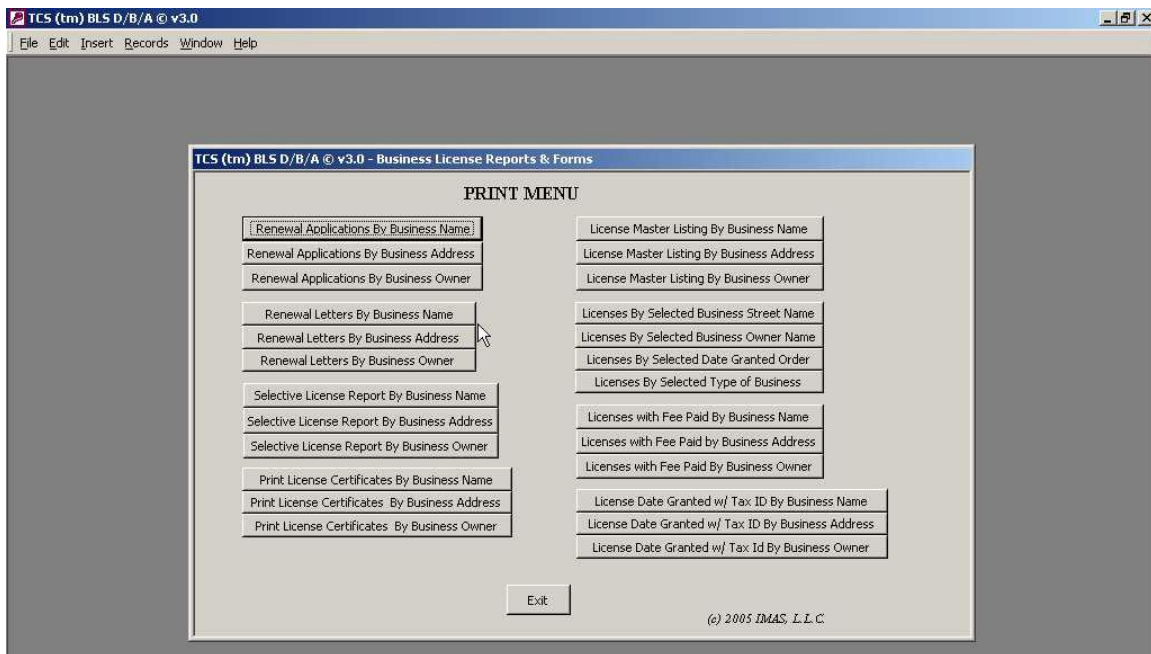




Exceeding the Information Management Needs of City and Town Clerks of New England

How to Perform the Mail Merge Function with BLS Reports

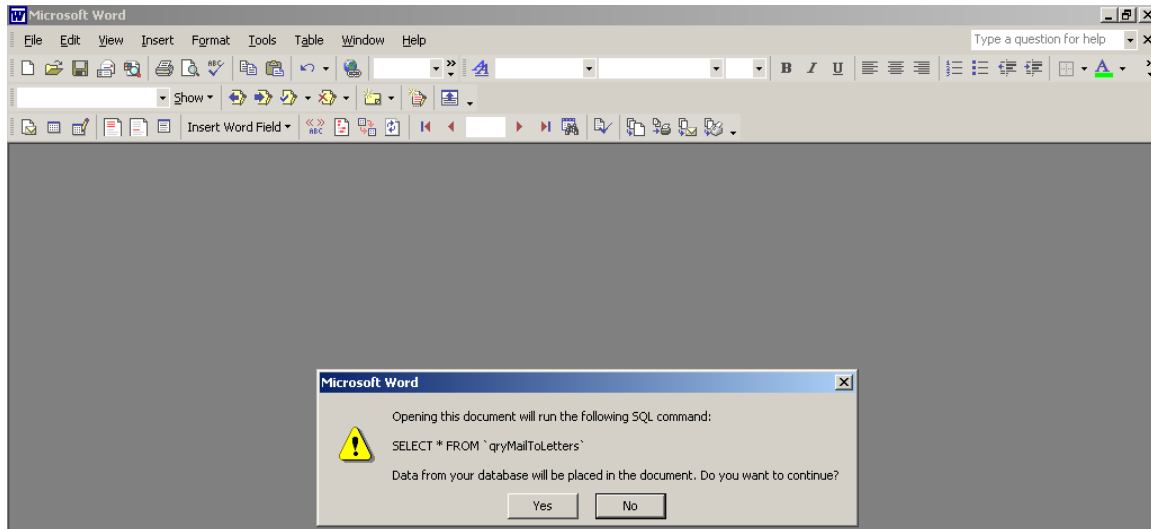
First you will need to open the reports form either by going into the “Business Licenses” menu option off the main form and then choose “Reports” or you can simply go straight to the “Print Menu” option off the main form. Once you are looking at a list of the reports you can choose any three of the sorting methods (by Business name, Business Address or Business Owner) for the “Renewal Letters” or the “Print License Certificates” reports. Once you have selected one of the above mentioned reports you will need to enter valid report criteria so that you return at least one record. Once you have done this a Microsoft Word document should open.



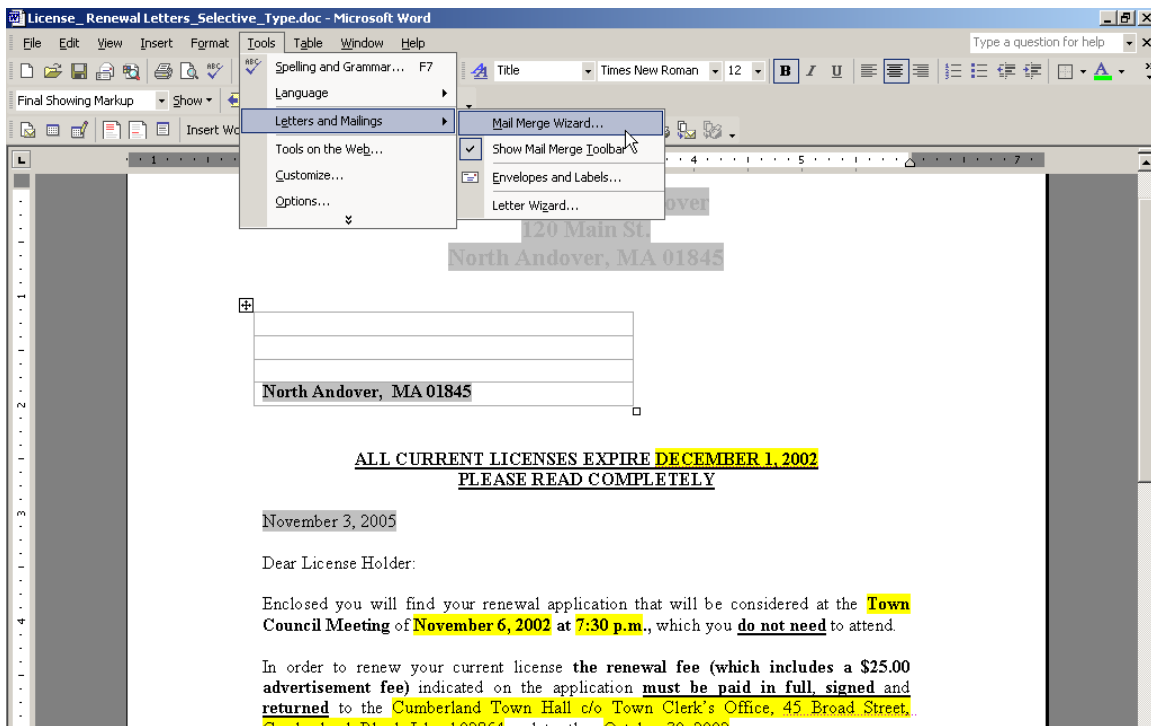
If prompted click “Yes”



Exceeding the Information Management Needs of City and Town Clerks of New England



Next you will need to go to “Tools” and then “Letters and Mailings” and then choose “Mail Merge Wizard” (or something similar to this option if you don’t have the same choice).





Exceeding the Information Management Needs of City and Town Clerks of New England

Make sure the option for “Use an Existing List” is checked off and then go down to the bottom and select “Next: Write Your Letter”.

This is where you can move your cursor over to the Mail-Merged letter and change any of the text that is highlighted in yellow or any text in general that doesn’t apply to your Town/City. Be careful not to change any text that is highlighted in gray. (Make sure not to alter the top of the letter that displays your Town/City’s information, the grid to the top left of the letter that will display the business information and the line that says “Clerk’s Name” at the bottom. These fields will be automatically populated by the application at the end of the mail-merge).

The screenshot shows a Microsoft Word window titled "License_Renewal Letters_Selective_Type.doc - Microsoft Word". The document contains two mail-merged letters. The first letter is dated "November 3, 2005" and the second is dated "November 3, 2002". Both letters contain the same text, which includes a deadline for license renewal. The text in the letters is partially highlighted in yellow and gray. The right sidebar shows the "Mail Merge" task pane with the "Write your letter" section selected. The "Use an existing list" section is also visible, with the "Select a different list..." option checked. The "Next: Write your letter" button is highlighted in the "Step 3 of 6" section.



Exceeding the Information Management Needs of City and Town Clerks of New England

Once satisfied with the changes you've made to the letter you can go to the bottom right of the screen and select "Next: Preview Your Letters".

From here you can use the arrows at the top of the screen or the arrows pointing to the right and left on the right of the screen to navigate through your letters from the first to the last. Once your satisfied with the results you can go to the bottom right of the screen and click on the "Next: Complete the Merge" button.

The screenshot shows the Microsoft Word Mail Merge interface. The main window displays a letter template for the Town of North Andover. The letter content is as follows:

Town of North Andover
120 Main St.
North Andover, MA 01845

North Andover, MA 01845

ALL CURRENT LICENSES EXPIRE November 3, 2005
PLEASE READ COMPLETELY

November 3, 2005

Dear License Holder:

Enclosed you will find your renewal application that will be considered at the **Town Council Meeting of November 6, 2002 at 7:30 p.m.**, which you **do not need** to attend.

In order to renew your current license the **renewal fee (which includes a \$25.00 advertisement fee)** indicated on the application **must be paid in full, signed and returned** to the **Cumberland Town Hall c/o Town Clerk's Office, 45 Broad Street, Cumberland, Rhode Island 02864** no later than **October 30, 2002**.

«MailA.ddr1»
«MailA.ddr2»
«MailA.ddr3»
«MailA.dd4»

ALL CURRENT LICENSES EXPIRE November 3, 2005
PLEASE READ COMPLETELY

November 3, 2005

Dear License Holder:

Enclosed you will find your renewal application that will be considered at the **Town Council Meeting of November 6, 2002 at 7:30 p.m.**, which you **do not need** to attend.

In order to renew your current license the **renewal fee (which includes a \$25.00 advertisement fee)** indicated on the application **must be paid in full, signed and returned** to the **Cumberland Town Hall c/o Town Clerk's Office, 45 Broad Street, Cumberland, Rhode Island 02864** no later than **October 30, 2002**.

The Mail Merge task pane on the right shows the following steps:

- Preview your letters
- Make changes
- Step 5 of 6: Next: Complete the merge
- Step 4 of 6: Next: Preview your letters



Exceeding the Information Management Needs of City and Town Clerks of New England

Now you will see the completed Mail-Merge letter and you can click on the “Print” button to the right to bring up the printer options.

The screenshot shows the Microsoft Word Mail Merge process. The top window shows the Mail Merge task pane with the 'Merge' section active, where the 'Print...' button is highlighted. The bottom window shows the completed letter for a specific recipient.

Letter Template (Top Window):

Town of North Andover
120 Main St.
North Andover, MA 01845

North Andover, MA 01845

**ALL CURRENT LICENSES EXPIRE November 3, 2005
PLEASE READ COMPLETELY**

November 3, 2005

Dear License Holder:

Enclosed you will find your renewal application that will be considered at the **Town Council Meeting of November 6, 2002 at 7:30 p.m.**, which you **do not need** to attend.

In order to renew your current license the renewal fee (which includes a \$25.00 advertisement fee) indicated on the application **must be paid in full, signed and returned** to the Cumberland Town Hall c/o Town Clerk's Office, 45 Broad Street, Cumberland, Rhode Island 02864 no later than October 30, 2002.

Completed Letter (Bottom Window):

Town of North Andover
120 Main St.
North Andover, MA 01845

ZOLOT HOWARD M DMD
HOWARD
1538 TURNPIKE ST
N ANDOVER, MA 01845

**ALL CURRENT LICENSES EXPIRE November 3, 2005
PLEASE READ COMPLETELY**

November 3, 2005

Dear License Holder:

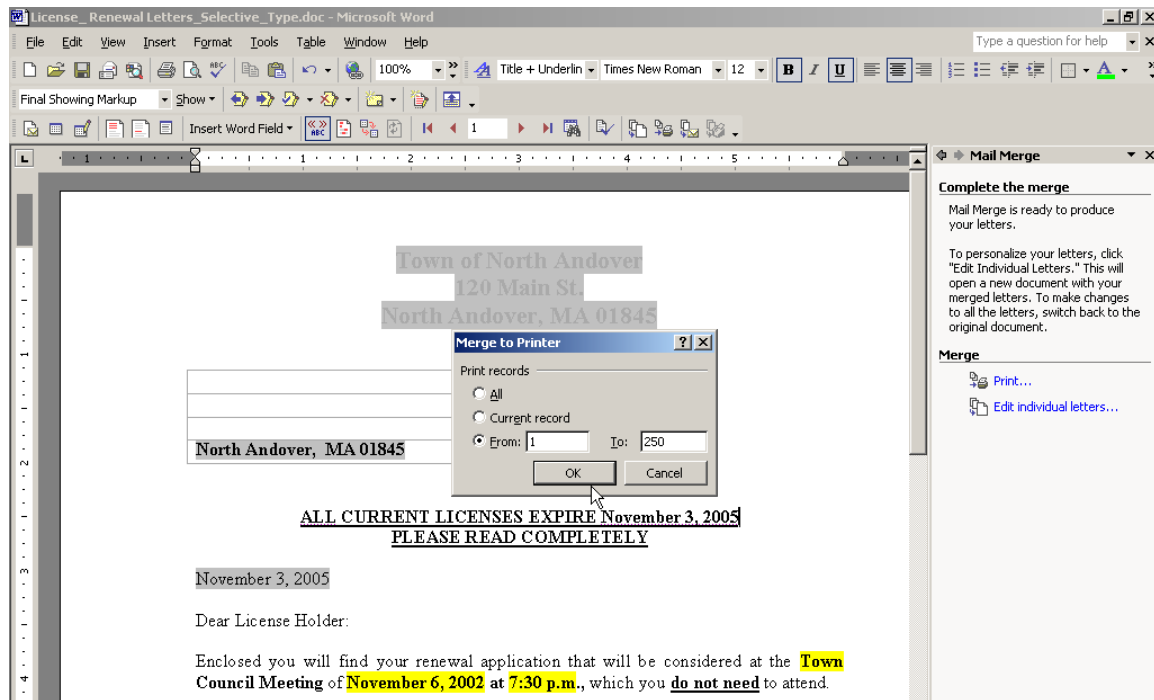
Enclosed you will find your renewal application that will be considered at the **Town Council Meeting of November 6, 2002 at 7:30 p.m.**, which you **do not need** to attend.

In order to renew your current license the renewal fee (which includes a \$25.00



Exceeding the Information Management Needs of City and Town Clerks of New England

From here you will need to determine if you want to print all of the letters, just the current letter or from a page range and then click the “OK” button.



This will now bring up your default printer options. This is where you can send the letters to a printer other than your default printer or change some of the default printer options. Once you are satisfied with your printer options you can click on the “OK” button and the letters will be sent to your printer, completing the Mail-Merge process. After you have printed your letters you can close the Mail-Merge letter and the application will ask you if you want to save your changes to the Mail-Merge letter and you can select “Yes” so that you will have any changes/updates made to this letter saved for the next time you perform this process.



Exceeding the Information Management Needs of City and Town Clerks of New England

The screenshot shows a Microsoft Word window titled "License_Renewal Letters_Selective_Type.doc - Microsoft Word". The Mail Merge task pane on the right is active, showing "Complete the merge" instructions and options to "Print..." or "Edit individual letters...". A "Print" dialog box is open in the foreground, showing printer settings for "WNTSERV\Panasonic FP-D350 P5 (Copy 2)". The document text is partially visible, including "North Andover", "November 3,", and "Dear Licensee". The word "Town" in the sentence "Enclosed you will find your renewal application that will be considered at the **Town Council Meeting** of November 6, 2002 at 7:30 p.m., which you do not need to attend." is highlighted in yellow.