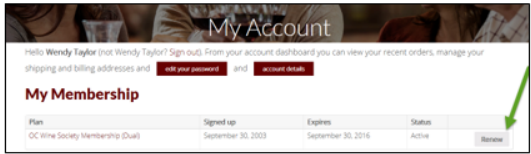
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Thank you,

Brian McDonald

Brian McDonald
Director - Membership Chair
brian@ocws.org

Mail Merge

Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- Address block...
- Greeting line...
- Electronic postage...
- More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

Step 4 of 6

→ Next: Preview your letters

← Previous: Select recipients

You only need to click on Next: Preview your letters.



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Membership Dues Renewal Notice

June 1, 2016

Roger Anderson
6181 Country View Drive
Yorba Linda, CA 92886

Dear Roger Anderson:

According to our records, your membership in the Orange County Wine Society will expire on July 31, 2016. Once your membership is expired you will not be able to sign up for any OCWS activities or events until you renew your membership.

Annual dues are \$40 for a single membership or \$60 for a dual membership.

We strongly encourage you to renew your membership online. It is the fastest and easiest way of renewing. To renew online, go to ocws.org, login with your username (cjpma@msn.com) and password then click the **Renew** button:

My Account

Hello Wendy Taylor (not Wendy Taylor? Sign out). From your account dashboard you can view your recent orders, manage your shipping and billing addresses and [add your payment](#) and [account details](#).

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Thank you,
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Brian McDonald
Director - Membership Chair
brian@ocws.org

Mail Merge

Preview your letters

One of the merged letters is previewed here. To preview another letter, click one of the following:

Recipient 1

[Find a recipient...](#)

Make changes

You can also change your recipient list:

[Edit recipient list...](#)

When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments.

Step 5 of 6

[Next: Complete the merge](#)
[Previous: Write your letter](#)

This shows the first letter in the batch. Review the mailing address, date of letter, salutation, expiration date, and login ID for any obvious formatting errors. If you find any errors, contact the OCWS webmaster. If you would like to preview more letters, you can click on the >> button. When you are satisfied, click on Next: Complete the merge.

Orange County Wine Society, Inc.
P.O. BOX 11099
COSTA MESA, CA 92627
(714) 785-1636 FAX (714) 546-5002
ocws.org

Membership Dues Renewal Notice

June 1, 2016

Roger Anderson
6181 Country View Drive
Yorba Linda, CA 92886

Dear Roger Anderson:

According to our records, your membership in the Orange County Wine Society is expired. Once your membership is expired you will not be able to sign up for a new membership or renew your membership.

Annual dues are \$40 for a single membership or \$60 for a dual membership.

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Brian McDonald
Director - Membership Chair
brian@ocws.org

Mail Merge

Complete the merge

Mail Merge is ready to produce your letters.

To personalize your letters, click "Edit Individual Letters." This will open a new document with your merged letters. To make changes to all the letters, switch back to the original document.

Merge

[Print...](#)

[Edit individual letters...](#)

Step 6 of 6

[Previous: Preview your letters](#)

Click on Edit individual letters. The Merge to New Document pop-up will appear; select All and OK.

A new instance of Word will pop up which will contain every letter to be printed. Simply print all pages of this document. They must be printed in **color**.

When you close the Word template file, do not perform a Save.