

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. The functionality allows you to send letters to all individuals in your database by role type - for example you could send a letter to all lawyers or accountants who are attached to Trusts.

Preparation

Check you have a file called TMSDATA.CSV in the TMS file. If not, email training@cch.co.nz to request a copy.

Five Steps to create a Mail Merge

- | | |
|---|---------------------------|
| 1. Create the Letter Template in Word | In Word |
| 2. Link the Letter Template to the TMSDATA.CSV file | In Word |
| 3. Insert the Merge Fields | In Word |
| 4. Link the Letter to Trust management System | In Trust Service |
| 5. Run the mail merge and produce letter | in Trust Service and Word |

Step 1. Create the letter in Word

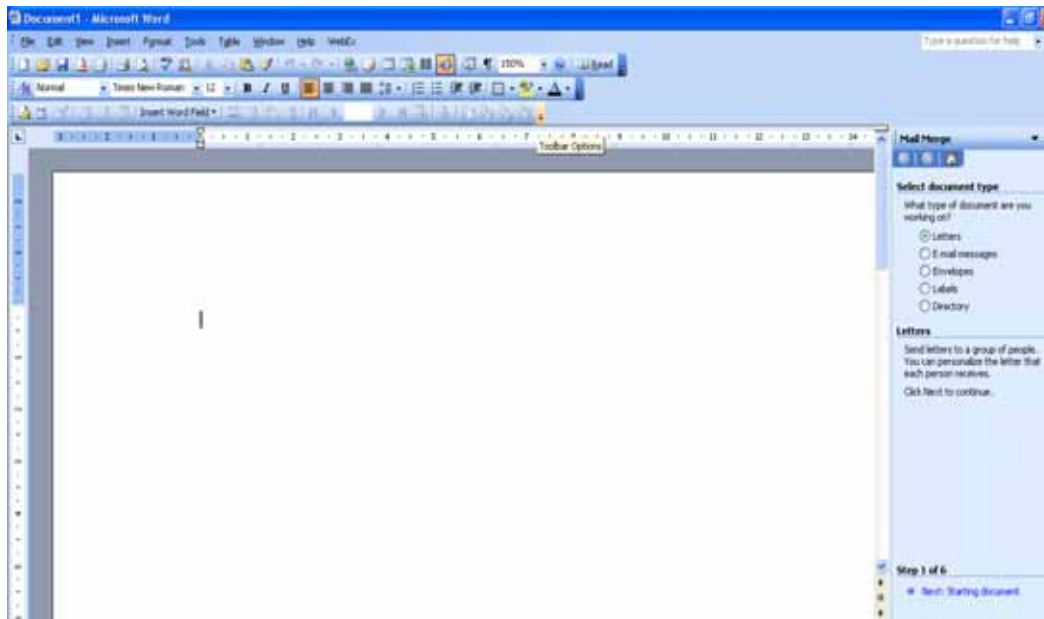
Open Word.

Open a New Word Document

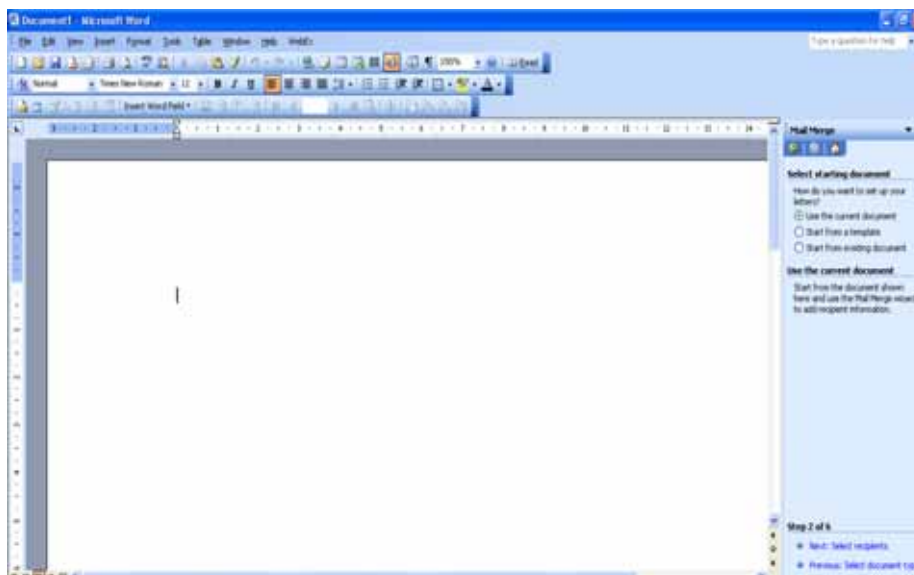
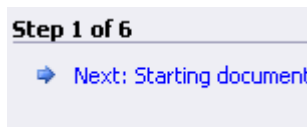
Select Tools/Letters and Mailings/Mail Merge



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



Select Document Type - 'Letter' & move to next step by clicking on hyperlink at bottom of screen.



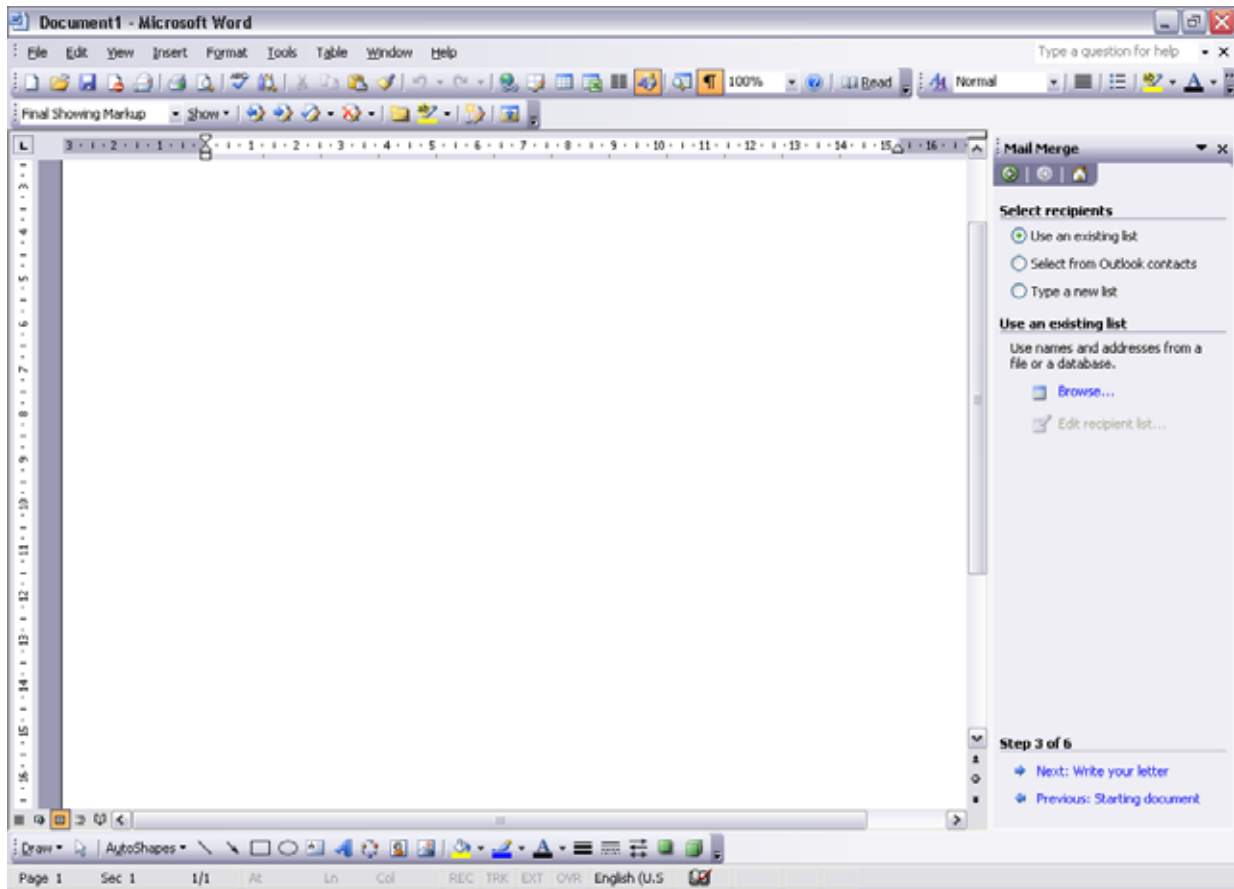
Select the first option 'Use the current document'. Move to next step "Select Receipients" by selecting hyperlink at bottom of screen.

Step 2 of 6

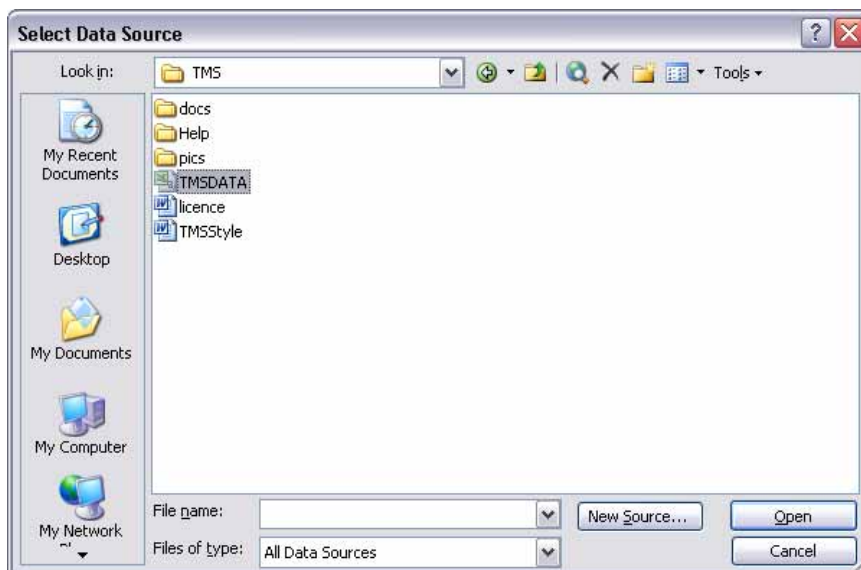
➔ Next: Select recipients

➔ Previous: Select document type

Step 2 - Link the Letter Template to the TMSDATA.CSV file



Select the first option 'Use an Existing List'.
Select the Browse button and the Select Data Source screen will display.



Use this screen to find the TMS Data file (TMSDATA.CSV). This will be located within the TMS file.

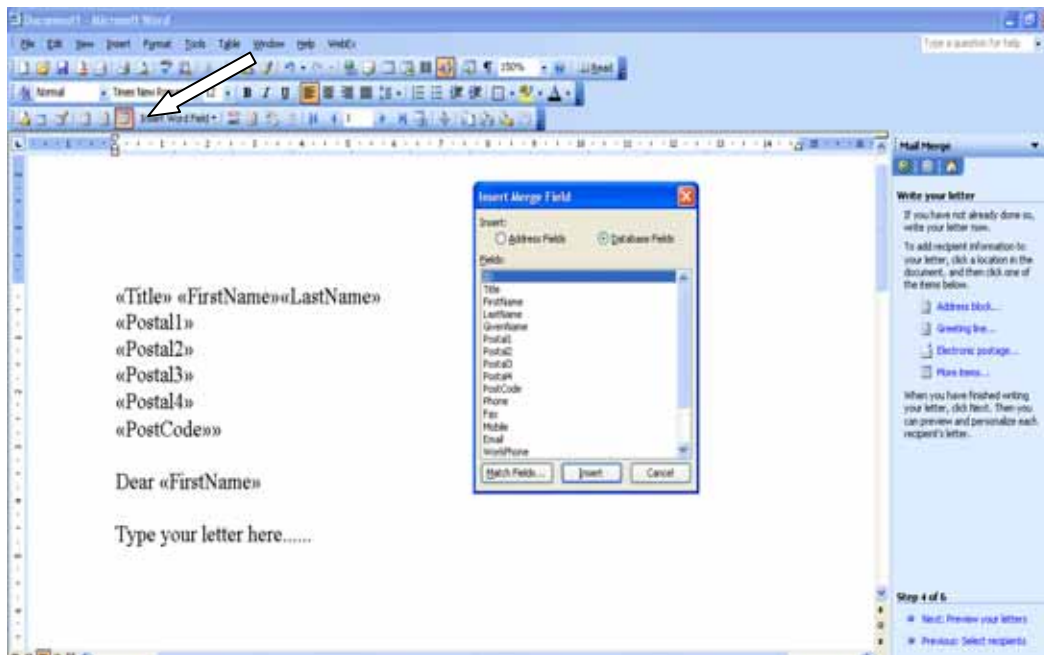
Once highlighted click the Open button.

Step 3 - Insert Merge fields

Click on the Next Step - Write your Letter hyperlink at the bottom of the screen.

Step 3 of 6

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



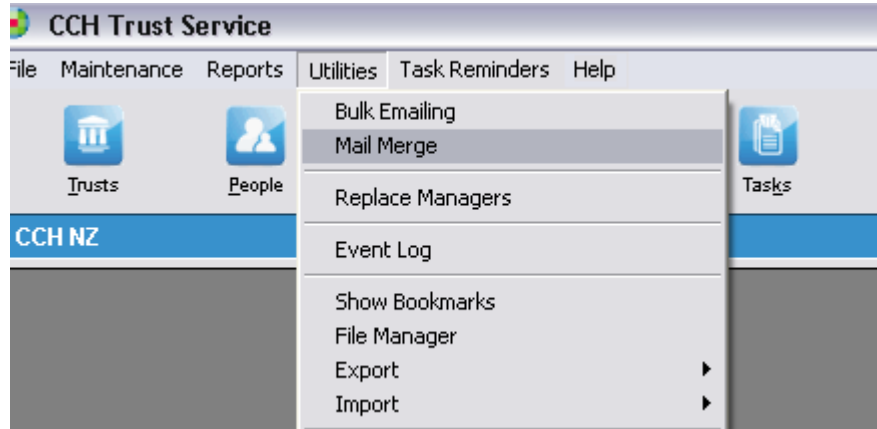
Type your letter (or copy & paste text from existing template)
Insert the required Merge Fields into the letter.

You can now save your letter & close word.

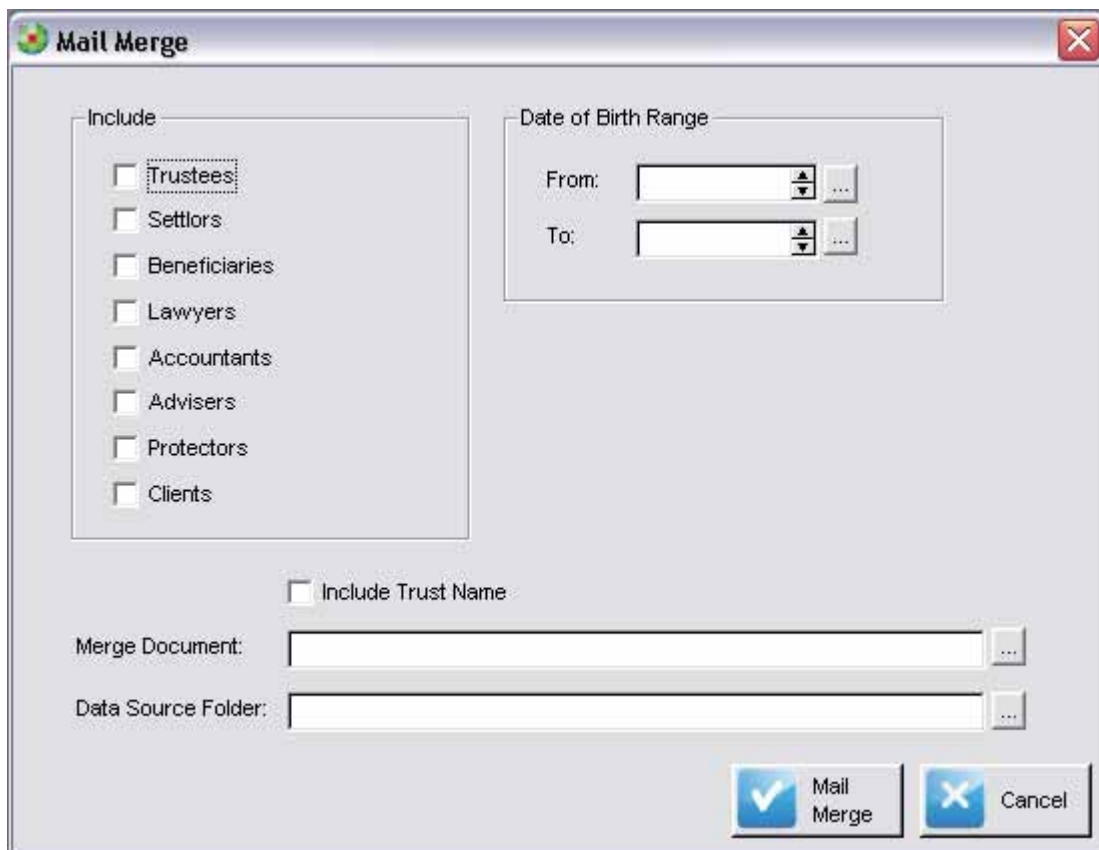
Note: You do not need to finish the other steps in the Microsoft MailMerge Wizard as that information is contained in the Trust Management System. See following.

Step 4 - Link letter to mail merge in Trust Management System

Open the Trust Service & Select Utilities, then Mail Merge



The Mail merge window will display.



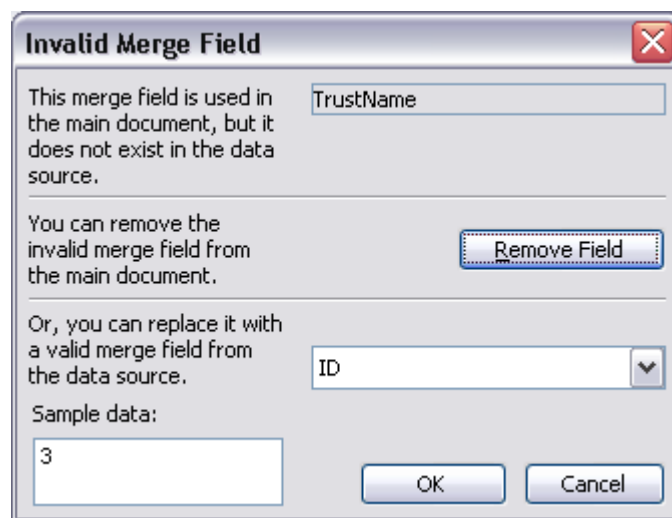
Select from the list of who should receive this letter.

Note: The choice of Lawyers, Accountants or Advisers will select those individuals who have the tick box selected on their individual maintain detail records.

Use the Date of Birth Range to exclude minors (beneficiaries) if necessary
Use the Search Box to locate your Merge Document.


New for 4.3 - As part of the latest release you can now add the Trust Name into a letter. To do this you add the <<TrustName>> merge field onto your letter. Then when you create the mail merge select the Include Trust Name box. This will then fill the field on the mailmerge document.

Important: If you add the merge field on the letter but don't select Include the Trust Name box the following error box will appear.



You do not need to select a Data Source Folder unless you are using a separate data source from TMS Data.

Step 5 - Run Mail Merge and produce letter

Select Mail Merge to Run button. 

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

IMPORTANT: This functionality is the same as doing a mail-merge in word, only one document is produced and each letter is separated by a section break.

