# 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 <u>office@ocws.org</u> with the subject line, <u>OCWS Monthly Report for Jul 2016</u>, where Jul 2016 represents the expiring month and generated on June 1<sup>st</sup>. Within this email will be an Excel attachment named, <u>MembersExpiring\_2016-07\_Reported-2016-06-01.xlsx</u>. 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:



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



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

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



Ensure <u>Use an existing list</u> is selected. Then click on <u>Browse...</u> The file explorer will pop-up. Click on the Excel Spreadsheet that you saved earlier. In this example, you would select <u>MembersExpiring\_2016-07\_Reported-2016-06-01.xlsx</u>.

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Brian McDonald Director - Membership Chair brian@ocws.org	
	Step 3 of 6
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Click on Next: Write your letter.



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

Crange County Wine Society, Inc PO. BOX 11059 COSTA MESA. CA 25257 (714) 708-1595-5002 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 >>
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Director - Membership Chair	
niau@orws.org	Step 5 of 6
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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 <u>Next: Complete the merge</u>.

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

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 **COOP**.

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