

# How to Mail Merge a file with Microsoft Word 2003

February 2005

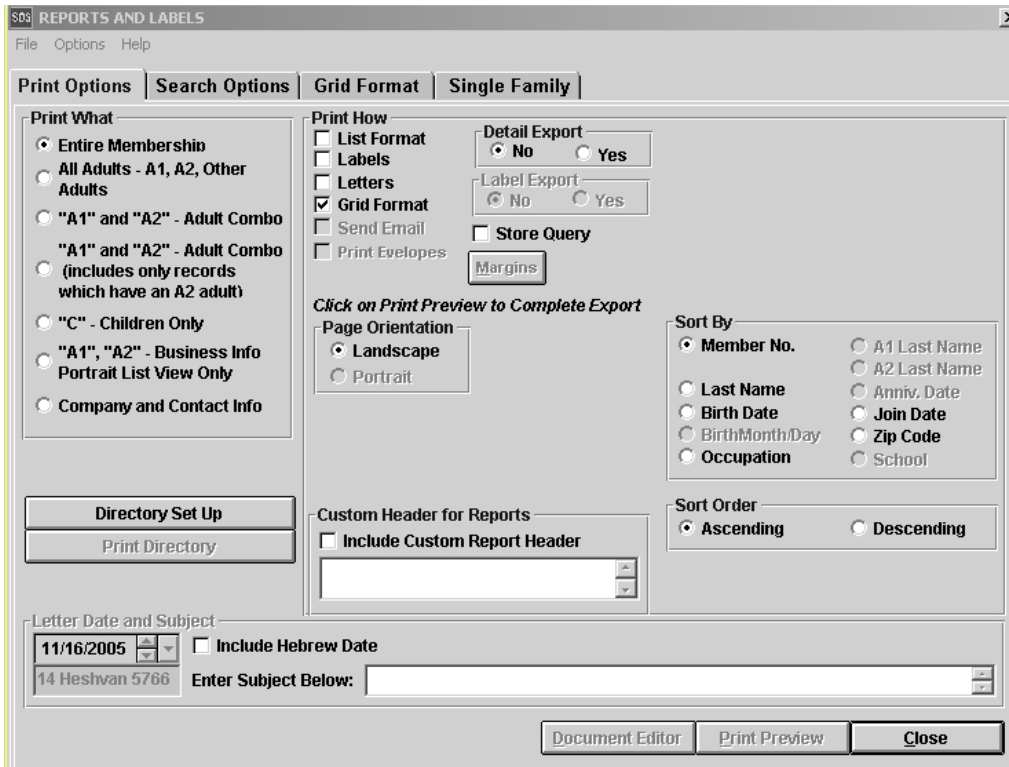
**How to create a query in SOS, export the report to a Text file and then use the report to do a mail merge with Microsoft Word 2003 . The same example applies to any of the export options from within SOS.**

Throughout the SOS program, you have the option to export the report to a text file. This SOS quick Tip, will take you through the steps to create a custom query, export it to a file and then mail merge the file with a Microsoft Word document.

The report required is to be able to send a Custom letter, to only the A1 members that are Active members and live in zip code 02000 to 02200.

## Create Query and Export Results

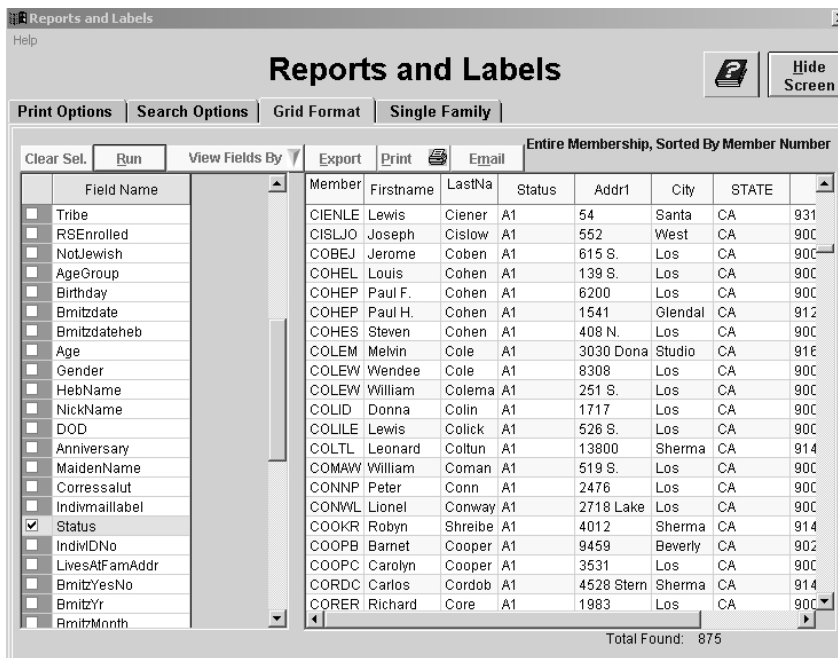
- 1: Open **SOS** and click on **Reports and Labels**.
- 2: In the Print What Option, click on Entire membership
- 3: In the Print How option, click on Grid Format.



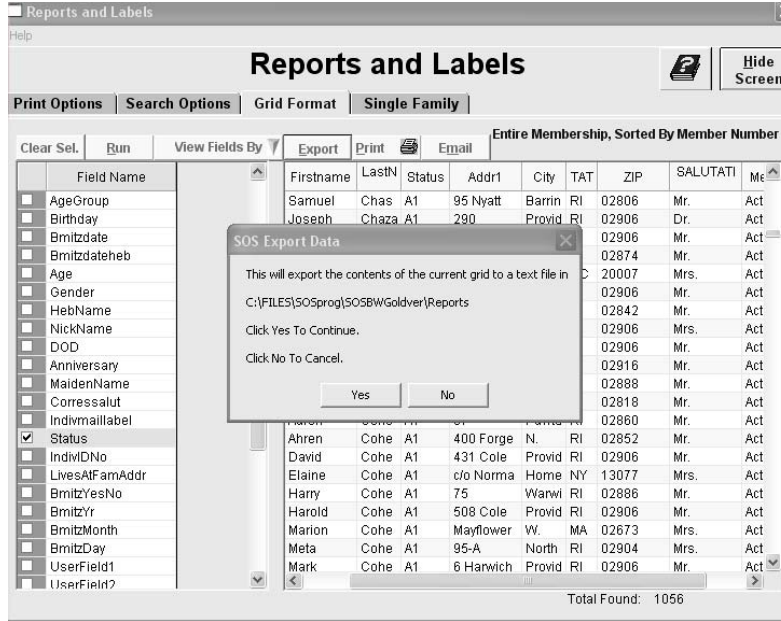
- 4: Click on the **Search options Tab**.
- 5: Click on **Member Types** and select Active (This may vary depending on your situation)
- 6: Click **Zip Code** and enter from 02000 to 02200
- 7: Click on **Family Status** and select A1



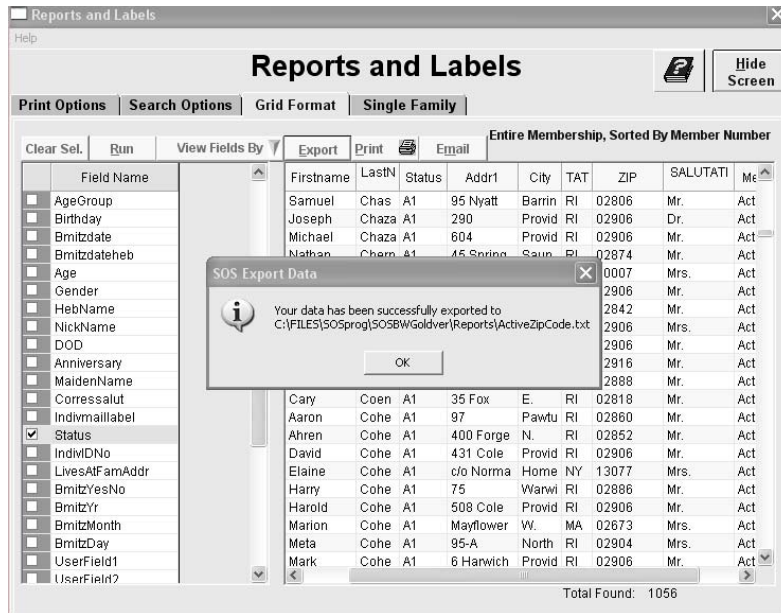
- 8: Click on Grid Format tab
- 9: Under Field name, select the following Fields  
 First Name , Last Name , IndividualMailLabel, Status, Addr1, City, State, Zip, Salutation, MemType, then click Run and the Excel Type grid will populate.



- 10 Click on Export, make a note of the folder name displayed  
The default is the folder that SOS was installed to on your PC such as  
C:\SOSprogram\Reports



- 11 Click Ok and then enter a file name that reminds you of the query /report just run.



12: The report has now been created.

13 The next step will be to open word create a letter and merge with the SOS report

## Merge file with Word

1: Open Word

2: Click on tools, then Letters and Mailings, then Mail merge

Please note that some of options may vary depending on the version of word you are using  
This document is based on Word 2003

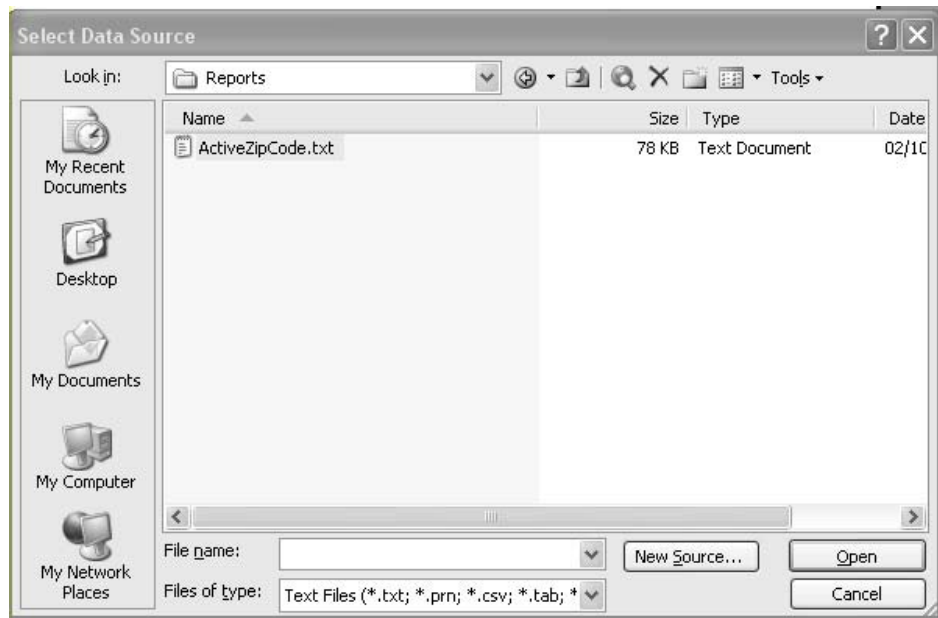
3: Click on Starting Document

4: Enter what you want the letter to say.

5: Select recipients

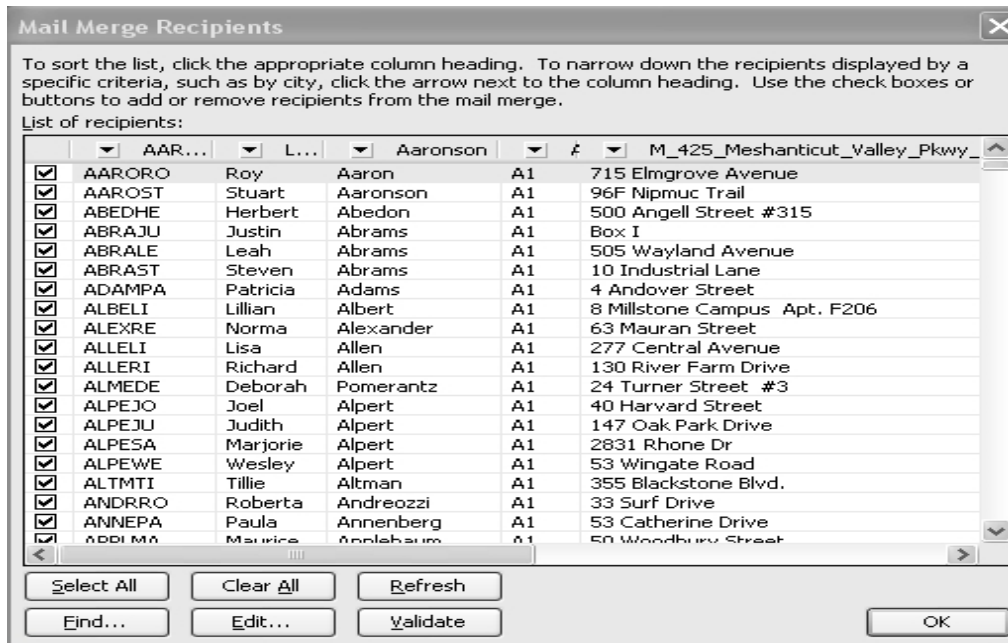
6: Then select use an existing list and then click browse

7: You will need to use the next window to navigate to the folder that you saved the file (see item #11 in the setup query report) also change the file type to text files



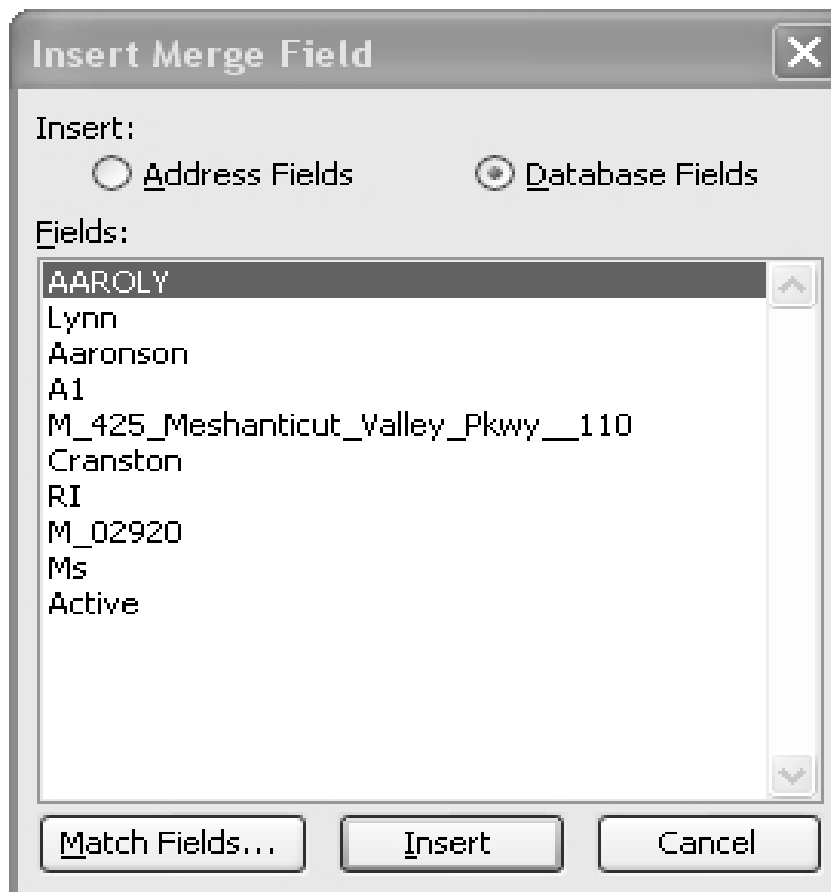
8: When the file is found, highlight it and click open.

9: In the mail merge recipients' window, be sure all records are checked then click ok.



10: Place the cursor in the letter where you want the address to display

11: Click on more items and select Database fields. The list will show the results (not the field names) of the first record in your query



12: Highlight a field then click insert.

13: You may have close the Insert Merge Field and move the cursor to the next location, then redo the process, to place the fields in the correct location.

14: Once complete, click Preview your letter

15: Then click Complete the merge

16: When you click Edit Individual Letters, you have the option to merge all records to a new document, or select a record number to merge.

17: Select All, will place all records in print preview, where you can print individual records and the entire range.

You have just completed the export of a custom Query from SOS and merged the file with a custom letter in Microsoft Word 2003. The total time the process should take is about 5 to 10 minutes, depending on the length of your letter.

The same process applies if you are using the Export report, from any of the SOS options.

Some of the options may vary, depending on the version of Word currently installed.

SOS continues to be enhanced through user comments and ideas. Please email your suggestions to [SoSSupport@ansintech.com](mailto:SoSSupport@ansintech.com) or [SoSrequest@ansintech.com](mailto:SoSrequest@ansintech.com)

For more details about SOS visit our web site at  
[www.ansitech.com](http://www.ansitech.com)

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Technical support toll free number is 1-866-322-4539

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