

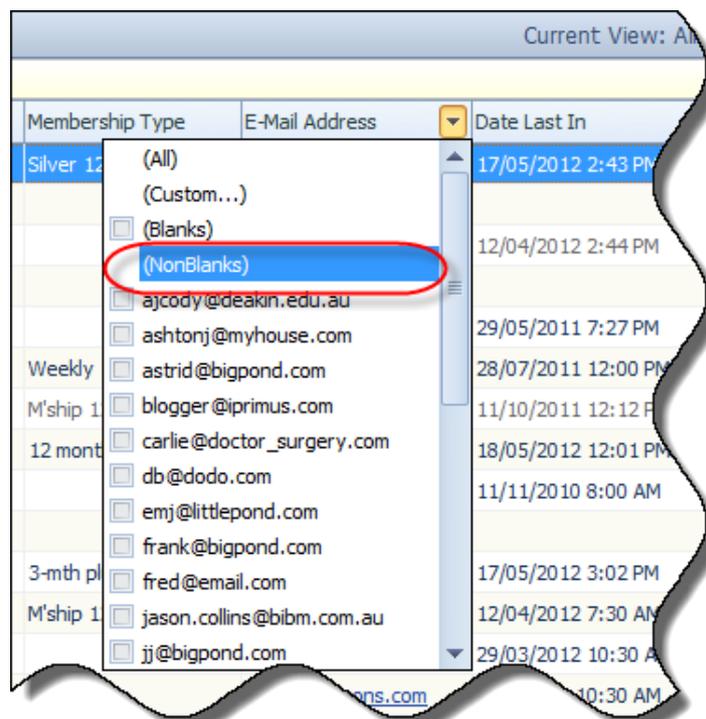
## Mail Merge.

The **'Mail Merge'** allows you to send bulk emails to your clients via Microsoft Word. You can send an email to ALL of your clients or you can send to a selective list (which can be created using the Field Chooser). It is a handy feature if you want to let your clients know about a special you are running or maybe inform them of changes in your timetable.

### Access Method

Firstly, go into your **'Clients & Enquiries'** screen.

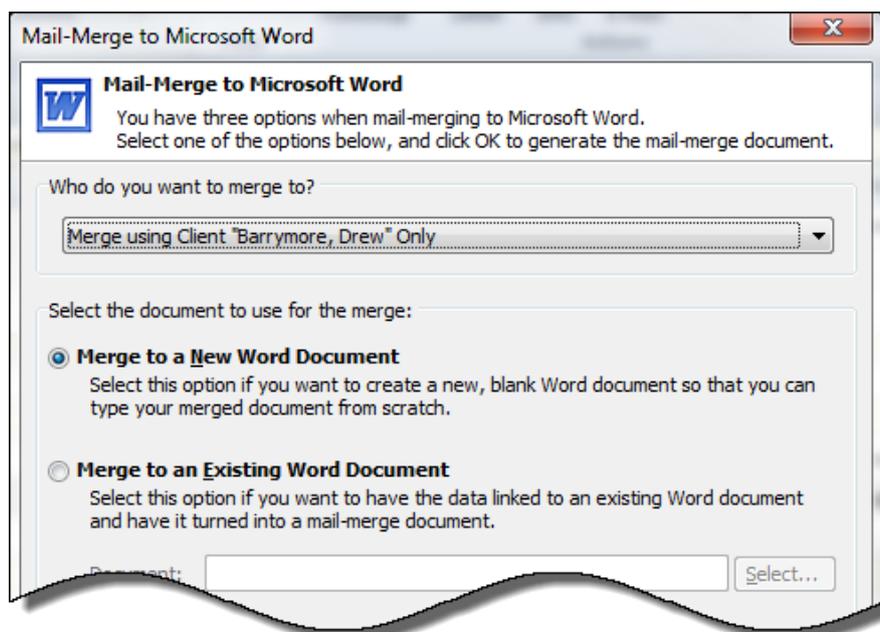
From here, you need to create your list of clients. If you want to send an email to everyone, then that's easy as all clients are already listed in that screen. If you want to send to only those who have a particular Membership, then use the **'Field Chooser'** to create the desired list. Click on the heading **'E-mail Address'** and select **'NonBlanks'**. This will give you only those clients for whom you have an email address.



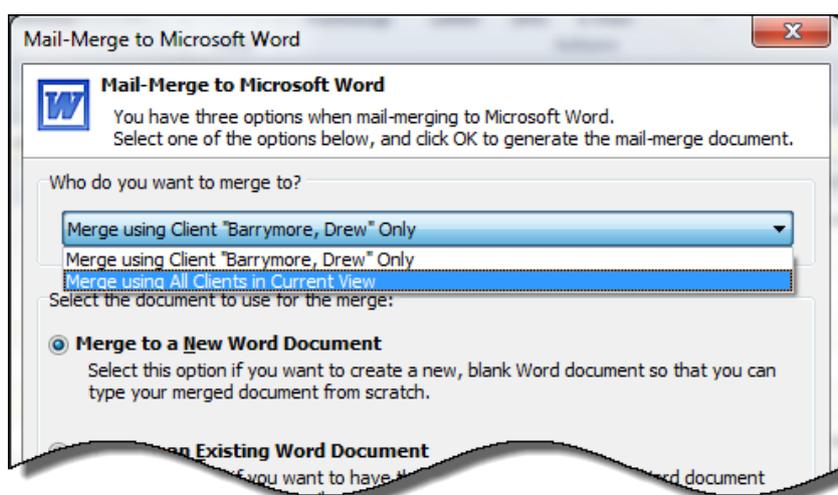
Now that you have your final list, click on **'Mail Merge'**.



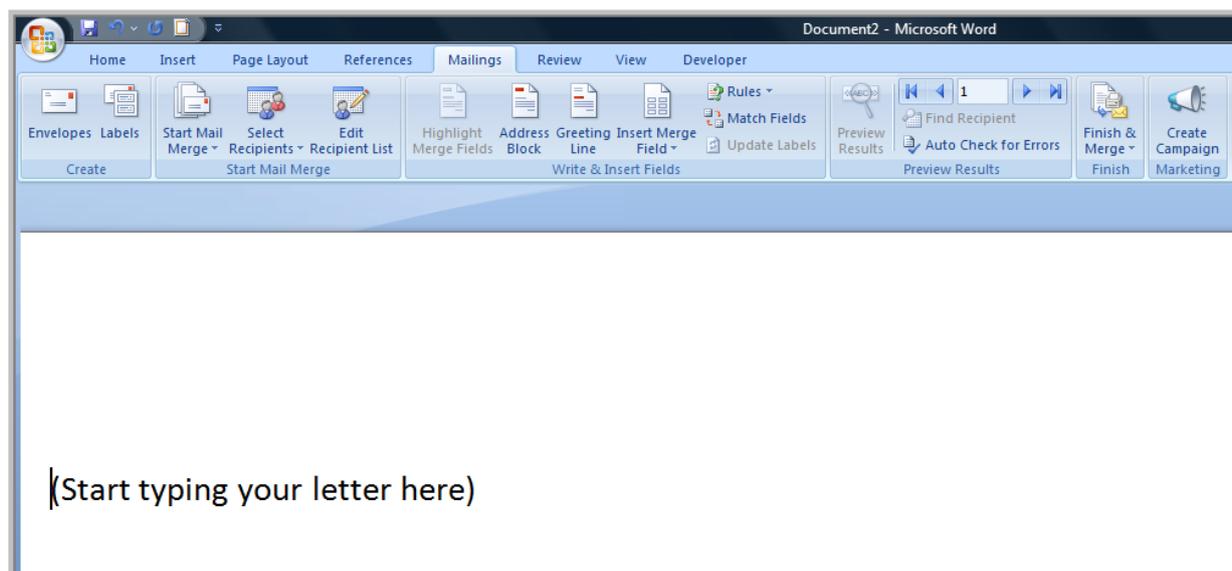
You will then be presented with the choice of a merge to Word or SMS. We will look at a merge to Word so click on that and you will be presented with this screen.



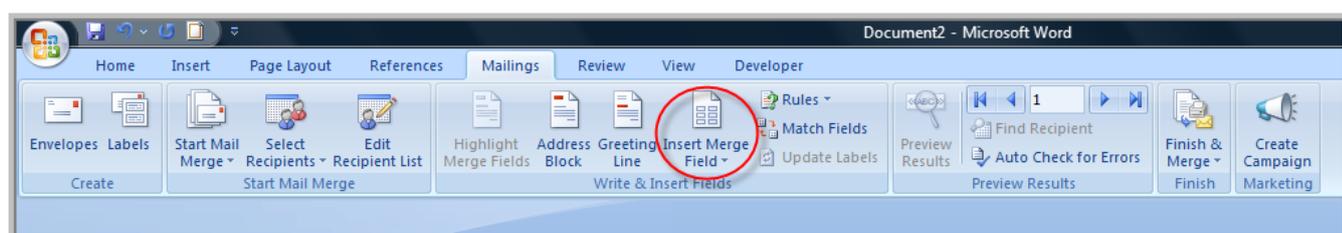
Select who you would like to merge to. We are going to **'Merge using all clients in current view'** and **'Merge to a new document'**.



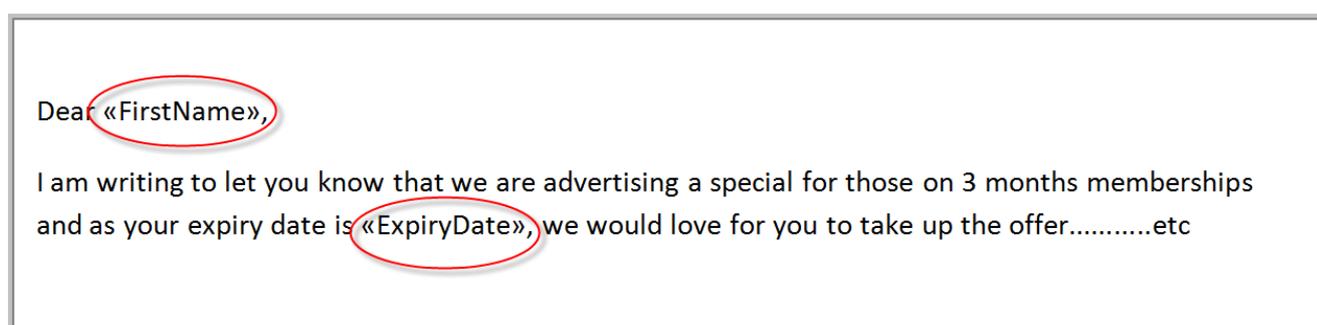
You should see the new document flashing in Microsoft Word at the bottom of your screen so click on it to select it. This is what you will see (depending on your version of MS Word, this screen may differ slightly).



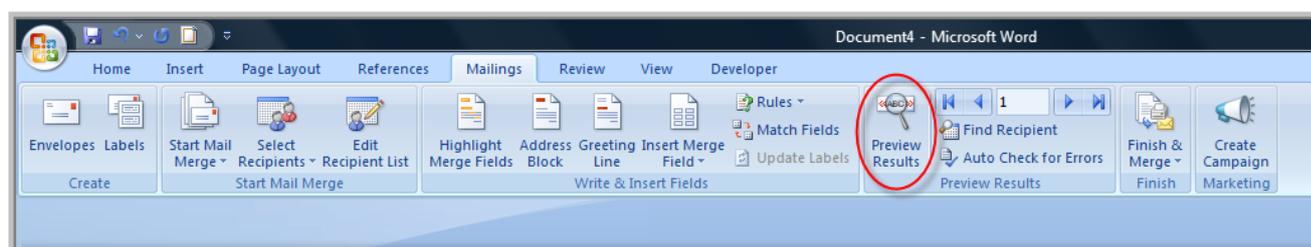
You can now start typing your email and insert the fields that you want merged. To select the merge fields click on 'Insert Merge Field'.



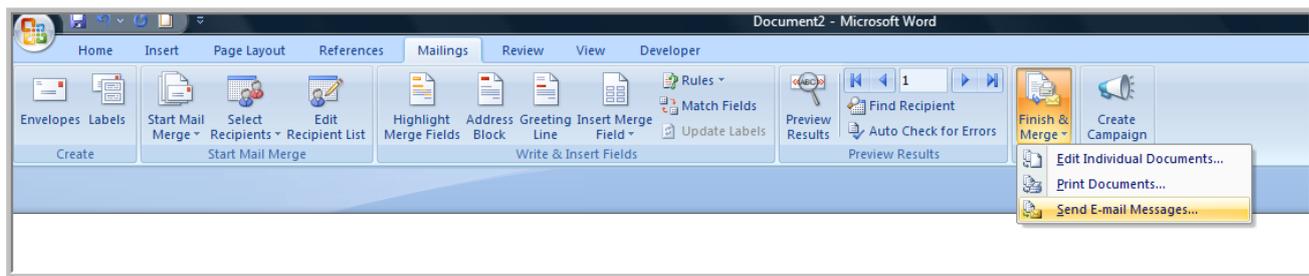
I have started my letter and entered two merge fields, circled.



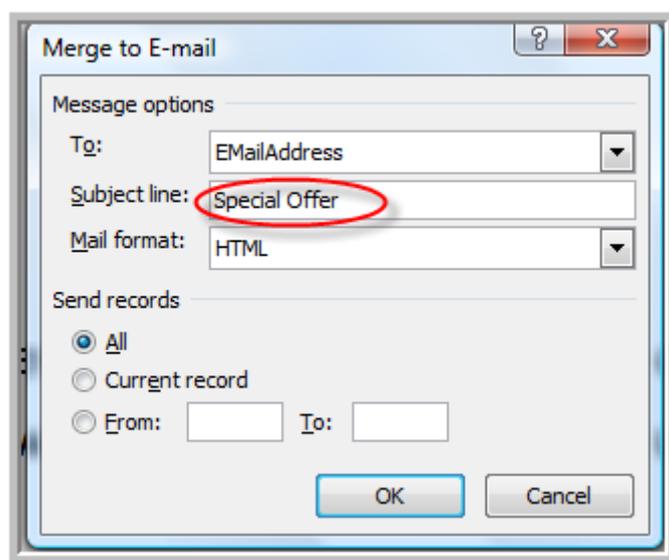
When you have finished your email you can then click on 'Preview Results' to see if you have the correct fields in your final product.



If it's all ok then you can click **'Finish & Merge'**.



Select **'Send email messages'**. You will then be presented with another screen and you can leave the defaults, just add in your subject line.



Click **'OK'**. The merge will then be performed.

You can then save the template document for future use if required. The next time you want to do a mail merge you can use **'Merge to an existing document'** and use the one just created. Otherwise, simply exit out of the document and your mail merge is complete.