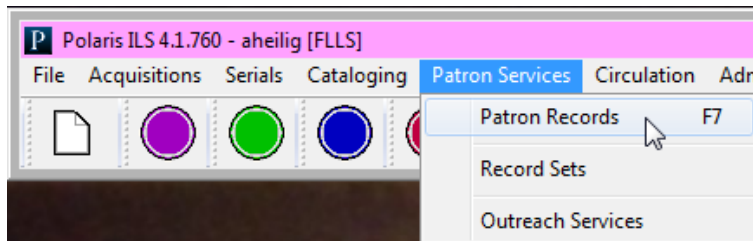


**FAQ:**

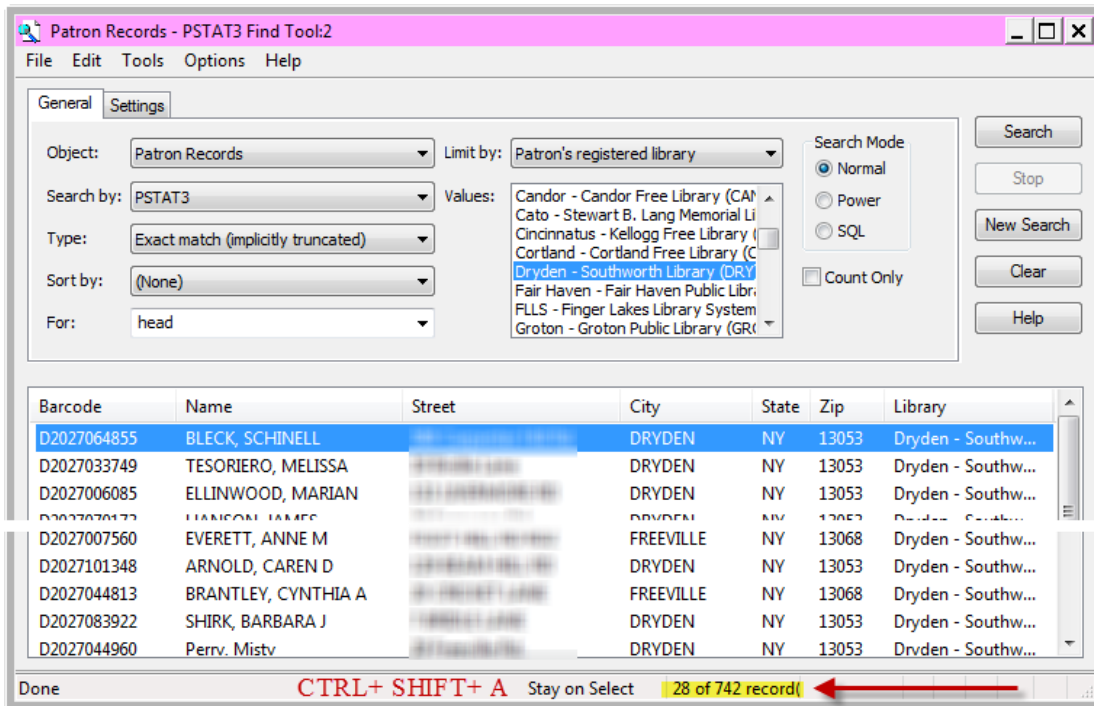
**How to create mass mailing with Mail Merge and Patron Record Set- Polaris, Excel, Microsoft Word 2010**

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.]

**Step One:** 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 **F7** to access this tab.

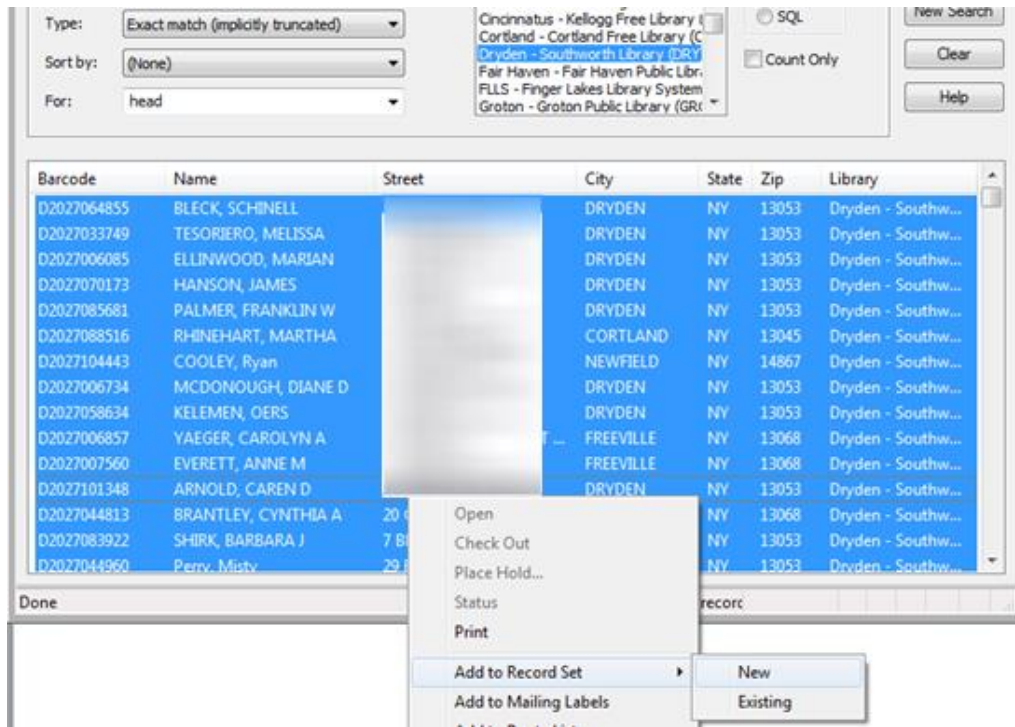


**Step Two:** Search by preferred parameters. For this example, we used the *PSTAT3* field to isolate those patrons who were listed as the head of household in their residence. You could substitute for any field to suit your intended targets. You can narrow your results by using the limit by bar to concentrate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

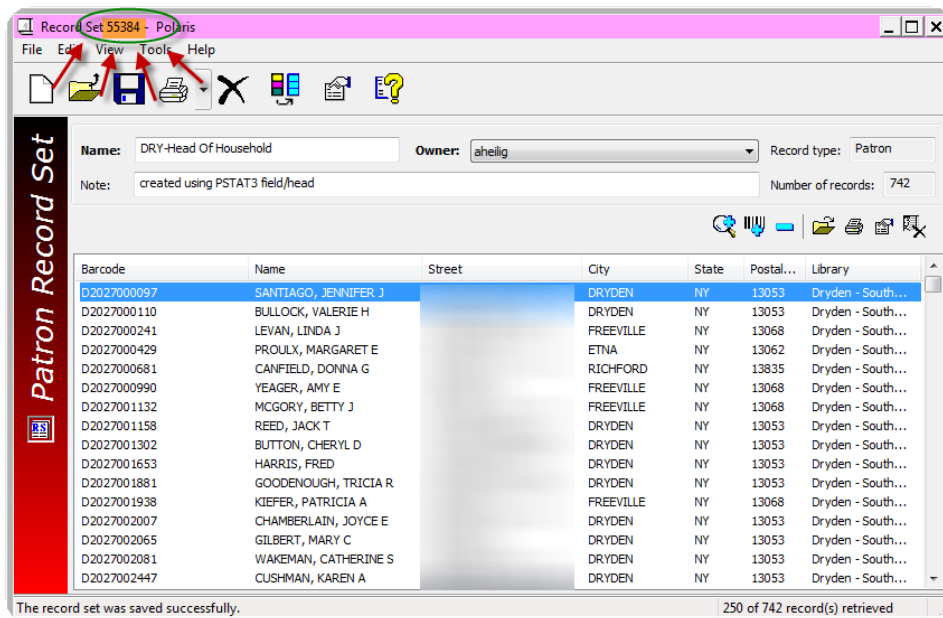


Remember to press *CTRL + SHIFT + A* to access all the records that were found.  
**If not, you will not be able to select all of them.**

**Step Three:** 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**.



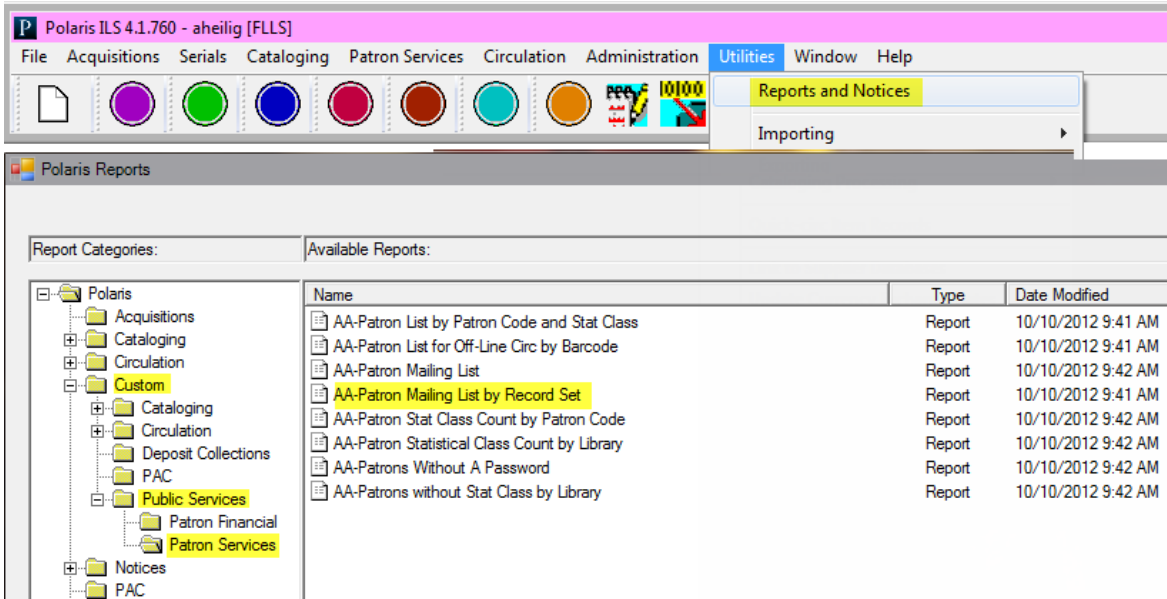
**Step Four:** After creating a **Title** and **Note**, after saving your new **Record Set**, make a note of the **Record Set number** located in the header. (If you lose this number, you can always search for it under **Patron Services** → **Record Sets** → **Search by title**.) You will need it to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



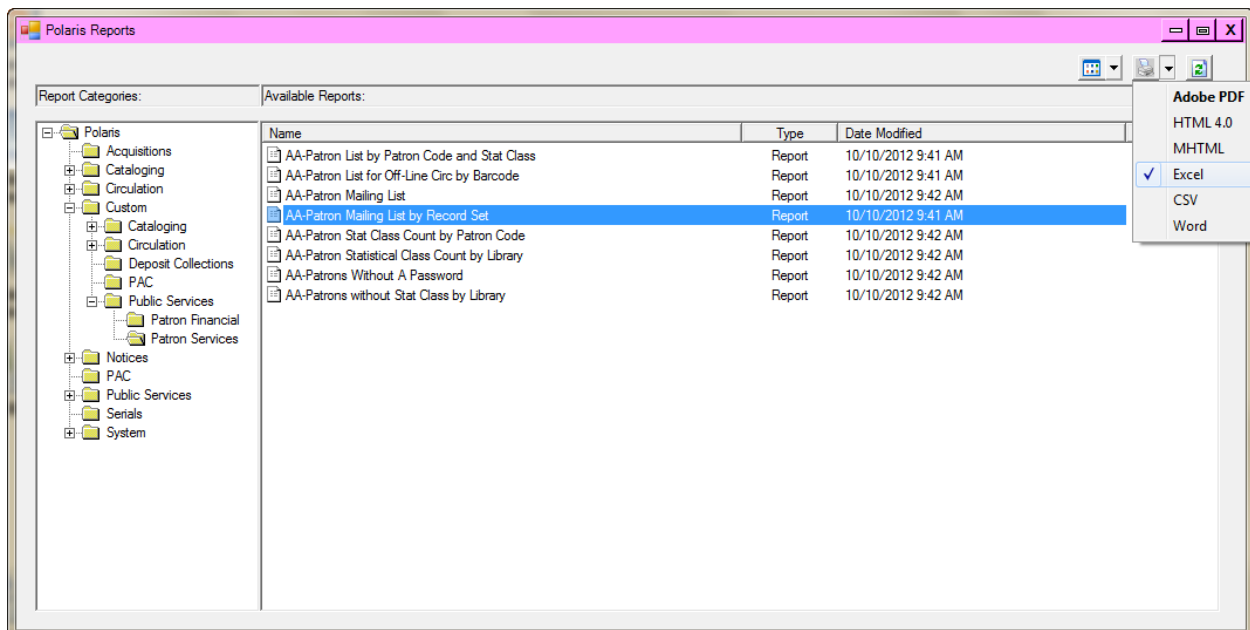
**Step Five:** Create an Excel file containing your new **Patron Record Set**.

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**



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

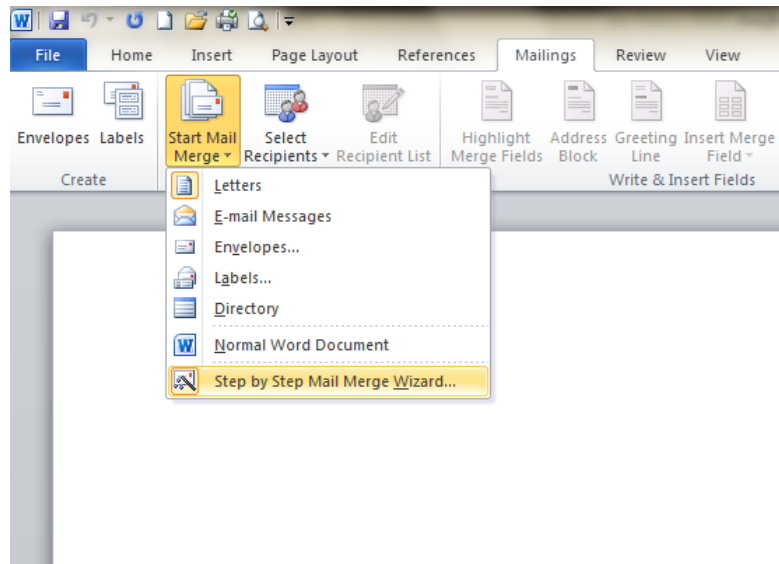


**Step Six:** Use the *Patron Record Number* to generate the Excel file and then save to an appropriate file.

**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

**Step One:** 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**.



**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?

- Letters
- E-mail messages
- Envelopes
- Labels
- Directory

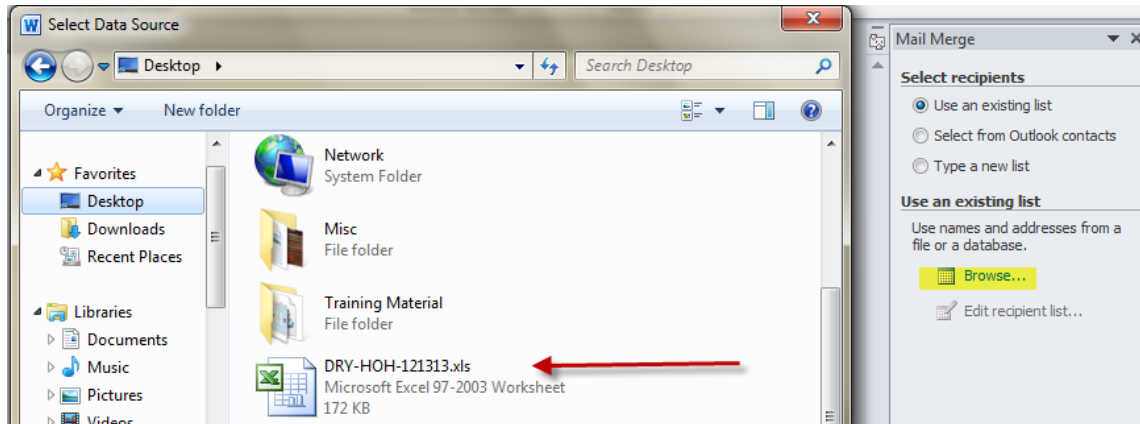
**E-mail messages**

Send e-mail messages to a group of people. You can personalize the e-mail message that each person receives.

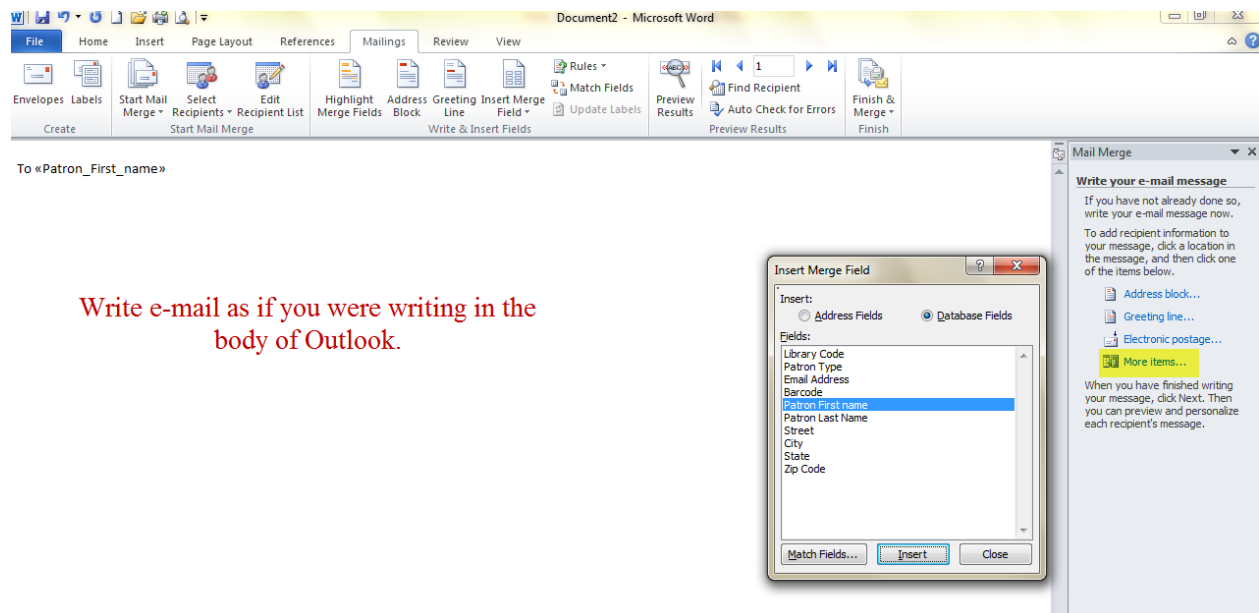
Click Next to continue.

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

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



**Step Three:** 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.

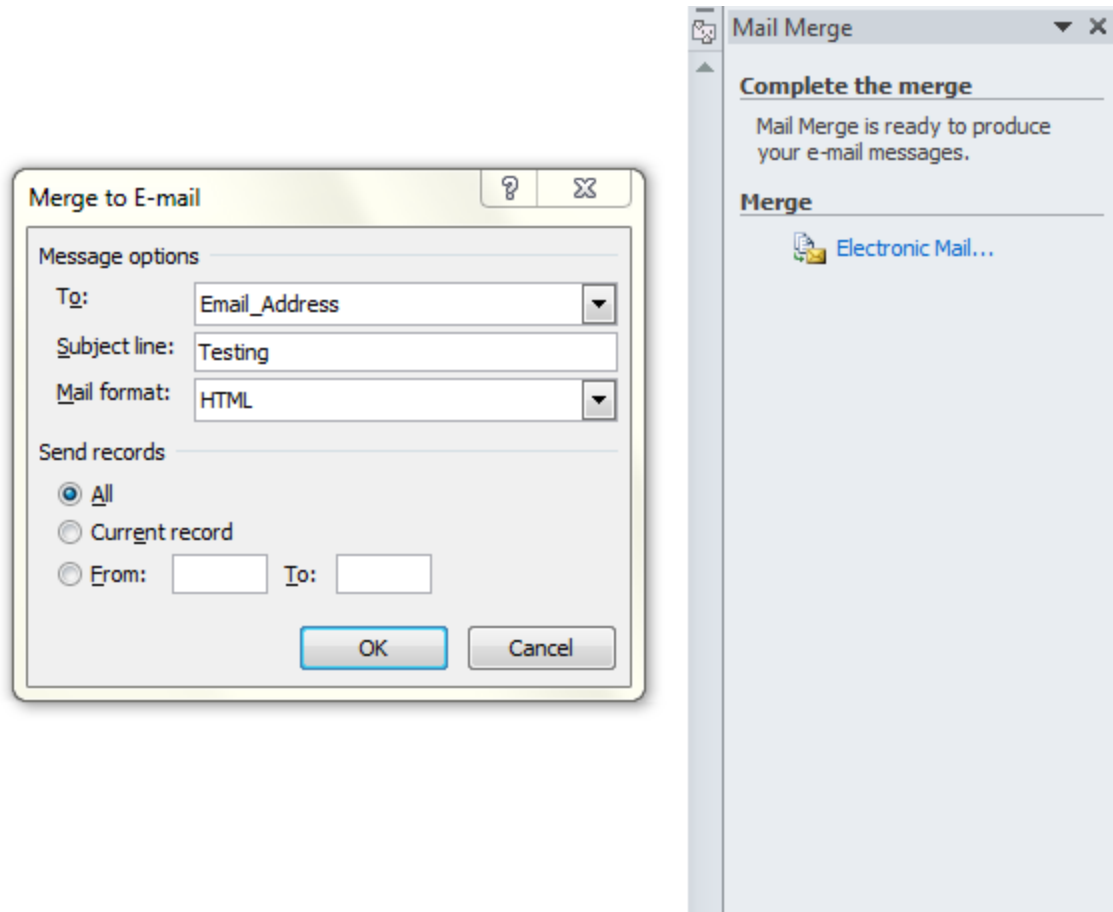


Write e-mail as if you were writing in the body of Outlook.

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

**Step Four:** 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.



**Step Six:** 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.