

HOW TO MERGE MAILING DATA into FORM LETTERS from CDSCOPE2000 - Summary

- 1) SEARCH for the properties you want to mail to the owners or occupants of.
 - In CDSCOPE2000, click *Searches, Create new property search* and then *Next*.
 - Fill in some search criteria clicking *Next* as you step through the various criteria groupings.
 - Type in a name for your search and click *Search*. Click *Next*. If asked, don't save the active list.

- 2) A MAILING LABELS file now needs to be created & exported containing the details for these contacts.
 - Click *Mailing Labels, [Property Owners -or- Cityscope Occupants]* and then *Next*.
 - Select your label preferences, then click *Next*. Click *Next* again.
 - Select *Export Label To A File* then *Microsoft Excel*.
 - The *Destination Directory* is where on the computer your merge file (Excel File) will go.
 - The *Destination File* is what the merge file (Excel File) will be called. Click *Finish*.
 - Click *Build Labels*. Once the "labels" appear click *Output Labels*. Click *OK*.
 - ✦ Make a note of these, you will need them later.

- 3) Open a blank document in MICROSOFT WORD to create your Mailing Labels.
 - In Word 2000, click *Tools, Mail Merge, Create, Form Letters, Active Window, Get Data, Open Data Source*.
 - Next to *Files of Type* select *MS Excel Worksheets*.
 - Navigate to the *Destination Directory* you selected back in CDSCOPE2000.
 - Select the Excel file that you entered under *Destination File* back in CDSCOPE2000. Click *Open*.
 - Entire Spreadsheet will be selected. Click *OK*. Click *Edit Main Document*.
 - Now you can start typing your letter. A new toolbar will have appeared up the top. Insert merge fields throughout your letter as you see fit, example:

«ContactTitle» «ContactFirstName» «ContactSurname»
«ContactPosition»
«Addressee»
«Address»
«Suburb» «State» «PostCode»
«Country»

Dear «ContactTitle» «ContactFirstName» «ContactSurname»,

Insert letter contents here...

- Note: There may be some companies where we do not have a contact. This would result in the above letter reading "Dear ,". To counter this, you can add conditions to the merge fields, meaning:
 - If a contact title does exist then put it in.
 - If a contact title does not exist, then put "sir/madam".For instructions on how to do this, please see our tutorial for *Advanced Mail Merging*.
- Once you have finished your letter, click the *Merge To Printer* button. 