

Using Mail Merge Templates

EXPORT FROM BREEZE

1. Open Breeze and select **More>Forms**
2. Select **View Entries** below the name of the 2020-2021 Student Reg Form, or select the grey box with the number of forms to the right of the form name
3. Select **Download as Excel**
4. When the Excel document opens, do not make any changes to the spreadsheet. Just close the spreadsheet. It is automatically saved in your **Downloads** folder.

NOTE: When downloading from Breeze, all downloads automatically go into your Downloads folder on your computer. You may want to delete these every once in a while.

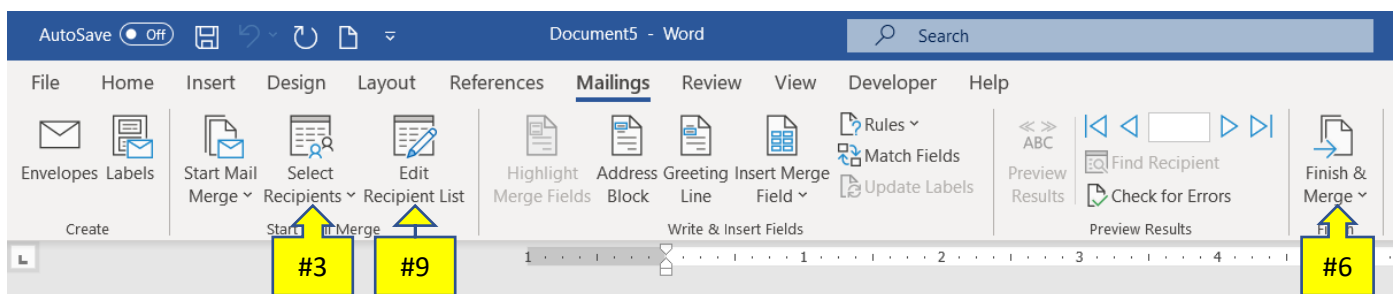
CREATE YOUR DOCUMENT

NOTE: When using Mail Merge templates, feel free to change anything you would like to on the template itself. Be sure to save the template with your changes for future use. Use **Insert Merge Field** to add fields.

1. After exporting from Breeze, open the Mail Merge template (Be sure to use the correct one – either Online or In-Person)

NOTE: When opening a Mail Merge template, you may see a pop-up window that says “Opening this document will run the following SQL command:” Select the X to close the box, or select No, then proceed with the instructions below.

2. Select **Mailings** on the Word menu
3. Open **Select Recipients** and choose **Use an Existing List**
4. In the pop-up window, locate your Excel document, then double-click to select it
5. Select OK on the **Select Table** pop-up
6. Select **Finish & Merge** from the Word>Mailings menu and choose **Edit Individual Documents**
7. Select OK on the pop-up box.
8. Save your new Word document, then print it (**DOUBLE-SIDED for In-Person**) for your club binder. *Be sure to keep up with any changes you make to the student profiles in Breeze on these pages.



9. If you need to choose individual names before merging, select Edit Recipient List to the right of Select Recipients. This will open the full list of names. Uncheck any names you don't want to merge, then select OK. You can now continue with #6-8 above.