

Option 1: Microsoft Mail Merge: How-to Guide (Letter)

What you'll need:

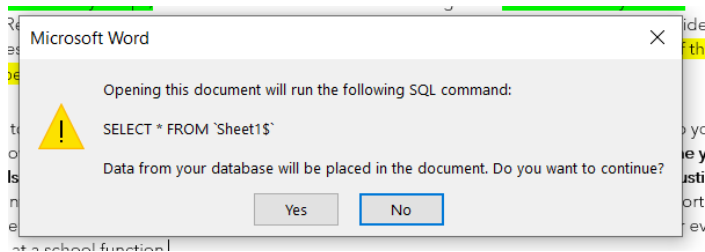
- o Letter template (provided by Salvos Schools)
- o Excel spreadsheet containing recipient information

Please note that Mail Merge is most helpful when sending letters or emails to several schools.

Part 1 – Personalize your letter

Open the letter template provided by Salvos Schools.

NOTE: If you see the below message, click "no"



To personalize this letter, please fill in all of the sections highlighted in yellow (and edit the sections in red) with information specific to your Corps and region.

Schools enjoy being able to know how the Salvos are supporting those in need locally, so it's great to give them a snapshot of the incredible work you're doing (and how their support will help!).

Feel free to edit the letter to suit your voice and adapt the ask to suit your setting.

Part 2 – Mail Merge

Now that you've personalized your letter, all that is left is to Mail Merge the school name into your letter, ie the green highlights will be filled by using Mail Merge.

Step 1 – Prepare your spreadsheet

Before you can start your Mail Merge, please make sure you have access to the list of schools for your Corps area. If you do not already have access to this, please contact your local Salvos Schools representative.

The list might look something like this:

	A	D	AE	AF	AG	AH
1	School Name	Suburb	Category	Type	Coed/M/F	Low Rang
2	Guilford Young College	Hobart	Catholic	Combined	Boys	K
3	St Mary's College	Hobart	Catholic	Combined	Coed	Prep
4	St Virgil's College, Junior Campus	Hobart	Catholic	Primary	Boys	Y03
5	St Michael's Collegiate	Hobart	Private	Combined	Girls	Prep
6	St Michael's Collegiate School	Hobart	Private	Combined	Girls	Y05
7	Albuera Street Primary School	Hobart	Government	Primary	Coed	K
8	Campbell Street Primary School	Hobart	Government	Primary	Coed	K



Step 2 – Open the letter in Microsoft Word and prepare your Mail Merge

NOTE: Please ensure you open the letter in the desktop app and **not** the online version of Word.

Open the letter template provided by Salvos Schools – it should look like the below screenshot (but longer).

Dear «School_Name»,

I write to you on behalf of [Salvos Name]. Our Salvation Army expression provides local social and community services to those in [region]. I am writing to you with a warm invitation for «School_Name» to partner with us in 2026. [Remove if not applicable: Thank you for your support of The Red Shield Appeal in 2025]. Next year, we have a range of opportunities for students to take part in some of our local [initiatives](#) and we would also like to offer our support to your school community. Please, reach out to us to discuss how we might be able to come alongside your school for community engagement and service-learning opportunities or to support to your families.

Highlighted in green in the screenshot below are examples of the Mail Merge fields in the letter that will change when you add your mailing list.

Dear [School_Name],

I write to you on behalf of [Salvos Name]. Our Salvation Army expression provides local social and community services to those in [region]. I am writing to you with a warm invitation for [School_Name] to partner with us in 2026. [Remove if not applicable: Thank you for your support of The Red Shield Appeal in 2025]. Next year, we have a range of opportunities for students to take part in some of our local [initiatives](#) and we would also like to offer our support to your school community. Please, reach out to us to discuss how we might be able to come alongside your school for community engagement and service-learning opportunities or to support to your families.

To add your mailing list, go to:

- “Mailings” at the top of your word document
- “Select Recipients” then “Use Existing List...” and select your mailing list from wherever you have saved it. There should be no visible change to your word document
- Select “Preview Results” to see if the import of the list has worked. Please see an example of what it should like:

Dear [Howrah Primary School],

I write to you on behalf of [Salvos Name]. Our Salvation Army expression provides local social and community services to those in [region]. I am writing to you with a warm invitation for [Howrah Primary School] to partner with us in 2026. [Remove if not applicable: Thank you for your support of The Red Shield Appeal in 2025]. Next year, we have a range of opportunities for students to take part in some of our local [initiatives](#) and we would also like to offer our support to your school community. Please, reach out to us to discuss how we might be able to come alongside your school for community engagement and service-learning opportunities or to support to your families.

**make sure nothing is left highlighted in green, yellow or red text at the completion of this step.*

Step 3 – Print and/or save your Mail Merge letters

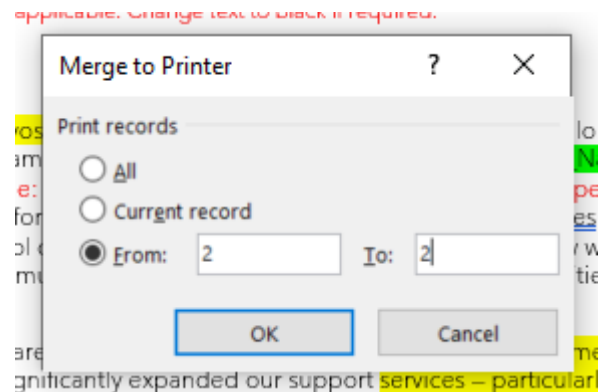
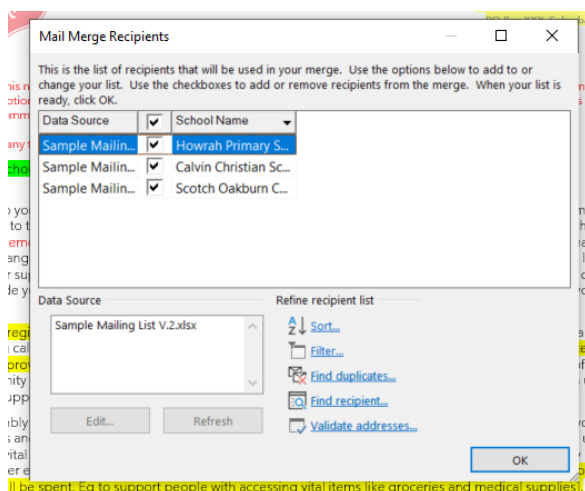
STOP! Before printing, ensure all highlights have been removed from your letter.

To print physical copies of the letters:

1. "Mailings"
2. "Finish & Merge"
3. "Print documents..."
 - a. Print "All" OR
 - b. Indicate specific recipients to print.

To do this, open "Edit Recipient List" and note the number of the recipient in the list. For example, in the screenshots below, if I just wanted to print Calvin Christian School's letter, I would print recipient "2". If I wanted to print Calvin and Scotch Oakburn, I would print "2" to "3".

 - i. Under "Edit Recipient List" you can also deselect recipients so they are not included in the mail merge (this does not edit the original spreadsheet).
4. You should then be prompted to print the letters.



To email a copy of the letter to each school:

NOTE: When printing to PDF, it **will not** save each letter individually – you will need to do this manually. To save each letter:

1. Under "Edit Recipient List" you can also deselect recipients so they are not included in the mail merge (this does not edit the original spreadsheet).
2. Deselect all recipients by clicking on the arrow at the very top of the list (refer to screenshot above on the left hand side).
3. Select **one** recipient.
4. "Mailings"
5. "Finish & Merge"
6. "Print documents..."
7. Print "All"
8. On the next page, to save the letter for emailing, ensure you select "Microsoft Print to PDF" where you choose your printer and save each letter in a designated folder. Save using a recognisable file name eg. Invitation Letter – Howrah Primary School
9. Email each school individually and attach the invitation letter as an attachment



Option 2: Use MailMerge to Create Emails and send direct to schools through Outlook

- Pro: Very quick and efficient way to contact schools
- Con: Increased margin for error. Emails are automated to schools and there is little opportunity to correct any incorrect contact details etc

Instead of attaching the letter template to emails to schools, you can use the template as the body text of an email and use MailMerge to send direct emails to schools.

Watch the tutorial here: <https://youtu.be/W7SbDxeR2K0?si=h7d3KGHsmToCKhcn>

