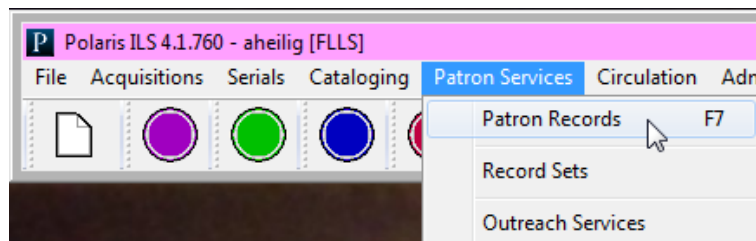


## FAQ:

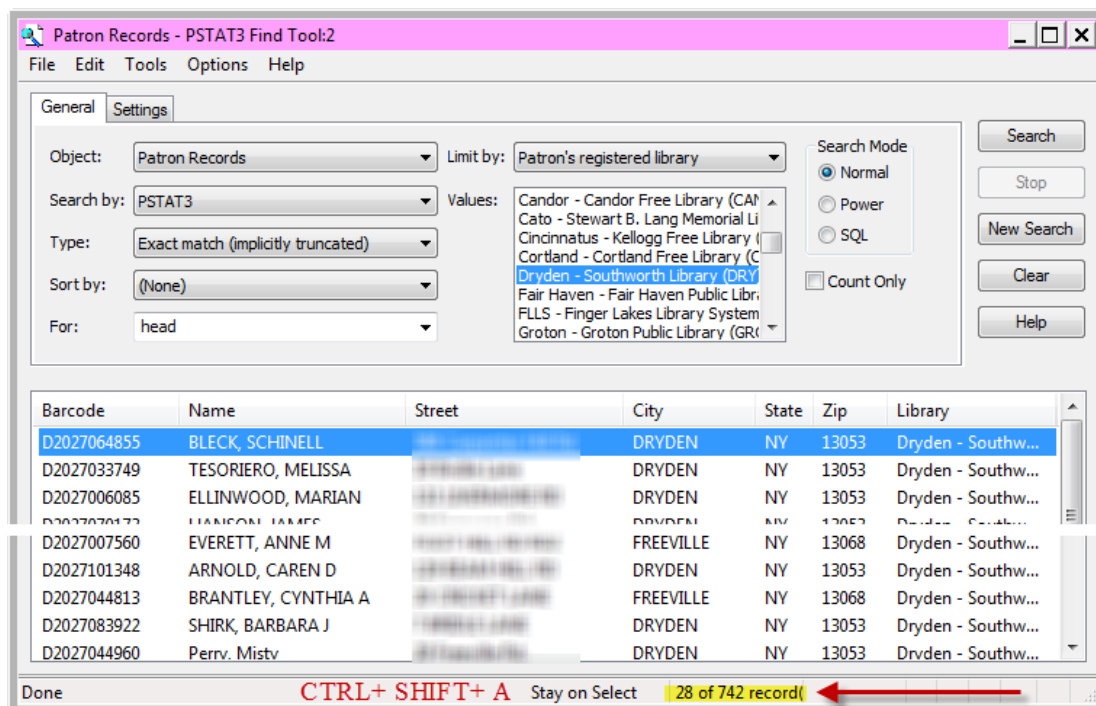
### How to create mass mailing with Mail Merge and Patron Record Set- Polaris, Excel, Microsoft Word 2010

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.

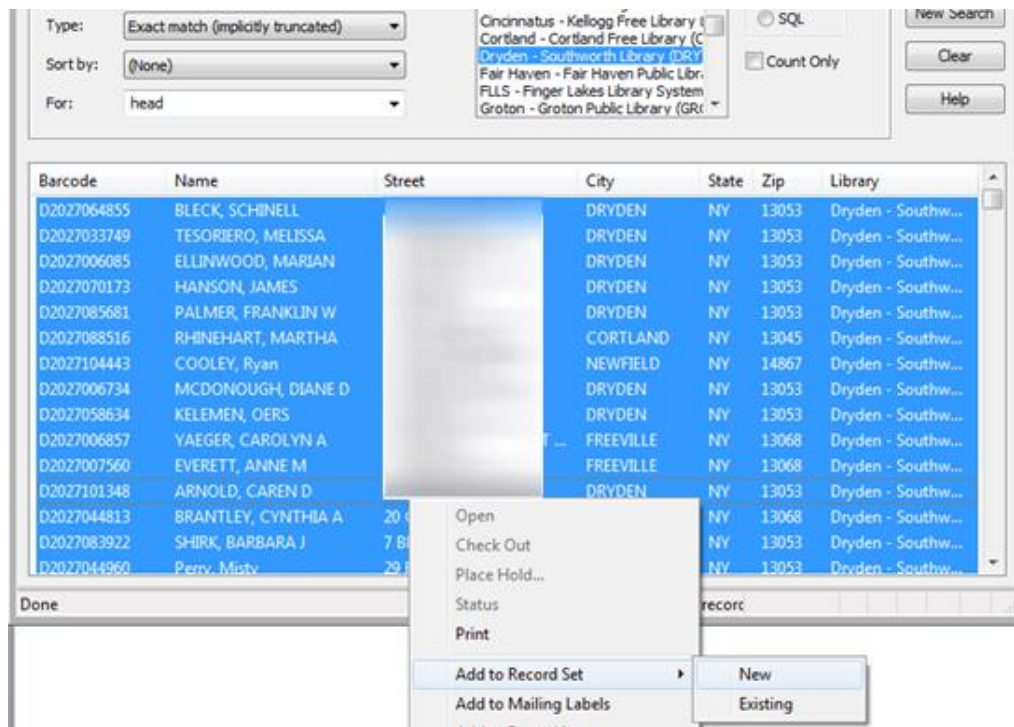


**Step Two:** Search by preferred parameters. For this example, we used the *PSTAT3* field to isolate those patrons who were listed as the head of household in their residence. You could substitute for any field to suit your intended targets. You can narrow your results by using the limit by bar to concentrate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

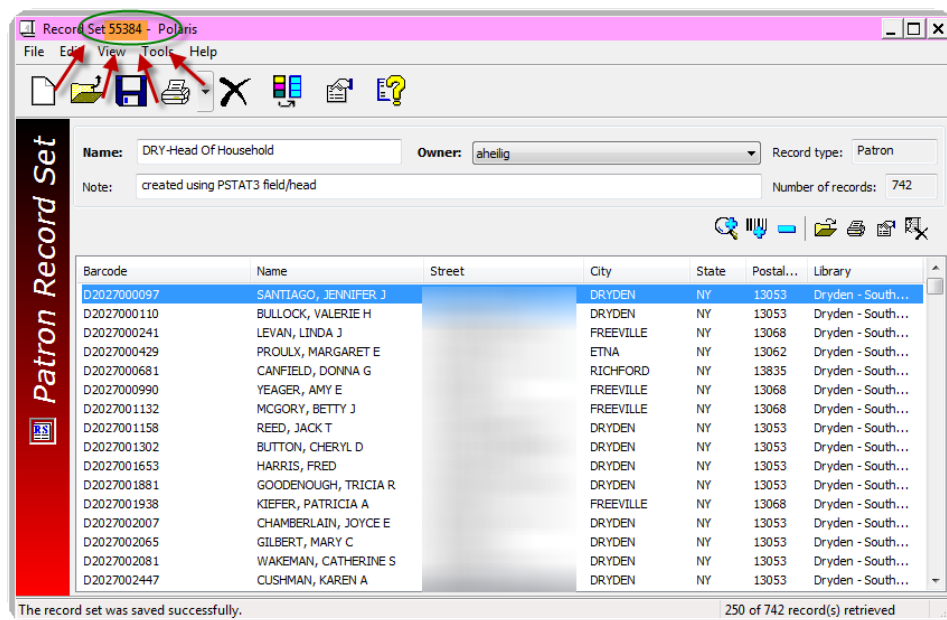


Remember to press **CTRL + SHIFT + A** to access all the records that were found.  
**If not, you will not be able to select all of them.**

**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**.



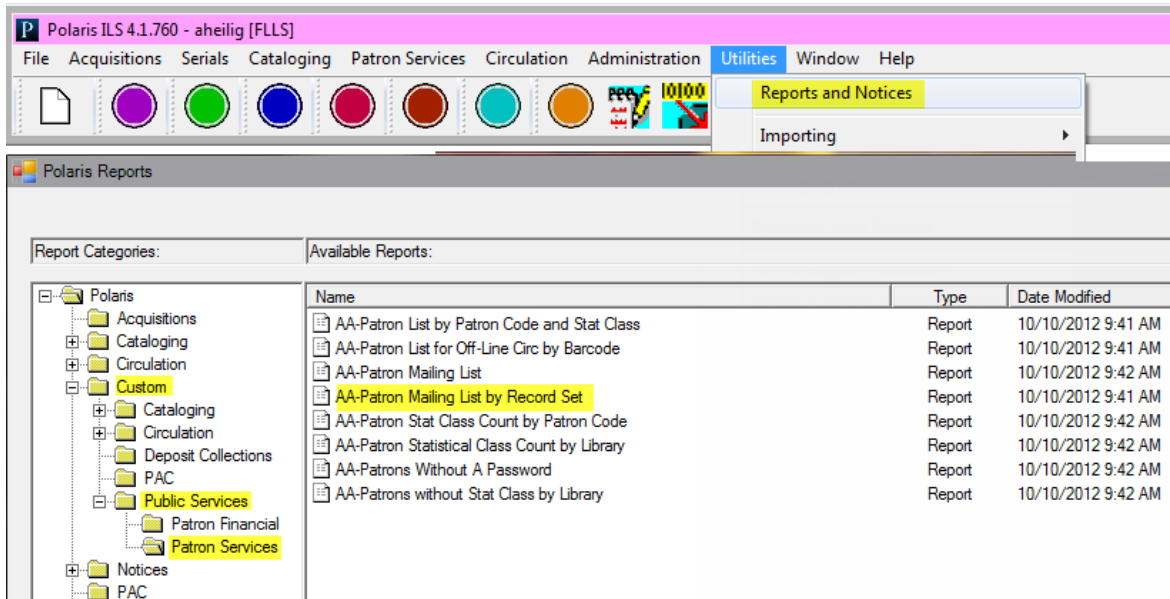
**Step Five:** Create an Excel file containing your new **Patron Record Set**.

In the Polaris Toolbar, click on:

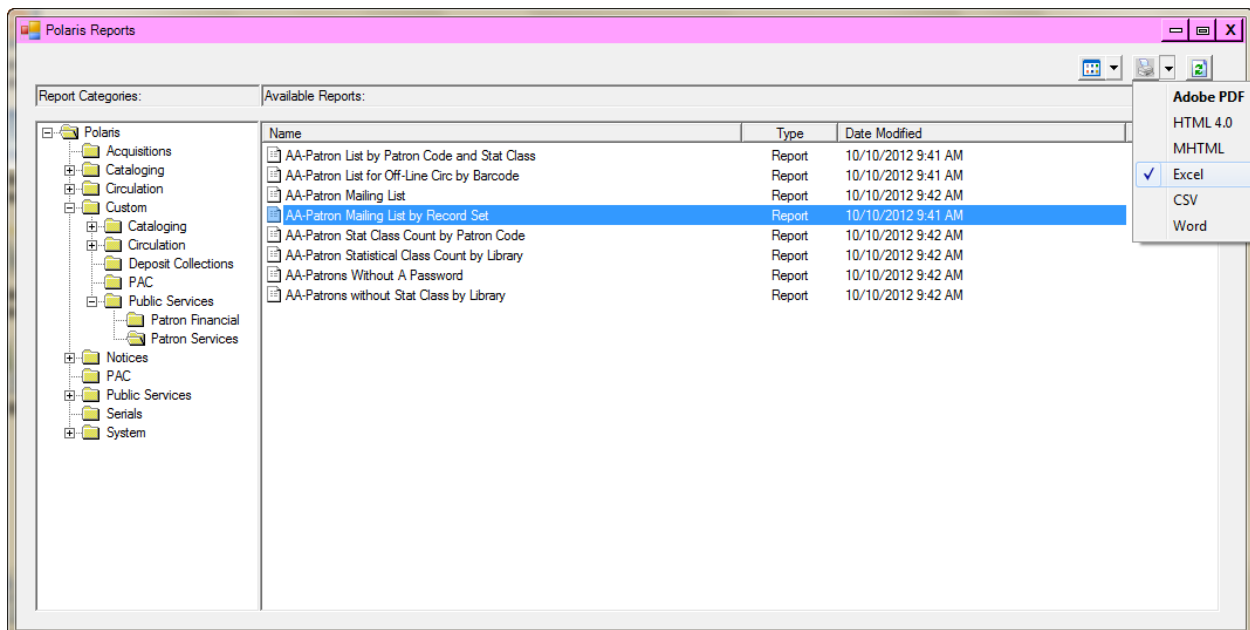
**Utilities → Reports and Notices**

(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.

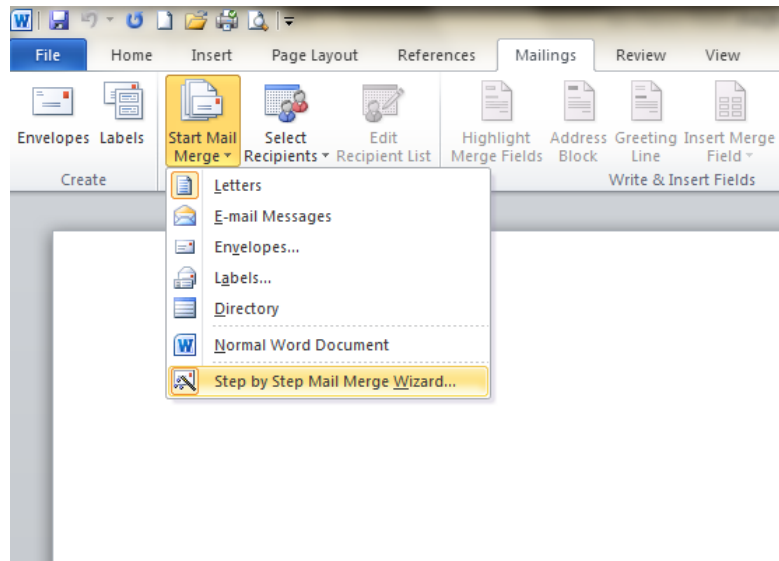


**Step Six:** Use the *Patron Record Number* to generate the Excel file and then save to an appropriate file.

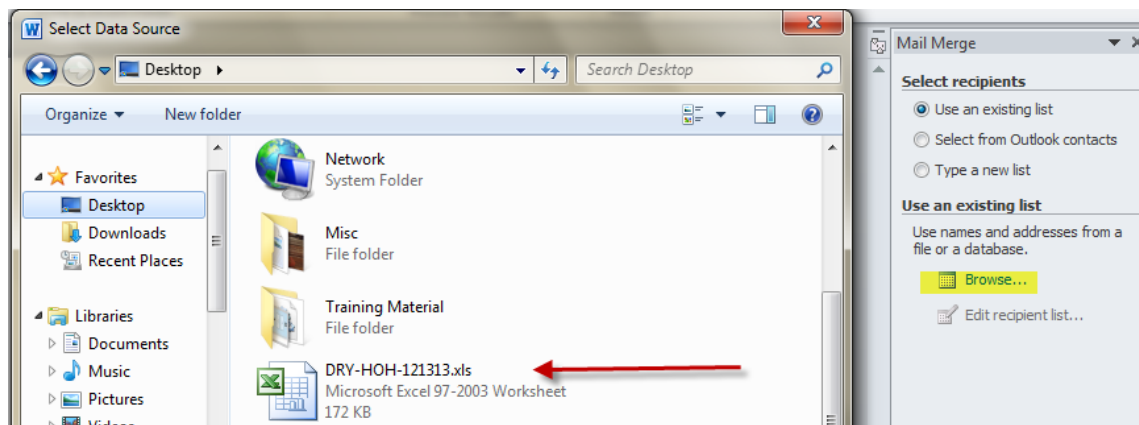
**You are now ready to use Microsoft Word 2010 to use the Mail Merge feature to create labels, envelopes, etc.**

## Microsoft Word 2010 Mail Merge

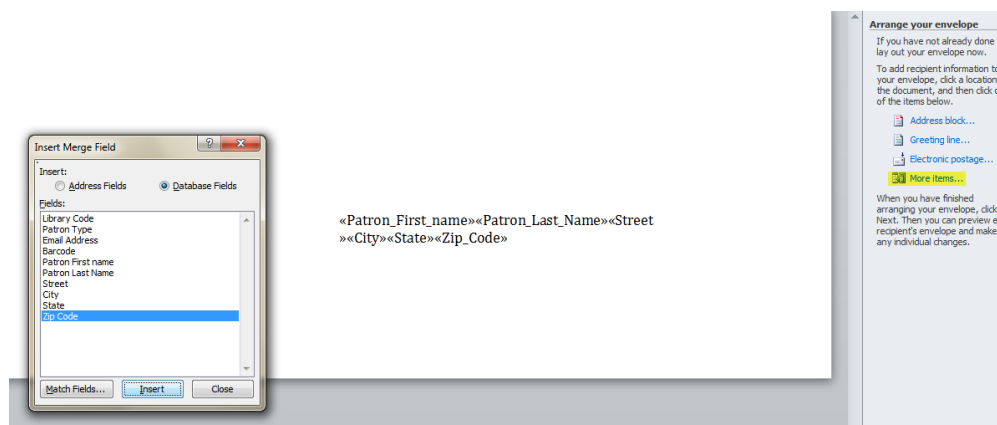
**Step One:** After opening your Word document, select the **Mailings** tab at the top. Click on the **Start Mail Merge** icon then select the **Step by Step Mail Merge Wizard**.



**Step Two:** On the right hand side, select which item you would like to use, and follow the template to select the size of the item you are wishing to create. When prompted to select recipients, **Use an existing list**, and **Browse** to find your **Excel Patron Record Set**.

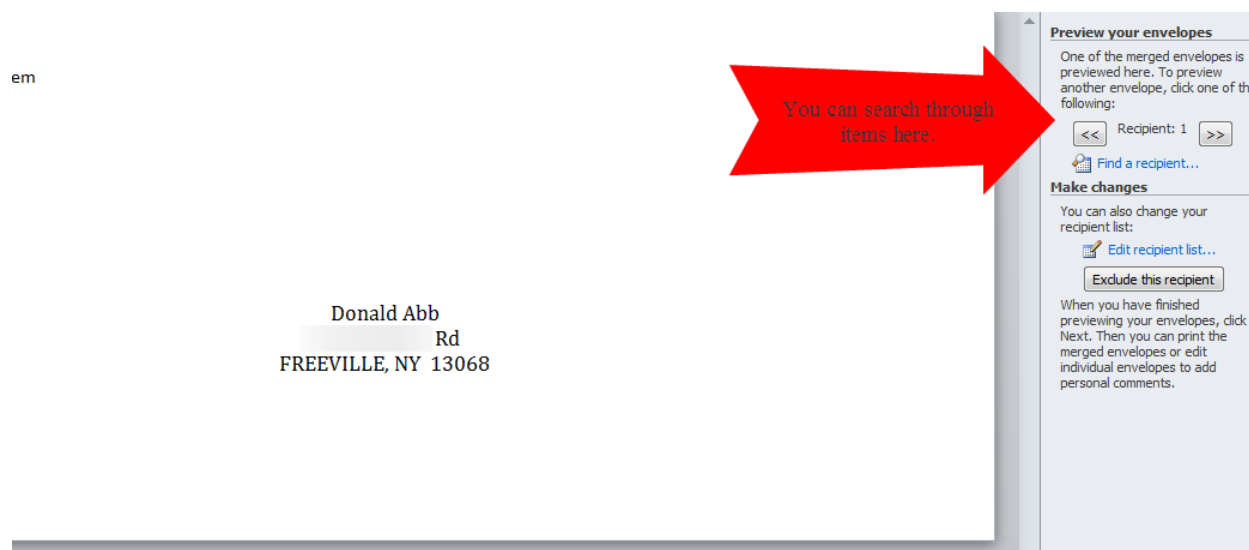


**Step Three:** Move on to step four of six of the template to arrange your envelope. Click on the text box where you would like to add the Patron Record Set information, and select more items under the Arrange header.



Note: You can edit the placement of the data so it resembles the format that you need.

**Step Four:** By going to the next step of the template, you will be able to see if the data transferred correctly.



**Step Five:** If satisfied with the results, follow the prompts to print.

#### Notes:

- Use this technique to target groups for reading groups, programs, and other events that does not require a full mailing to your district
- Save lists to contact lists easier to access