# 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, <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, `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:

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

Calibri (Body)

RenewalNoticeMailMergeTemplate.docx - Word    Sign in

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

Envelopes    Start Mail Merge ▾        Address Block            Find Recipient
Labels                                Greeting Line        Preview    Check for Errors
Create                                sert Merge Field    Results

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

& Insert Fields    Preview Results

unty Wine Society, Inc
P.O. BOX
COSTA       CA 92627
FAX (714) 546-5002
ocws.org
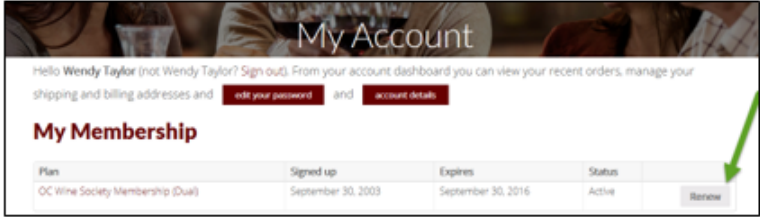
**Membership Dues Renewal Notice**

June 1, 2016
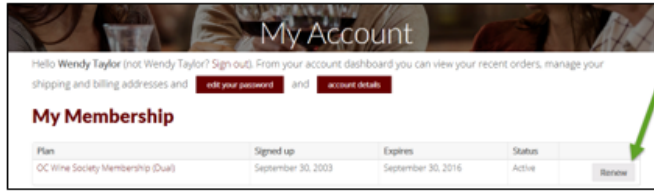
«AddressBlock»

«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:

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**

| Plan | Signed up | Expires | Status | |
|------|-----------|---------|--------|---|
| OC Wine Society Membership (Dual) | September 30, 2003 | September 30, 2016 | Active | Renew |

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

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....



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

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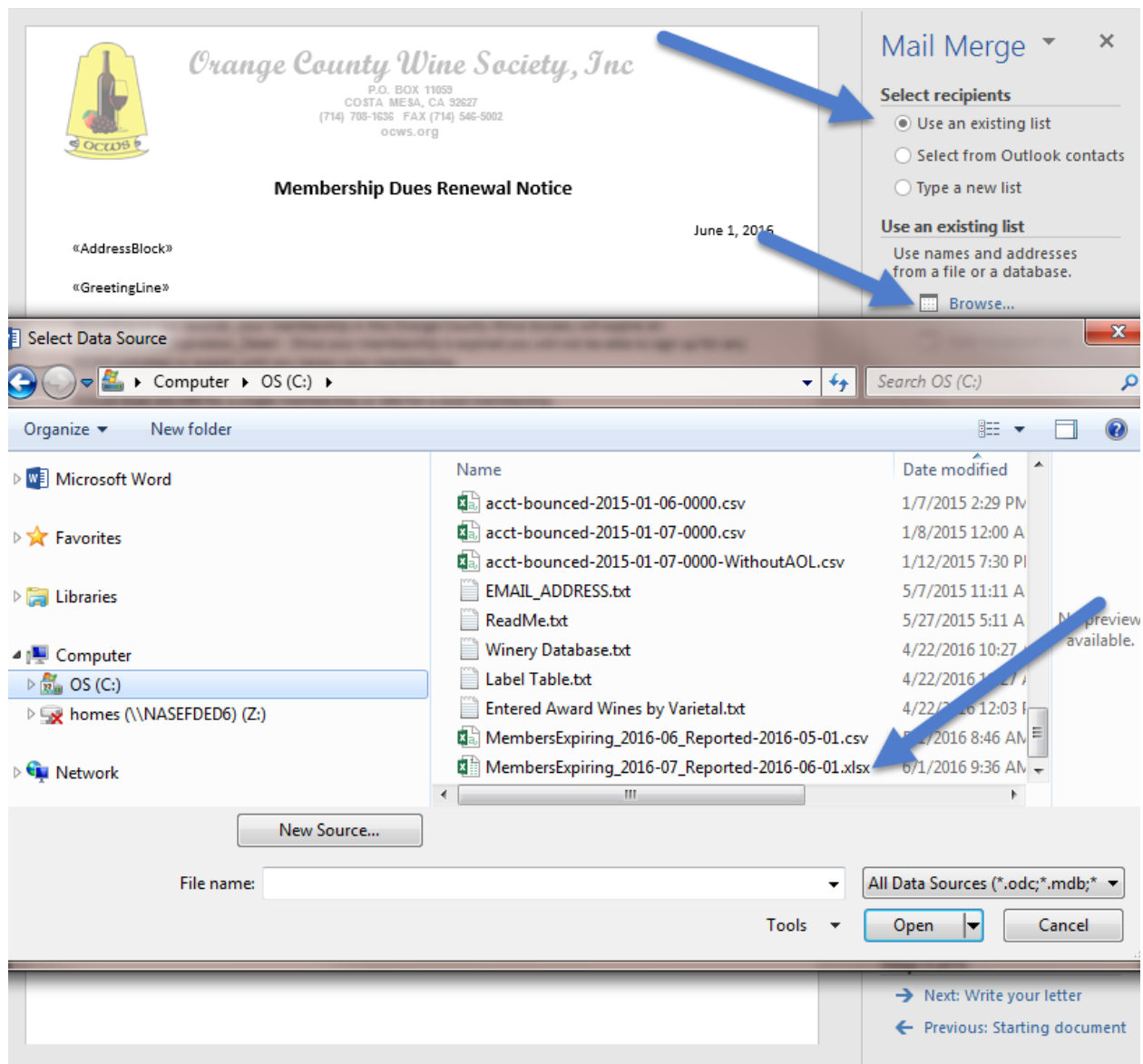
Ensure Use an existing list is selected. Then click on Browse… The file explorer will pop-up. Click on the Excel Spreadsheet that you saved earlier. In this example, you would select
`MembersExpiring_2016-07_Reported-2016-06-01.xlsx`.

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.

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**Use an existing list**

Use names and addresses from a file or a database.

Browse...

Edit recipient list...

---

**Select Table**

| Name | | Description | Modified | Created | Type | |
|------|---|-------------|----------|---------|------|---|
| 'MembersExpiring_2016-07_Reporte$' | | | 6/1/2016 9:36:06 AM | 6/1/2016 9:36:06 AM | TABLE | |

☑ First row of data contains column headers

OK    Cancel

---

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.
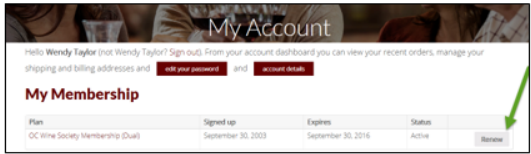
Click on the OK button.

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*Orange County Wine Society, Inc*
P.O. BOX 11059
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... | ☑ | Anderson | Roger | 6181 Country View Drive | Yorba Linda |
| MembersExpiring... | ☑ | Brown | David | 4331 E Lamp Post Way | Anaheim Hills |
| MembersExpiring... | ☑ | Jones | Tom | 1002 E. 20th Street | Santa Ana |
| MembersExpiring... | ☑ | Knudson | Doug | 1755 Chapel Hill Dr. | Walnut |
| MembersExpiring... | ☑ | O'Connell | Hugh | 29300 N 120th Ln | Peoria |
| MembersExpiring... | ☑ | Pancheri | Chuck | 22606 San Joaquin Dr. W. | Canyon Lake |
| MembersExpiring... | ☑ | Walser | David | 391 South Henning Way | Anaheim |
| MembersExpiring... | ☑ | 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

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Click on the OK button.



Click on <u>Next: Write your letter</u>.

You only need to click on <u>Next: Preview your letters</u>.

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.

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.