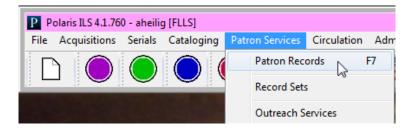
FAQ: How to create mass mailing with Mail Merge and Patron Record Set- Polaris, Excel, Microsoft Word 2010

You first want to create a Patron Record containing the information you wish you utilize for the mailing. [Ex. Using the PSTAT3 field to narrow down head of households in a library region.]

<u>Step One</u>: Go to the Patron Records Find Tool in the Polaris browser by clicking on the **Patron Services** tab and selecting **Patron Records**. You may also use the shortcut <u>F7</u> to access this tab.



<u>Step Two</u>: Search by preferred parameters. For this example, we used the *PSTAT3* field to isolate those patrons who were listed as the head of household in their residence. You could substitute for any field to suit your intended targets. You can narrow your results by using the limit by bar to concentrate on a single library or any other parameter you need.

General Setti	ings							
Object:	Patron Records	✓ Limit by: Patro	on's registered library	•	Search M Norm		Search	
Search by:	PSTAT3		dor - Candor Free Library (C)		Powe	r	Stop	
Type:	Exact match (implicitly truncated)	Cinci	 Stewart B. Lang Memorial innatus - Kellogg Free Library 		© SQL		New Sea	rc
			land - Cortland Free Library (len - Southworth Library (DR		Count (Dalu	Clear	
Sort by:	(None)	Fair	Haven - Fair Haven Public Lib	nri l	Count	Uniy		_
For:	head) - Finger Lakes Library Syste on - Groton Public Library (Gl				Help	
				<u></u>				
Barcode	Name	Street	City	State	Zip	Library		
					Zip 13053		- Southw	
D2027064855	BLECK, SCHINELL		City	State	•	Dryden -	- Southw - Southw	
D2027064855 D2027033749	BLECK, SCHINELL TESORIERO, MELISSA		City DRYDEN	State NY	13053	Dryden - Dryden -		
D2027064855 D2027033749 D2027006085	BLECK, SCHINELL TESORIERO, MELISSA ELLINWOOD, MARIAN		City DRYDEN DRYDEN DRYDEN DRYDEN	State NY NY NY	13053 13053 13053	Dryden Dryden Dryden	- Southw - Southw	
Barcode D2027064855 D2027033749 D2027006085 D2027020172 D2027007560	BLECK, SCHINELL TESORIERO, MELISSA ELLINWOOD, MARIAN HANSON HAMES EVERETT, ANNE M		City DRYDEN DRYDEN DRYDEN DRYDEN FREEVILLE	State NY NY NY NY	13053 13053 13053 13053 13053 13068	Dryden - Dryden - Dryden - Dryden -	- Southw - Southw - Southw	
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D2027064855 D2027033749 D2027006085 D2027006085 D2027007560 D2027101348	BLECK, SCHINELL TESORIERO, MELISSA ELLINWOOD, MARIAN HANSON HAME EVERETT, ANNE M ARNOLD, CAREN D BRANTLEY, CYNTHIA A		City DRYDEN DRYDEN DRYDEN FREEVILLE DRYDEN	State NY NY NY NY NY	13053 13053 13053 13053 13068 13053	Dryden - Dryden - Dryden - Dryden - Dryden - Dryden - Dryden -	- Southw - Southw - Southw - Southw	

Remember to press *CTRL* + *SHIFT* + *A* to access all the records that were found. If not, you will not be able to select all of them. <u>Step Three</u>: You can choose which records you would like to use or press CTRL+ALT+A to select all the records. Then right click to **Add to Record Set**, then **New**.

Type:	Exact mat	ch (implicitly truncated)	•		Kellogg Free Library		© sQL		New Sea	rch
Sort by:	(None)		•	Dryden - Sou	Southworth Library (DRV) en - Fair Haven Public Libra		Count Only		Clear	
For:	head	head 👻		RLS - Finger Lakes Library System Groton - Groton Public Library (GRI *					Help	
Barcode	Na	ame	Street		City	State	Zip	Library	21	
0202706485	55 BL	ECK, SCHINELL	4		DRYDEN	NY	13053	Dryden -	Southw	P
D202703374	19 TE	SORIERO, MELISSA	-		DRYDEN		13053	Dryden -	Southw	
0202700608	85 EL	LINWOOD, MARIAN			DRYDEN		13053	Dryden -	Southw	
D202707017	73 HV	ANSON, JAMES			DRYDEN		13053	Dryden -	Southw	
0202708568	81 P.4	LMER, FRANKLIN W			DRYDEN		13053	Dryden -	Southw	
0202708851	16 RH	ENEHART, MARTHA			CORTLAND		13045	Dryden -	Southw	
D202710444	13 CC	OOLEY, Ryan			NEWFIELD		14867	Dryden -	Southw	
0202700673	84 M	CDONOUGH, DIANE D			DRYDEN		13053	Dryden -	Southw	
020270586	34 KE	LEMEN, OERS			DRYDEN		13053	Dryden -	Southw	
0202700685	57 YA	EGER, CAROLYN A		7.	FREEVILLE		13068	Dryden -	Southw	
D202700756	50 EV	ERETT, ANNE M			FREEVILLE	NY	13068	Dryden -	Southw	
D202710134	18 AF	NOLD, CAREN D	1000		DRYDEN	NY	13053	Dryden -		
D202704481	13 BR	ANTLEY, CYNTHIA A	20 9	Open		NY	13068	Dryden -	Southw	
0202708392	22 SH	IIRK, BARBARA J	7 B	Check Out		NY	13053	Dryden -	Southw	
D202704496	50 Pe	rrv. Mistv	29.5	Place Hold		NY	13053	Dryden -	Southw	1
ne				Status Print		record				
			ii.	Add to Record S	Set 🔸	New				
				Add to Mailing		E	xisting			

<u>Step Four:</u> After creating a **Title** and **Note**, after saving your new **Record Set**, make a note of the **Record Set number** located in the header. (If you lose this number, you can always search for it under **Patron Services** \rightarrow **Record Sets** \rightarrow **Search by title**.) You will need it to use **Mail Merge**.

		🗙 📒 😭	<u>2</u>				
Name:	DRY-Head Of	Household	Owner: aheilig			▼ Recor	d type: Patron
Note:	created using	PSTAT3 field/head				Numb	er of records:
					Q	w 🔤	i 🖻 🖨
Barcode		Name	Street	City	State	Postal	Library
D202700	0097	SANTIAGO, JENNIFER	23	DRYDEN	NY	13053	Dryden - South
D202700	0110	BULLOCK, VALERIE H		DRYDEN	NY	13053	Dryden - South
D202700	0241	LEVAN, LINDA J		FREEVILLE	NY	13068	Dryden - South
D202700	0429	PROULX, MARGARET	E	ETNA	NY	13062	Dryden - South
D202700		CANFIELD, DONNA G		RICHFORD	NY	13835	Dryden - South
D202700		YEAGER, AMY E		FREEVILLE	NY	13068	Dryden - South
D202700		MCGORY, BETTY J		FREEVILLE	NY	13068	Dryden - South
D202700		REED, JACK T		DRYDEN	NY	13053	Dryden - South
D202700		BUTTON, CHERYL D		DRYDEN	NY	13053	Dryden - South
D202700		HARRIS, FRED		DRYDEN	NY	13053	Dryden - South
D202700		GOODENOUGH, TRIC	IAR	DRYDEN	NY	13053	Dryden - South
D202700		KIEFER, PATRICIA A		FREEVILLE	NY	13068	Dryden - South
D202700		CHAMBERLAIN, JOYC	ΈE	DRYDEN	NY	13053	Dryden - South
		GILBERT, MARY C		DRYDEN	NY	13053	Dryden - South
D202700		INTERPORT AND CATHERDS	NEC	DRYDEN	NY	13053	Dryden - South
D202700 D202700	2081	WAKEMAN, CATHERI	INE 5	DRIDEN	191	10000	bryden bodd

<u>Step Five</u>: Create an Excel file containing your new **Patron Record Set**.

In the Polaris Toolbar, click on:

Utilities → Reports and Notices (New window will open) Custom → Public Services → Patron Services → Patron Mailing List By Patron Record Set

Polaris ILS 4.1.760 - aheilig [FLLS]				
File Acquisitions Serials Catalog	ging Patron Services Circulation Administration	Utilities Window H	elp	
	Reports and Notic	ces		
		Importing		•
🖷 Polaris Reports				
		Quick-circ hern Re	onda	
Report Categories:	Available Reports:			
E ← Polaris	Name AA-Patron List by Patron Code and Stat Class AA-Patron List for Off-Line Circ by Barcode		Type Report Report	Date Modified 10/10/2012 9:41 AM 10/10/2012 9:41 AM
Ē⊡ Circulation Ē⊡ Custom Ē⊡ Cataloging	AA-Patron Mailing List		Report Report	10/10/2012 9:42 AM 10/10/2012 9:41 AM
Circulation Deposit Collections PAC	AA-Patron Stat Class Count by Patron Code AA-Patron Statistical Class Count by Library AA-Patrons Without A Password		Report Report Report	10/10/2012 9:42 AM 10/10/2012 9:42 AM 10/10/2012 9:42 AM
Public Services Patron Financial Patron Services Notices PAC	AA-Patrons without Stat Class by Library		Report	10/10/2012 9:42 AM

Make sure that you select Excel as your **Output Type** by clicking the printer icon in the top right corner and selecting Excel.

Polaris Reports					<u> </u>
				<u> </u>	
Polaris Cataloging Crculation Custom Custom Custom Custon Difference Circulation Difference Circulation Difference Pace Pace Pace	Available Reports: Name AA-Patron List by Patron Code and Stat Class AA-Patron List for Off-Line Cric by Barcode AA-Patron Mailing List AA-Patron Mailing List by Record Set AA-Patron Stat Class Count by Patron Code AA-Patron Statistical Class Count by Library AA-Patron Statistical Class Count by Library AA-Patrons Without A Password AA-Patrons without Stat Class by Library	Type Report Report Report Report Report Report	Date Modified 10/10/2012 9:41 AM 10/10/2012 9:41 AM 10/10/2012 9:42 AM		Adobe PE HTML 4.0 MHTML Excel CSV Word

Step Six: Use the Patron Record Number to generate the Excel file and then save to an appropriate file.

You are now ready to use Microsoft Word 2010 to use the Mail Merge feature to create labels, envelopes, etc.

Microsoft Word 2010 Mail Merge

<u>Step One</u>: After opening your Word document, select the **Mailings** tab at the top. Click on the **Start Mail Merge** icon then select the **Step by Step Mail Merge Wizard**.

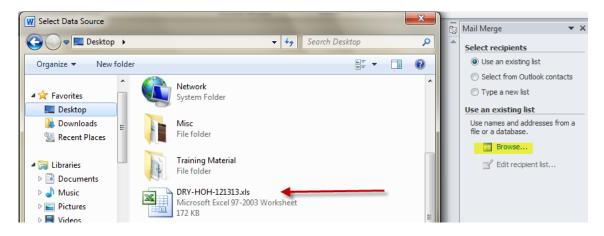
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File Home	Inser	t Page Layout	References	Mailings	Review	View
Envelopes Labels	Start Ma Merge	il Select E Recipients • Recip		nlight Address Fields Block	Greeting Line	Insert Merge Field -
Create		etters			Write & Ir	nsert Fields
	<u>E</u>	mail Messages				
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	a Li	ibels				
		irectory				
	W N	ormal Word Docume	nt			
	🛒 St	ep by Step Mail Mer	ge <u>W</u> izard			

Step Two: Select E-mail messages from the side column. Then click next at the bottom to continue.

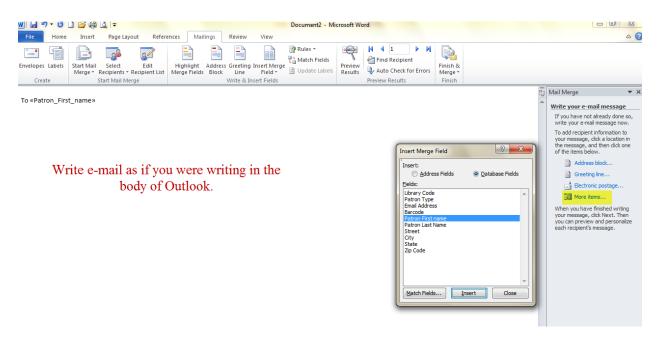
Select document type
What type of document are you working on?
C Letters
E-mail messages
Envelopes
🔘 Labels
Directory
E-mail messages
Send e-mail messages to a group of people. You can personalize the e-mail message that each person receives.
Click Next to continue.

It will then ask you to select a document. Select "Use Current Document." Click Next at bottom.

<u>Step Three:</u> When prompted to select recipients, **Use an existing list**, and **Browse** to find your **Excel Patron Record Set**.



<u>Step Three</u>: You will then be prompted to write your email. You can personalize each email based off the excel sheet by selecting the More Items tab and clicking on the items you wish to include. These will be placeholders until you continue to the next step. Use the place holders to get the formatting of your email the way you want.



When the email looks the way you want, click next.

<u>Step Four</u>: You can now preview your email and see that the placeholders have been replaced by the patron's name, address, or item that you chose previous. You may also choose to exclude patrons at this time by selecting the Exclude this recipient tab on the right. When done, click next.

Step Five:. Select Electronic Mail... from the right column. It will prompt you to fill in the subject line. The email address given in the Excel spreadsheet will be filled in when you click okay.

<u>Step Six</u>: Click okay and the emails will be sent. If there is an incorrect spelling or invalid address, it will create a pop up that will allow you to fix it.

You're now ready to send mass emails to your patrons using Excel and Mail Merge!

Notes:

• It will send the emails when you are finished. Make sure you are ready to send the mailing before completing the merge.