

# TRUST SERVICE TRAINING - LEVEL 3

## SESSION 10.1

### MAIL MERGE

It is possible to create a mail merge from the Trust Service. These instructions are written for Word 2003, there may be some variation in older or newer versions of Word

#### Preparation

Check you have a file called TMSDATA.CSV in the TMS file. If not, email [Krogers@cch.co.nz](mailto:Krogers@cch.co.nz) to request a copy.

#### Four Steps to create a Mail Merge

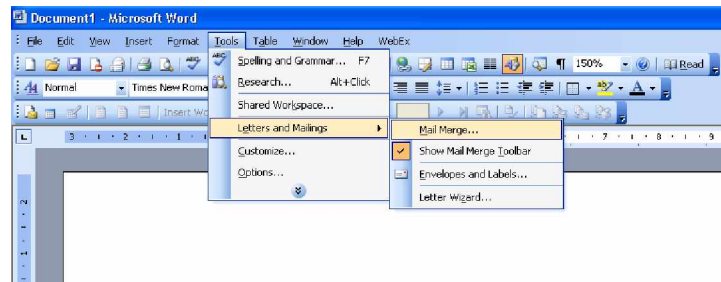
1. Create the Letter Template in Word
2. Link the Letter Template to the TMSDATA.CSV file
3. Insert the Merge Fields
4. Run the Mail Merge from the Trust Service

#### Step 1. Create the letter in Word

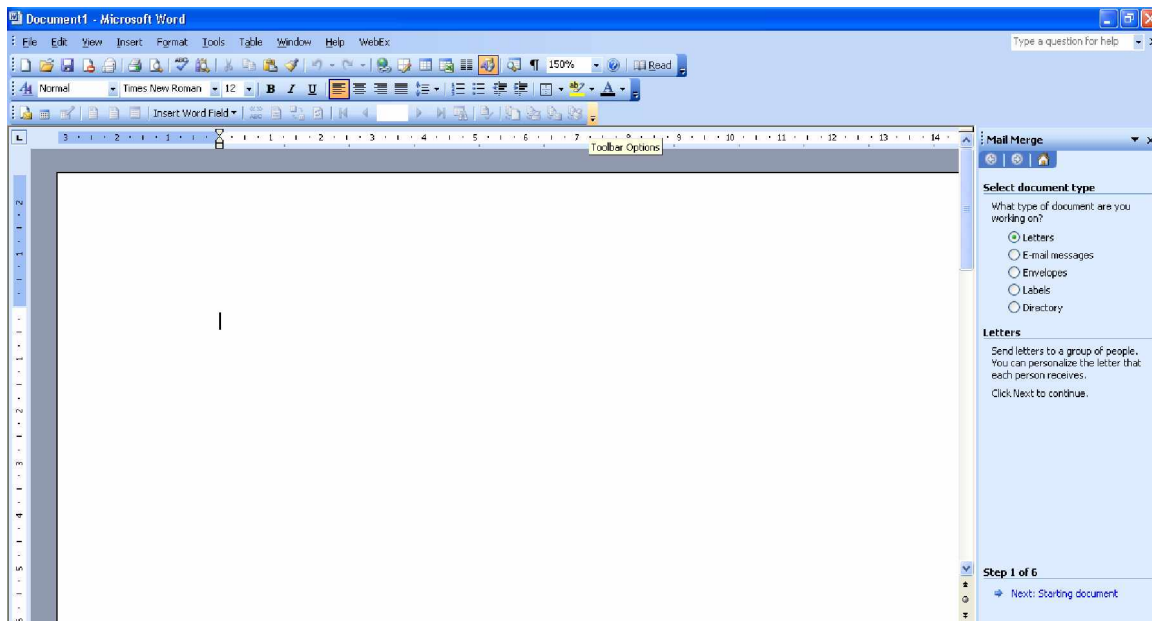
Open Word.

Open a New Word Document

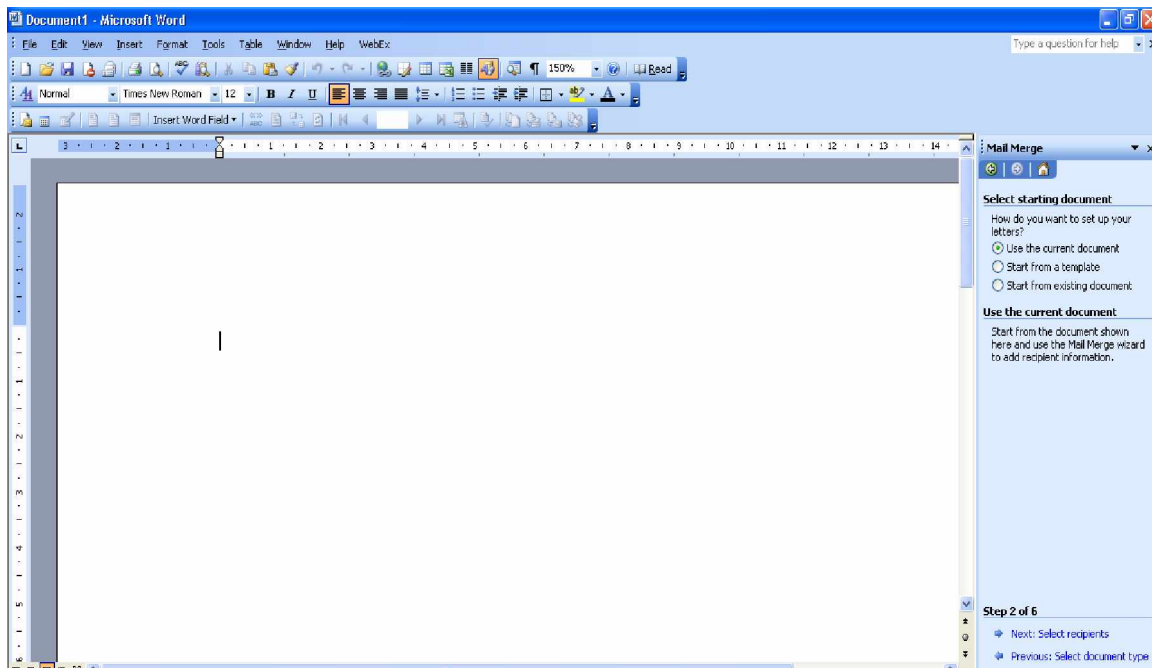
Select Tools/Letters and Mailings/Mail Merge



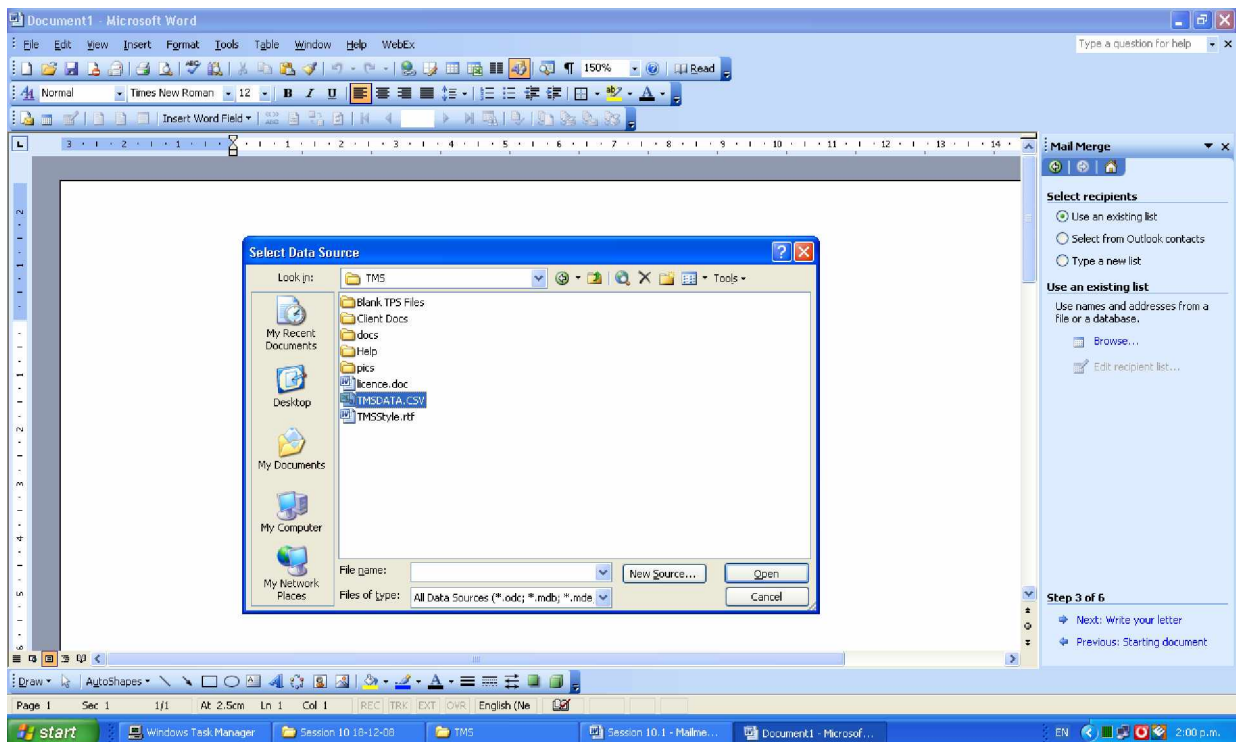
You will now see the Mail Merge window on the right hand side of your screen



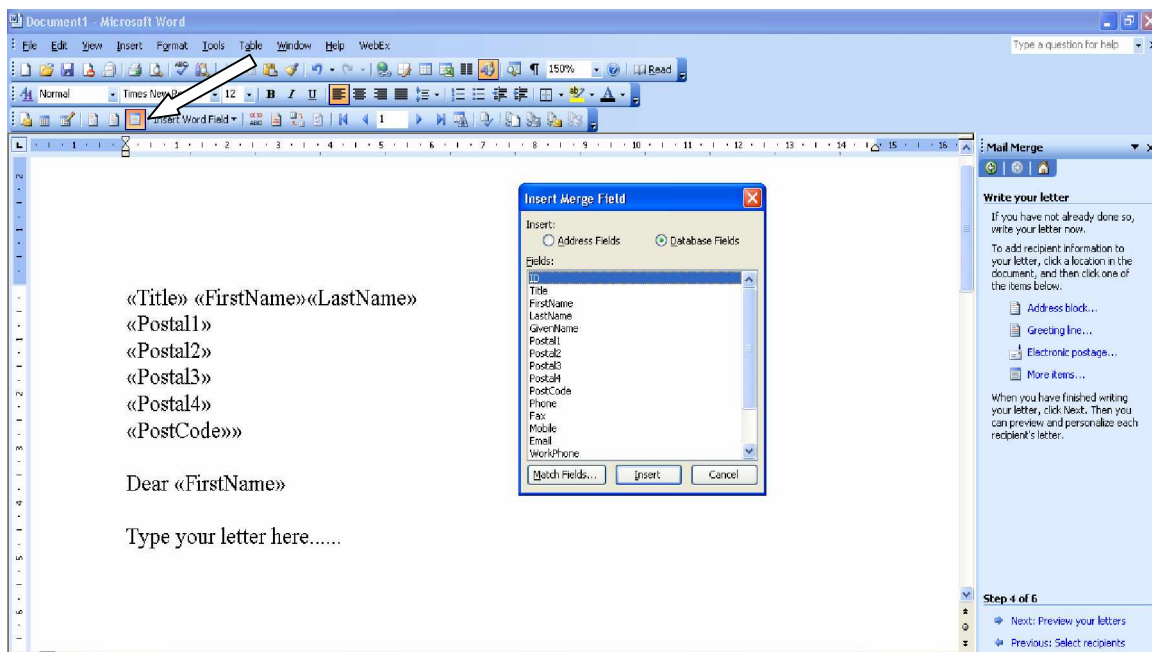
Select Document Type - 'Letter' & move to next step



Select starting document - 'Use the current document' & move to next step

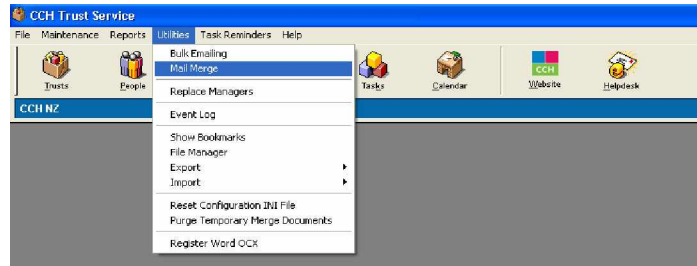


Select Recipients - 'Use an existing list'  
 Browse for existing list, in TMS folder & select TMSDATA.CSV then move to next step

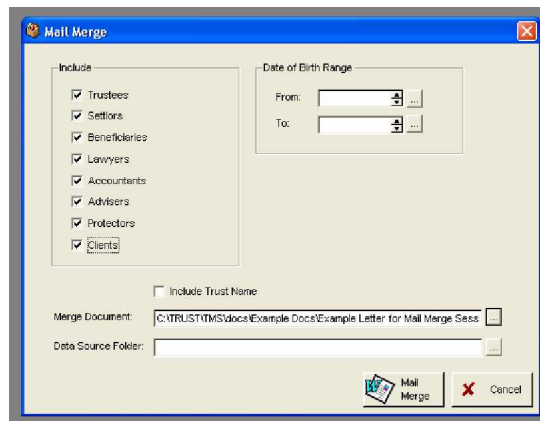


Type your letter (or copy & paste text from existing template)  
 Insert the required Merge Fields into the letter.

You can now save your letter & close word.  
 Open the Trust Service & Select Utilities, then Mail Merge



Select from the list of who should receive this letter.  
 Use the Date of Birth Range to exclude minors (beneficiaries) if necessary  
 Use the Search Box to locate your Merge Document  
 You do not need to select a Data Source Folder



Select Mail Merge to Run

Windows will open and display your letters for you to print.

