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Overview

This article walks through the steps to perform **mail-merge (letter writing)** with **Trail Blazer** and **Microsoft Word**.

You can utilize this integration for letters, envelopes, labels, etc. There are many benefits to this, such as the ability to create letter templates with multiple columns, text wrapped around images, and much more. Another benefit would be the ability to print to whatever type of label paper you're using.

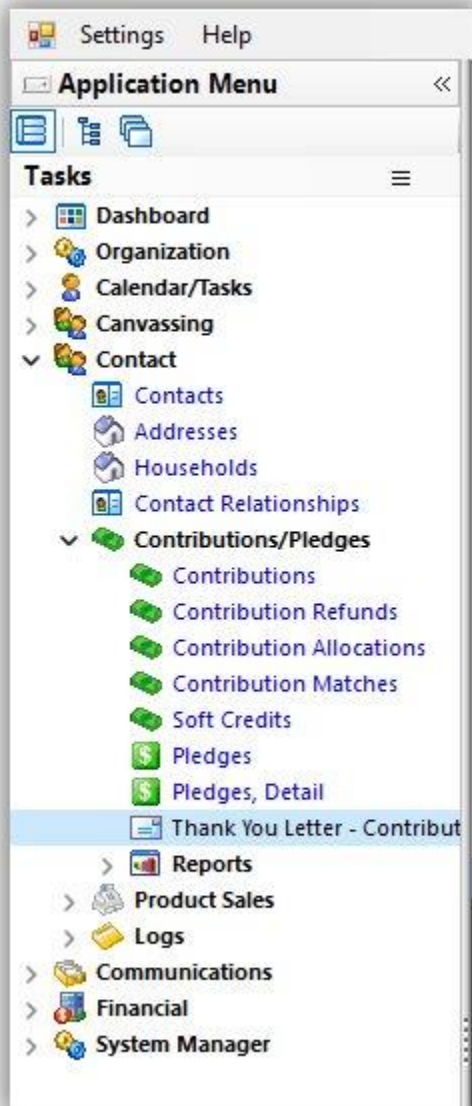
This integration allows you to merge-in any data point that you are tracking in your database e.g. name, address, donation date, donation amount, ask amount, nickname, household name, etc.

Prefer video? [Click here](#) to watch a video tutorial.

 **Tip:** Creating custom "[mailing formats](#)" will help streamline this process.

Steps

Navigate to the list that you want to run a mail-merge print from. *In this example I used the Thank You Letter – Contributions list.*



Run a targeted [search query](#) for the contacts that you want to print for. *In this example I searched for donors that needed a thank you letter.*

Run a search for the contacts that you want to do a print for.

The screenshot shows the TrailBlazer software interface. At the top, there is a search bar with 'Search' and 'Count' buttons, and a 'Reset' button. Below this is a navigation menu with tabs for 'Favorites', 'General', 'Memory/Honor', 'Other', 'Gateway', 'Contact', 'Control', and 'SQL'. The 'General' tab is selected. The search criteria are set to '<Custom, according to dates below>'. Other filters include 'Products: <ignore>', 'Recurrence: <ignore>', 'Deductibility: <ignore>', 'Exclude Event: <ignore>', and 'Alloc. Fund: <ignore>'. A checkbox for 'Exclude thank-you-not-needed contacts' is checked. Below the search criteria, there are buttons for 'Edit', 'Sort', 'Format', 'Wrap', 'Export', 'Print', and 'Pivot'. The results table is titled 'Thank You Letter - Contributions [3 records found]' and contains the following data:

	<input checked="" type="checkbox"/>	Last Name	First Name	Date	Amount	Thank You Letter Sent	Street	City	State	Zip Code	Payment Method
	<input checked="" type="checkbox"/>	Bushman	Kenneth	12/11/2021	1,000.00	<input type="checkbox"/>	4432 Logan Ave N	Minneapolis	MN	55412	Credit Card
	<input checked="" type="checkbox"/>	Applekamp	Gregory	12/7/2021	75.00	<input type="checkbox"/>	1810 3rd Ave S	Minneapolis	MN	55404	ACH
	<input checked="" type="checkbox"/>	Brochin	Joseph	12/1/2021	500.00	<input type="checkbox"/>	3117 24th St E	Minneapolis	MN	55406	Check
	<input checked="" type="checkbox"/>	3			1,575.00	0					

Next, and **very important**, you will need to **format** (add / remove columns) ([learn how to format](#)) into the grid that you want to use a **merge fields** in your printing. Some common examples for this would be:

- Title
- First name / last name
- Address (street, street 2, city, state and zip code)
- Contribution date
- Contribution amount
- Contribution fund name
- Contribution event name
- Household salutation name
- Household envelope name

My example is below.

The screenshot shows the TrailBlazer software interface. At the top, there is a search bar with options like 'Search', 'Count', 'Reset', and 'New'. Below this is a navigation menu with tabs for 'General', 'Memory/Honor', 'Other', 'Gateway', 'Contact', 'Control', and 'SQL'. The 'General' tab is active, showing various filters for 'Date Range', 'Cycle', 'Event', 'Amount Range', 'Batch Code', 'Products', 'Recurrence', 'Deductibility', 'Exclude Event', and 'Alloc. Fund'. A checkbox for 'Exclude thank-you-not-needed contacts' is checked.

Below the filters is a toolbar with icons for 'Edit', 'Sort', 'Format', 'Wrap', 'Export', 'Print', and 'Pivot'. The main area displays a table titled 'Thank You Letter - Contributions [4 records found]'. The table has columns for 'Date', 'Last Name', 'First Name', 'Amount', 'Thank You Letter Sent', 'Street', 'City', 'State', and 'Zip Code'. Two red arrows point to the 'Amount' and 'Thank You Letter Sent' columns in the summary row at the bottom of the table.

	Date	Last Name	First Name	Amount	Thank You Letter Sent	Street	City	State	Zip Code
<input checked="" type="checkbox"/>	12/1/2021	Brochin	Joseph	500.00	<input type="checkbox"/>	3117 24th St E	Minneapolis	MN	55406
<input checked="" type="checkbox"/>	12/7/2021	Applekamp	Gregory	75.00	<input type="checkbox"/>	1810 3rd Ave S	Minneapolis	MN	55404
<input checked="" type="checkbox"/>	12/11/2021	Bushman	Kenneth	1,000.00	<input type="checkbox"/>	4432 Logan Ave N	Minneapolis	MN	55412
<input checked="" type="checkbox"/>	12/13/2021	Smith	Philip	50.00	<input type="checkbox"/>	22870 Sandy Dr NE	East Bethel	CT	06500
<input checked="" type="checkbox"/>	4			1,625.00	0				

Build a format that includes the columns of

You can then [save this format](#) for future use.

Double-check that you have **all of the columns** added to your format that you will **need for merging** into your letter.

Then select **File > Write Letter Using Microsoft Word...**

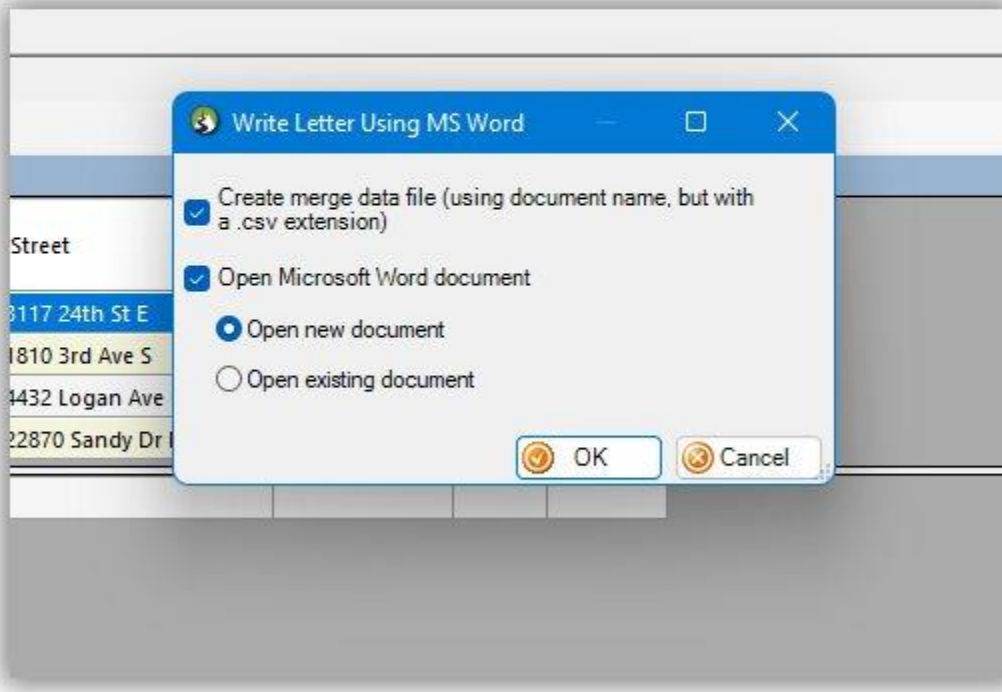
The screenshot shows the TrailBlazer software interface. The 'File' menu is open, and the option 'Write Letter Using Microsoft Word...' is highlighted. A red arrow points to the top of the menu. Below the menu, a table displays contribution records with columns for Name, First Name, Amount, Thank You Letter Sent, Street, City, State, and Zip Code.

Name	First Name	Amount	Thank You Letter Sent	Street	City	State	Zip Code
	Joseph	500.00	<input type="checkbox"/>	3117 24th St E	Minneapolis	MN	55406
mp	Gregory	75.00	<input type="checkbox"/>	1810 3rd Ave S	Minneapolis	MN	55404
	Kenneth	1,000.00	<input type="checkbox"/>	4432 Logan Ave N	Minneapolis	MN	55412
	Philip	50.00	<input type="checkbox"/>	22870 Sandy Dr NE	East Bethel	CT	06500
		1,625.00	0				

The **first time** you run a mail-merge through MS Word, check the box for:

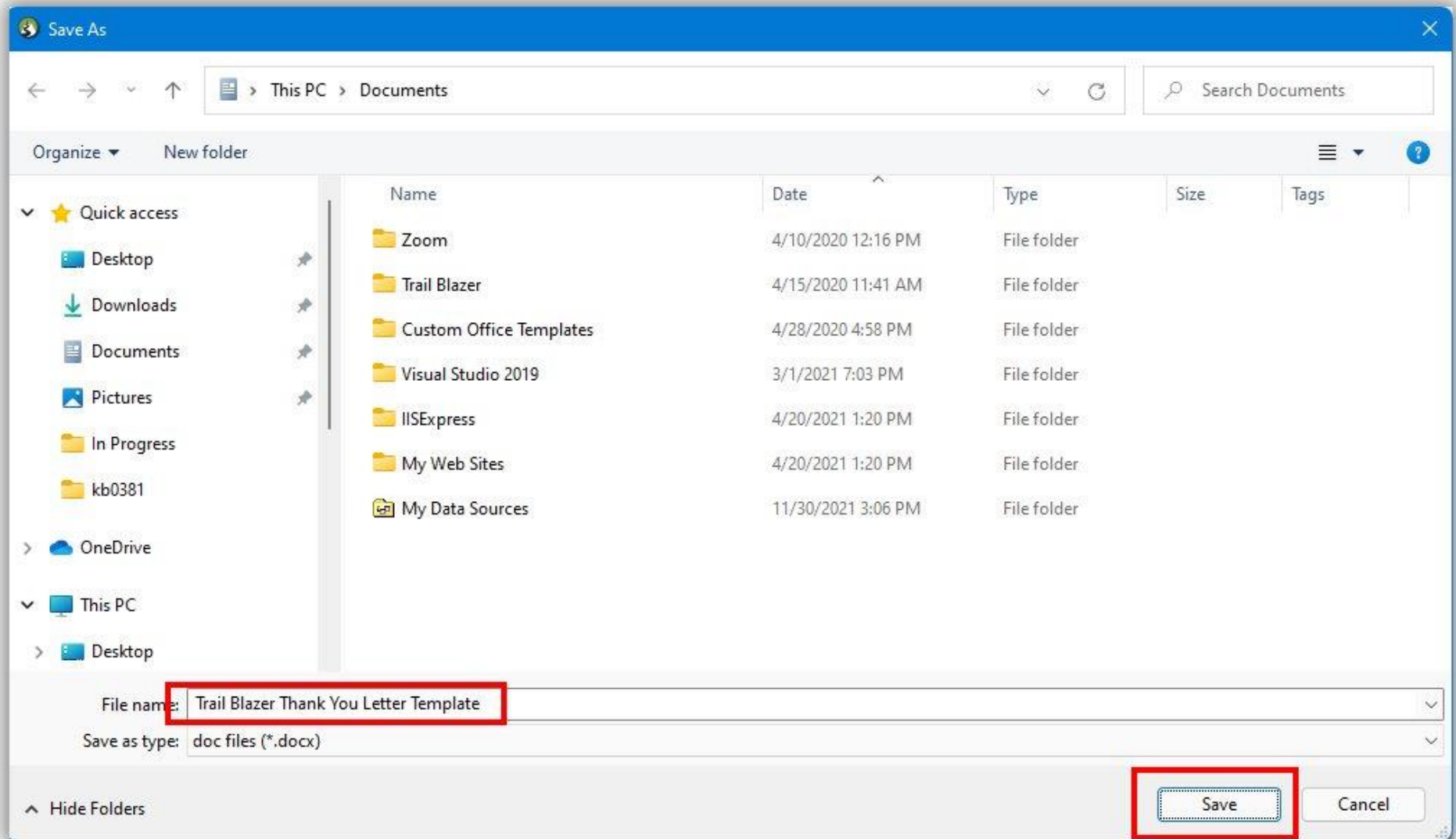
- Create merge data file (using document name, but with a .csv extension)
- Open Microsoft Word Document
 - o Open new document

Select these settings the *first* time you're printing.

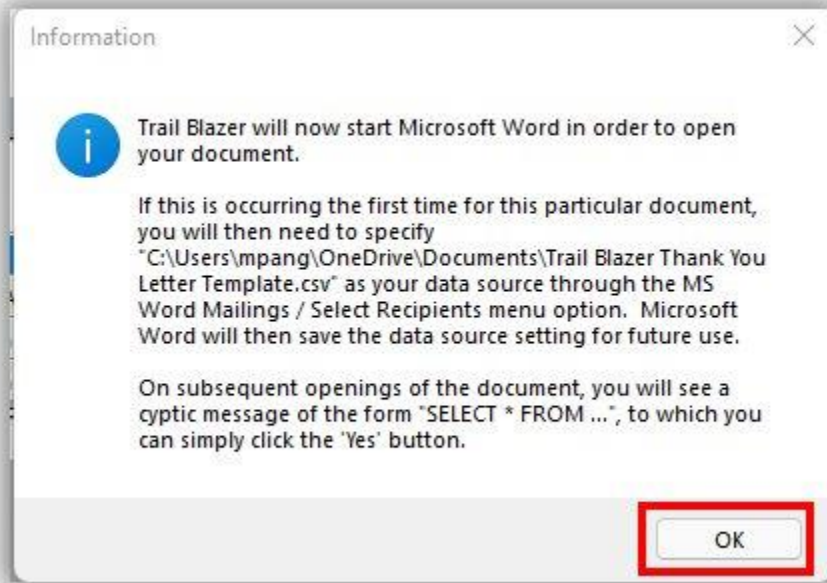


Choose the **file directory** for saving the .CSV export and the new Microsoft Word doc, give the files a **name**, and click **[Save]**. *In my example I used my Documents folder, and called the files "Trail Blazer Thank You Letter Template".*

Choose your file directory > provide a file name > click Save.



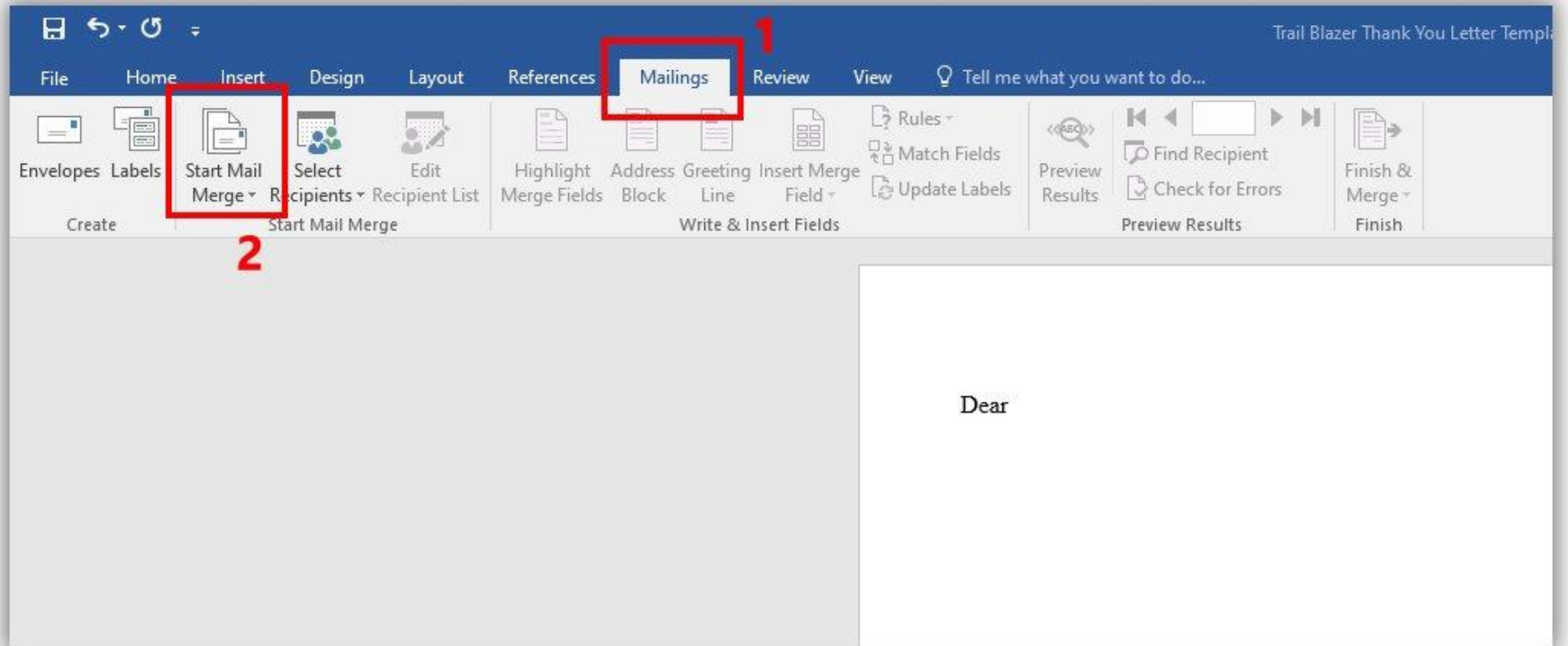
You'll receive a popup message with instructions for how to open the document. Click **[OK]** to proceed.



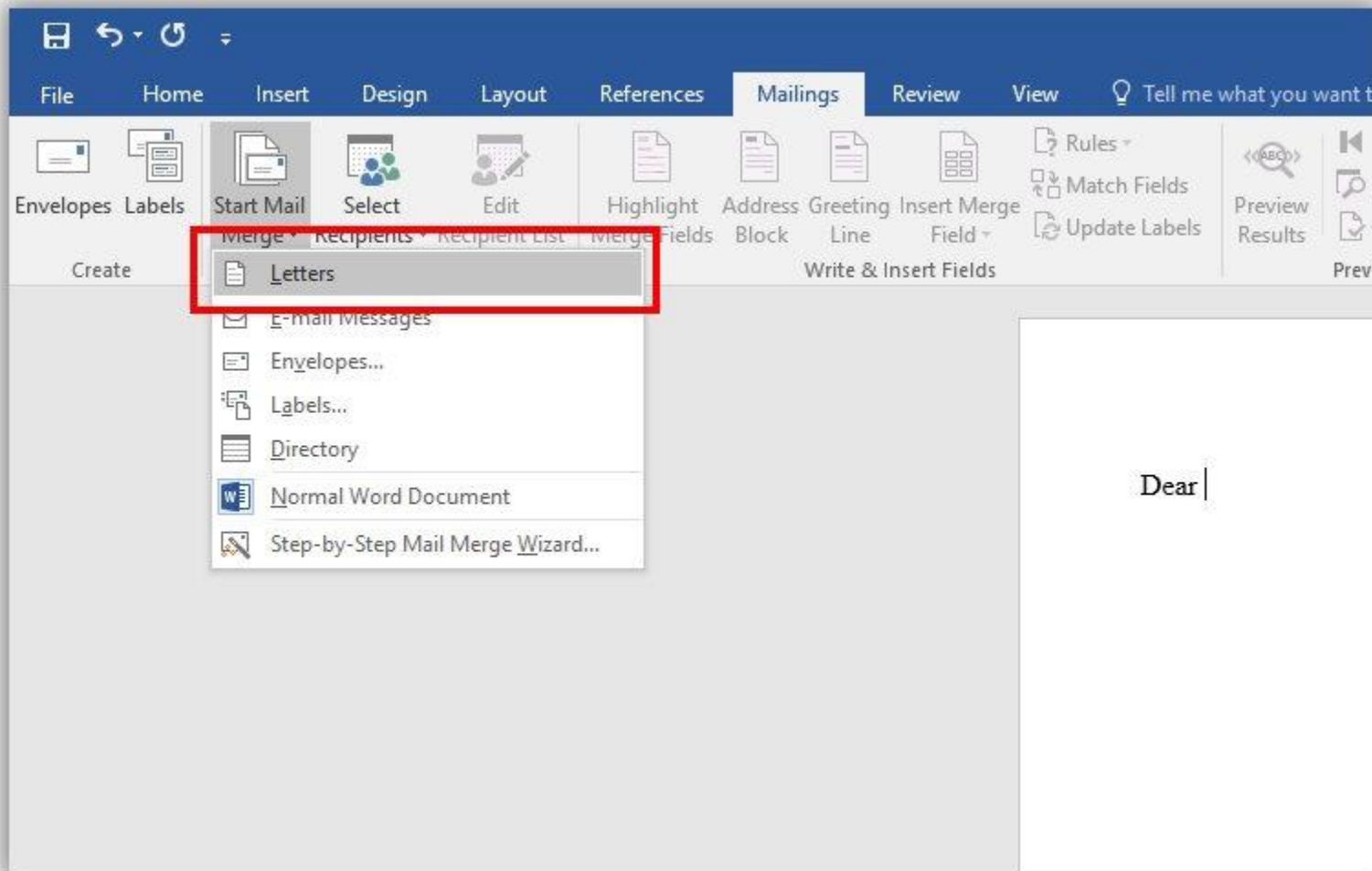
This will open your new blank word document.

Note: When doing this in the *future*, you can select to **open an existing document** that you've already designed.

Navigate to the **Mailings** tab > **Stat Mail Merge**.

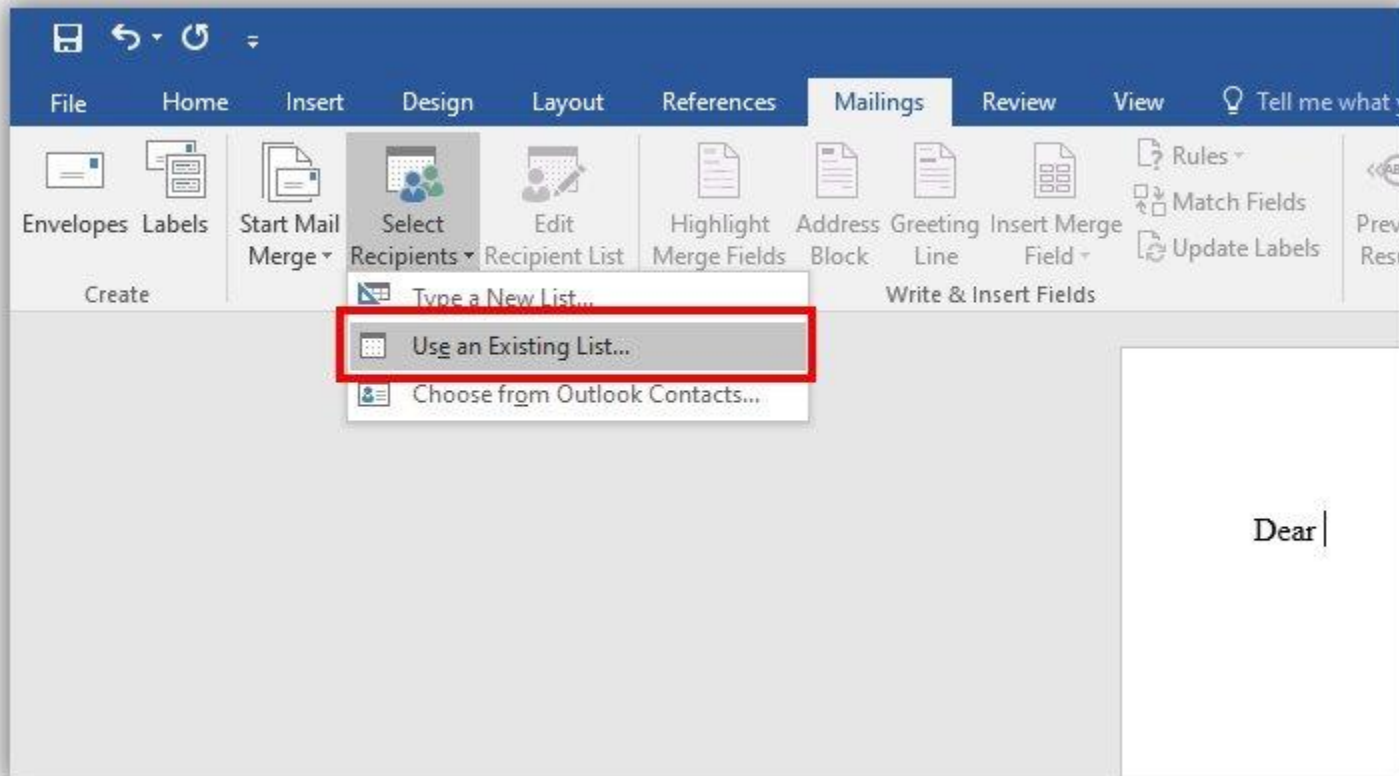


Select the **Letter** option from the drop-down.

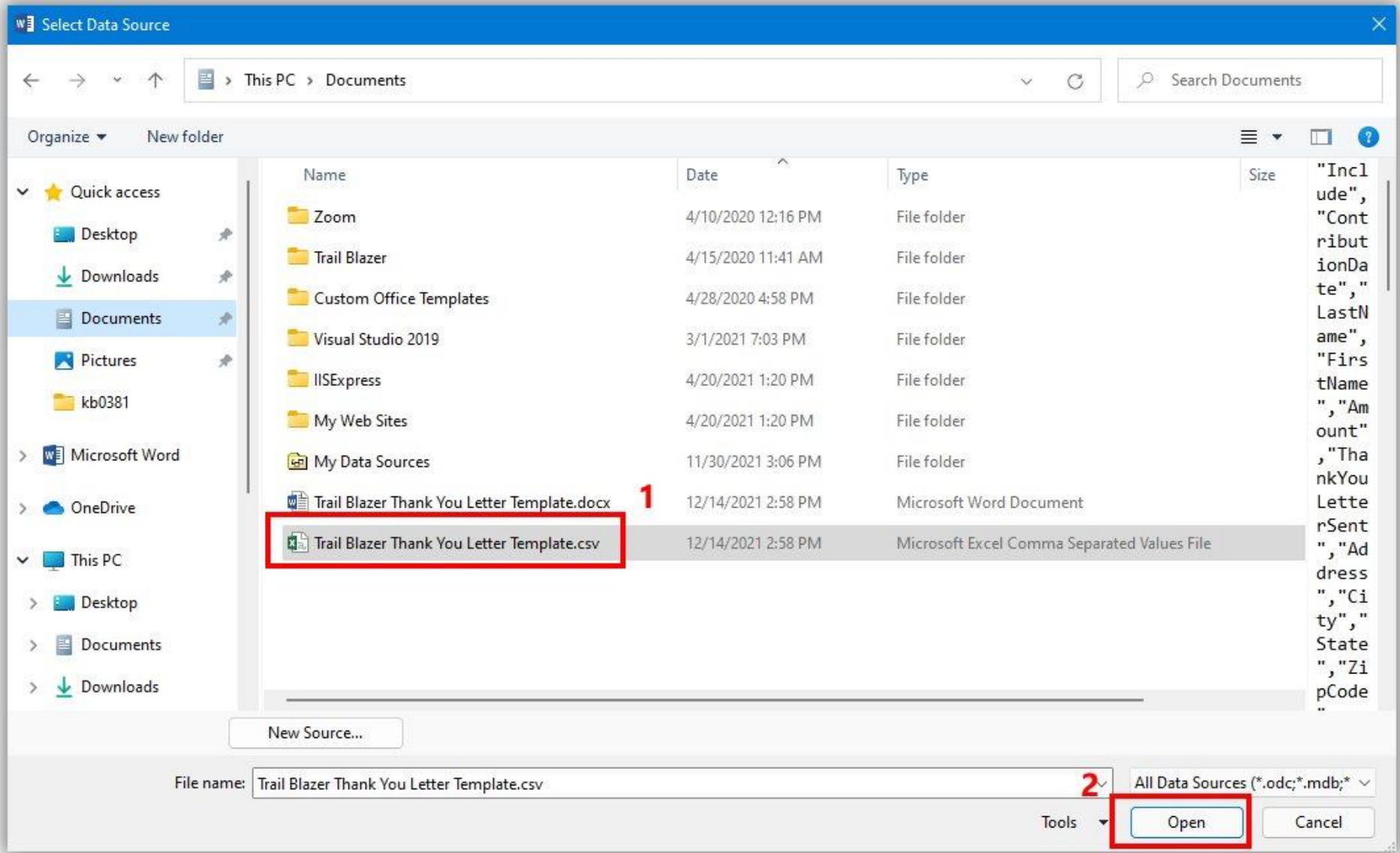


You can now proceed with **designing your template** by adding images, column dividers, text, custom font and styling, etc.

When you are ready to **insert a merge field**, click the **Select Recipients** drop-down under the **Mailings** tab and select **Use Existing List**.



Locate the **exported .CSV file** that was created in previous steps (it will have the same name as your word document), select it, and click **[Open]**.



Now you can click on the **Insert Merge Field** drop-down under the **Mailings** tab, and access the data fields that were exported in the .CSV file. *In my example, I insert the FirstName field.*

Inserting a merge field with the data points pulled from your Trail Blazer database.


Insert your mouse cursor where you want the field to be inserted.

Thank you so much for your very generous donation of \$[amount] to [Your Organization] [Date].

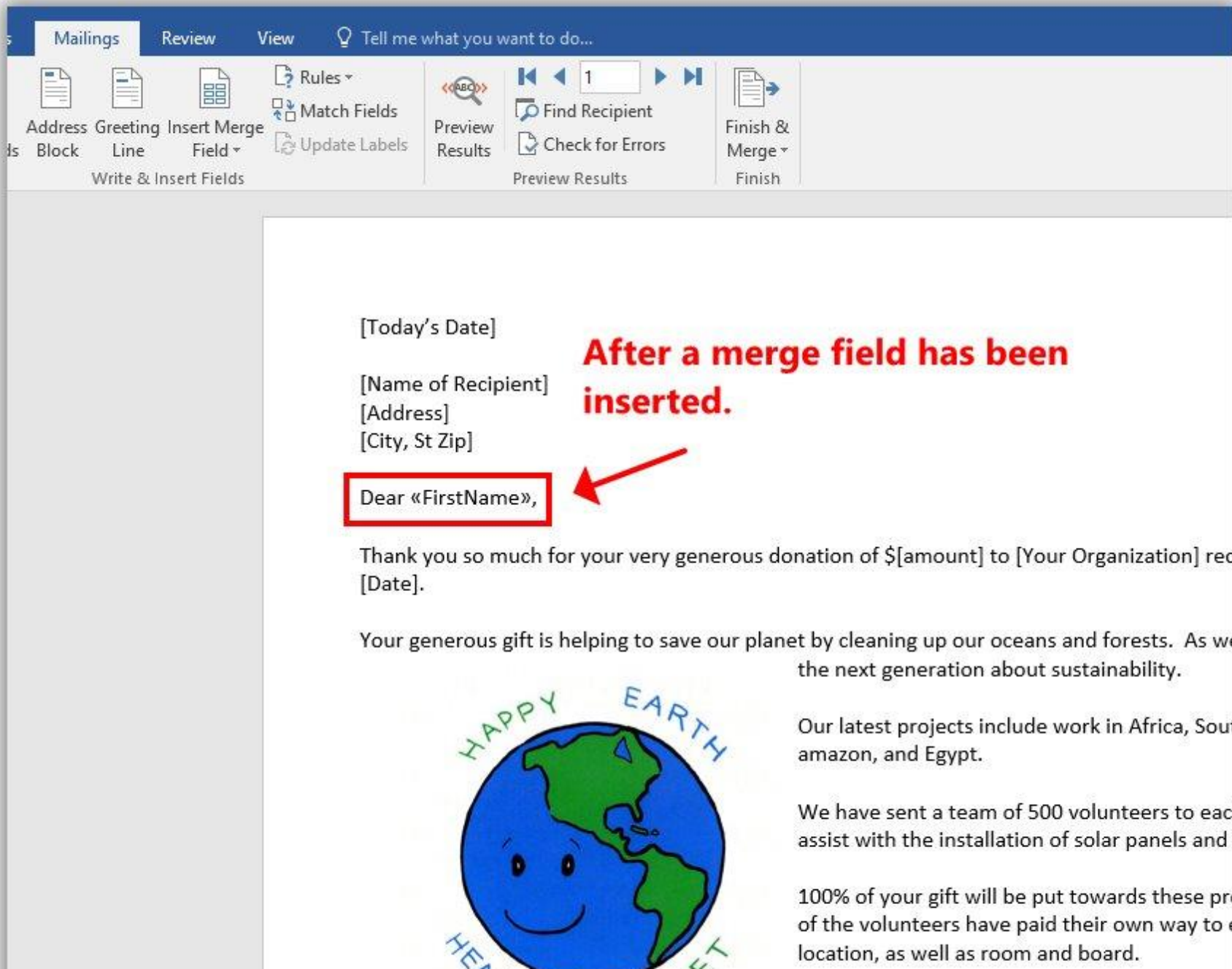
Your generous gift is helping to save our planet by cleaning up our oceans and forests for the next generation about sustainability.

Our latest projects include work in the Amazon, and Egypt.

We have sent a team of 500 volunteers to assist with the installation of solar panels.



After a merge field is inserted it will add << >> **symbols** around the text. Here's my *example*.

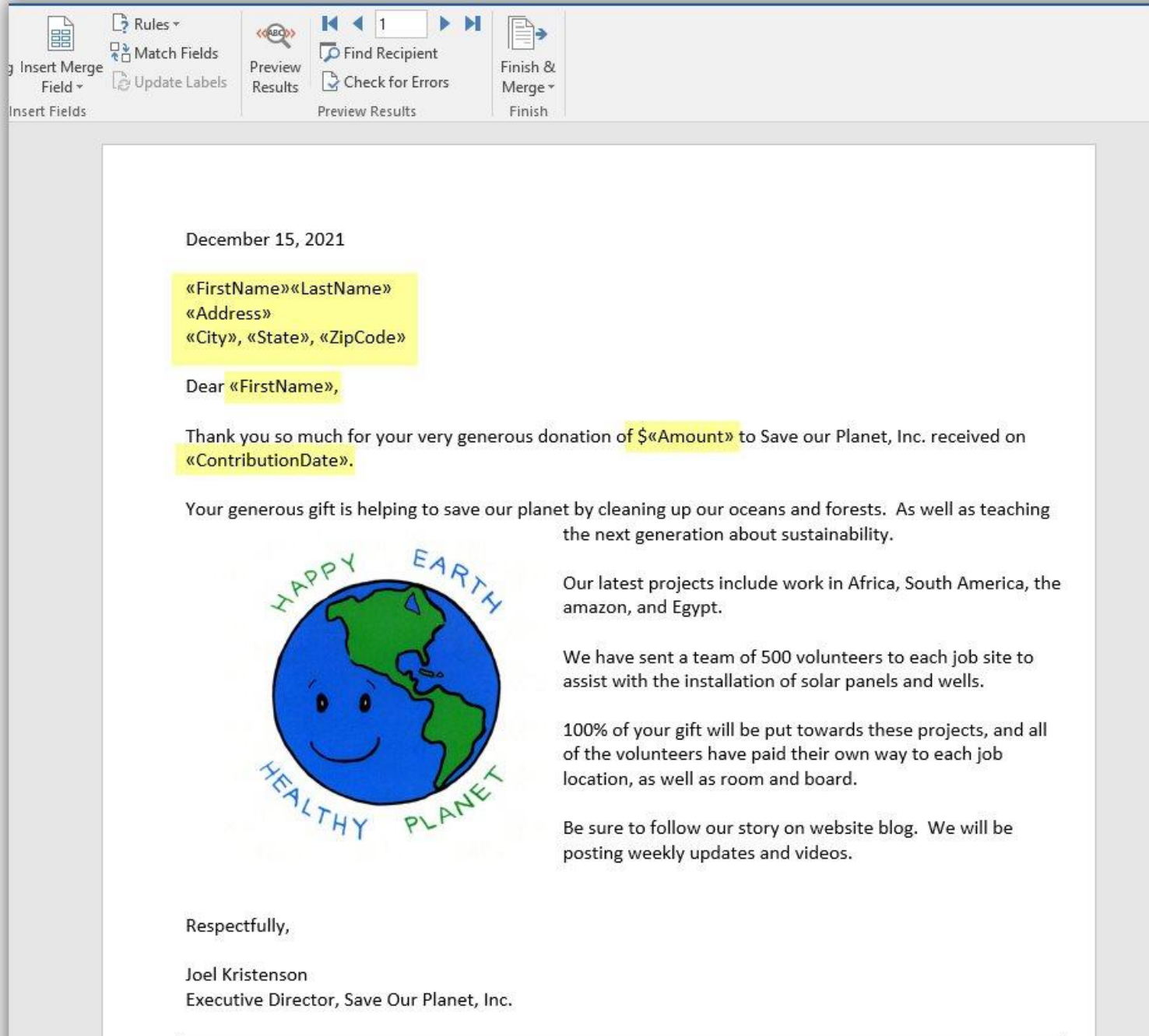


The screenshot shows the Microsoft Word interface with the Mailings ribbon active. The ribbon includes options for 'Write & Insert Fields' (Address, Greeting, Insert Merge Field, Block, Line, Field), 'Match Fields', 'Update Labels', 'Preview Results', 'Find Recipient', 'Check for Errors', and 'Finish & Merge'. The document preview area contains the following text:

[Today's Date]
[Name of Recipient]
[Address]
[City, St Zip]
Dear «FirstName»,
Thank you so much for your very generous donation of \$[amount] to [Your Organization] rec
[Date].
Your generous gift is helping to save our planet by cleaning up our oceans and forests. As we
the next generation about sustainability.
Our latest projects include work in Africa, Sout
amazon, and Egypt.
We have sent a team of 500 volunteers to each
assist with the installation of solar panels and
100% of your gift will be put towards these pro
of the volunteers have paid their own way to e
location, as well as room and board.

A red box highlights the text 'Dear «FirstName»,', and a red arrow points to it from the text 'After a merge field has been inserted.' located to the right of the box.

Repeat these steps until all of your desired merge fields have been added to your Word document. Once you're finished, **save the document** for future use. My finished *example* is below. I've highlighted the merge fields being used.



The screenshot shows the Microsoft Word Mail Merge ribbon with the following options: Insert Merge Field, Rules, Match Fields, Update Labels, Preview Results, Find Recipient, Check for Errors, and Finish & Merge. The page content is a letter template with the following text:


December 15, 2021

«FirstName»«LastName»
«Address»
«City», «State», «ZipCode»

Dear «FirstName»,

Thank you so much for your very generous donation of \$«Amount» to Save our Planet, Inc. received on «ContributionDate».

Your generous gift is helping to save our planet by cleaning up our oceans and forests. As well as teaching the next generation about sustainability.



Our latest projects include work in Africa, South America, the amazon, and Egypt.

We have sent a team of 500 volunteers to each job site to assist with the installation of solar panels and wells.

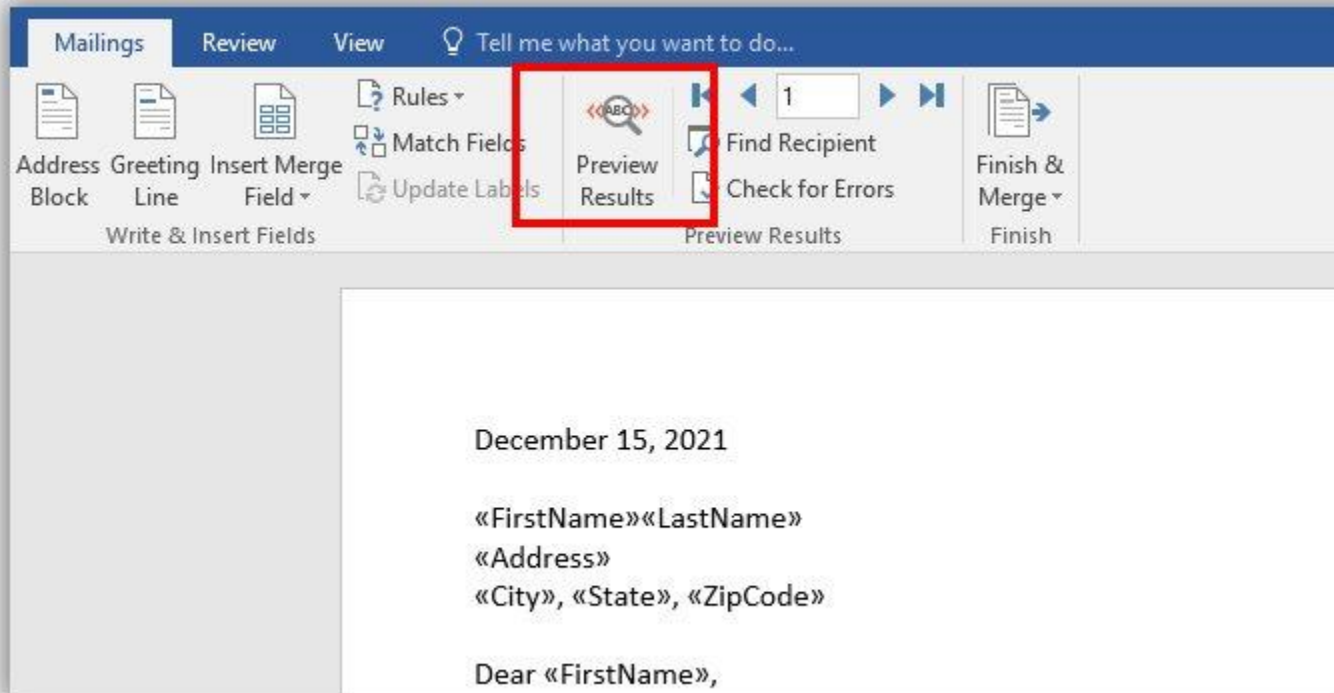
100% of your gift will be put towards these projects, and all of the volunteers have paid their own way to each job location, as well as room and board.

Be sure to follow our story on website blog. We will be posting weekly updates and videos.

Respectfully,

Joel Kristenson
Executive Director, Save Our Planet, Inc.

To test the print preview, click the **[Preview Results]** button under the **Mailings** tab.



Below is my print preview example. You can page left and right to see how the letters work before printing.

The screenshot shows the Microsoft Word interface with the Mailings ribbon selected. The ribbon includes options for 'Write & Insert Fields' (Address Block, Greeting Line, Insert Merge Field), 'Preview Results', and 'Finish'. The main document area displays a letter with the following content:

December 15, 2021

Joseph Brochin
3117 24th St E
Minneapolis, MN, 55406

Dear Joseph,

Thank you so much for your very generous donation of \$500.00 to Save our Planet, Inc. received on 12/1/2021.

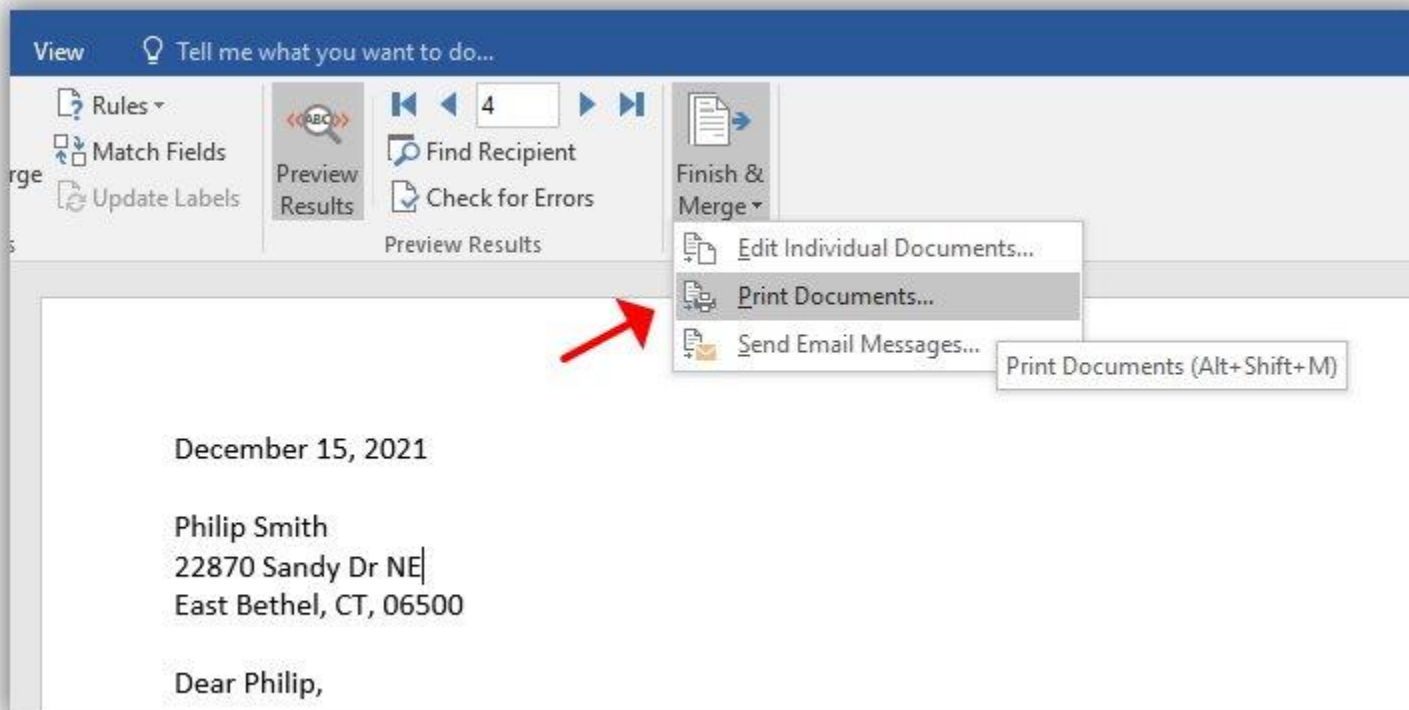
Your generous gift is helping to save our planet by cleaning up our oceans and forests. As well as teaching the next generation about sustainability.

Our latest projects include work in Africa, South America, amazon, and Egypt.

At the bottom of the letter, there is a graphic of a globe with the words 'HAPPY EARTH' written in a semi-circle above it.

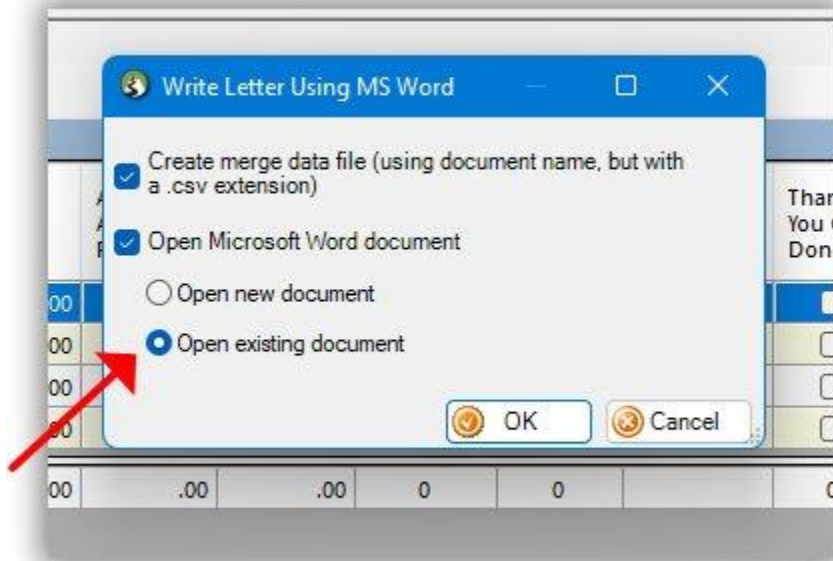
Two red arrows point from the text 'Live print preview.' to the date and the recipient's address. The text 'Live print preview.' is written in red.

If everything looks correct, you can click **[Finish & Merge] > Print Documents**.

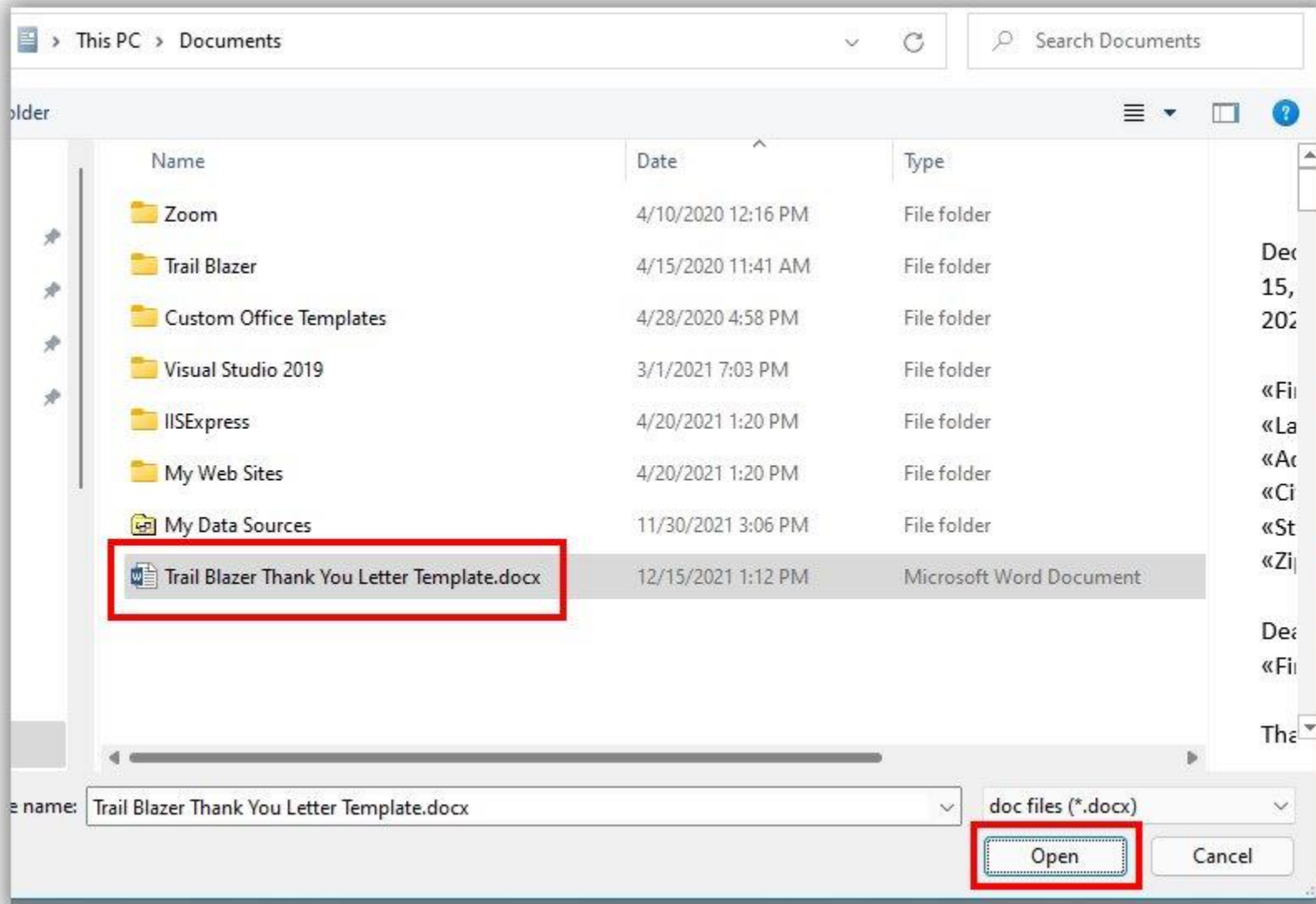



If you are printing thank you letters, you will want to return to **Trail Blazer** and click the **[Sent]** button for those people that the letter was mailed to.

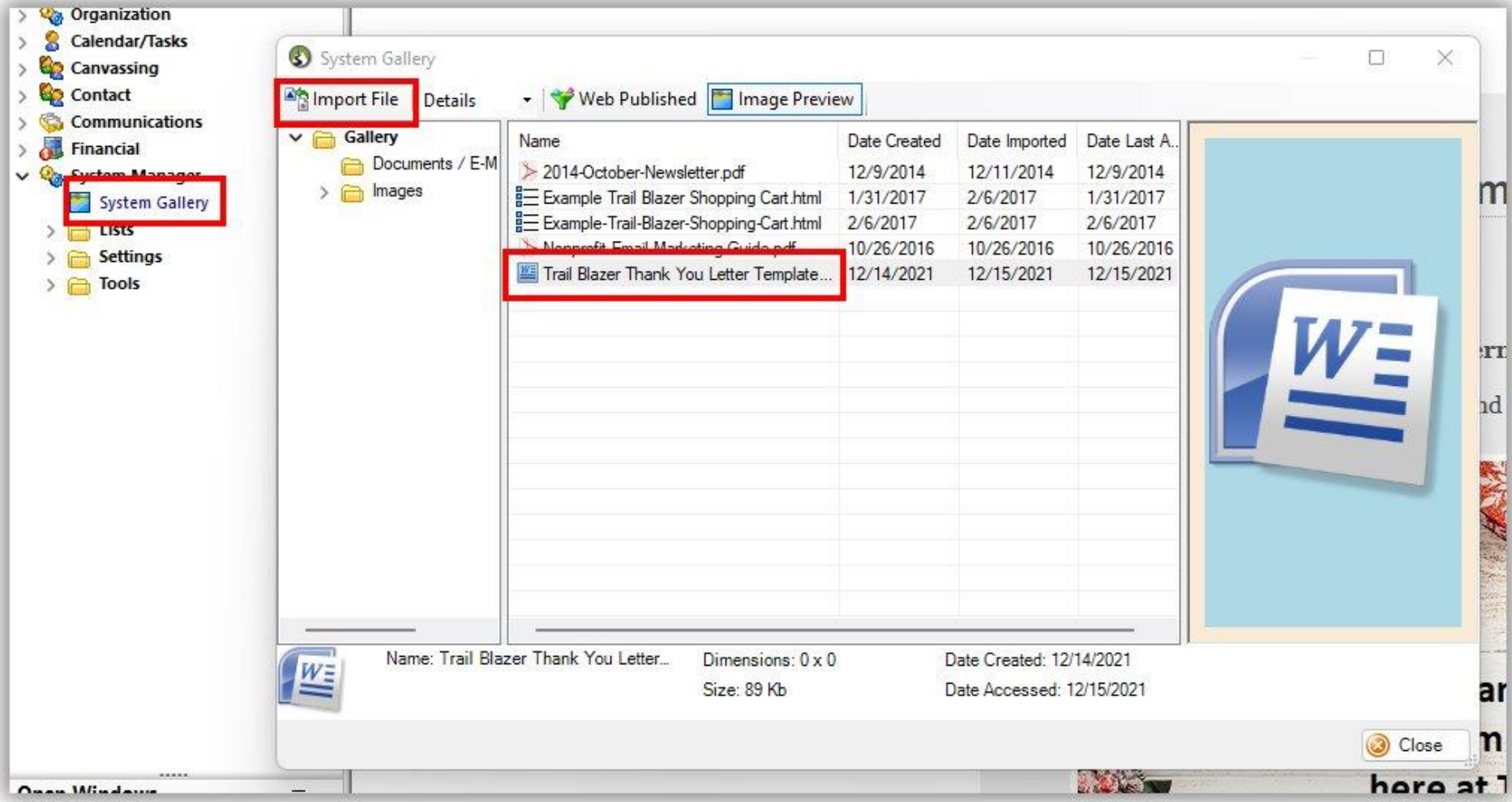
You can now utilize the mail-merge Word document that you've created, when you need to export and merge again in the future. For future merges, you will use these settings:



And select the file that has the merge fields included.



 **Tip:** you can upload and save a copy of the word document that you create, into the **System Gallery** in your database. That way other users will have access to it. Example:



The related resources below will provide quick links to other related articles and videos.



Trail Blazer™

- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

Related Resources

Article: [Creating and Saving Default Formats for Reporting with the Grid](#)

Article: [How to Print Envelopes](#)

Article: [How to Print Household Labels](#)

Article: [How to Print Mail-Merge Address Labels](#)

Article: [How to Mass Update a List of Contacts with an Attribute Item](#)

Video: [Beginning Queries – Nonprofit](#)

Video: [Year End Tax Letter](#)

Trail Blazer Live Support

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📘 **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

🐦 **Twitter:** <https://twitter.com/trailblazersoft>

** As a policy we require that you have taken our intro training class before calling or emailing our live support team.*

[Click here](#) to view our calendar for upcoming classes and events. You can sign up other members on your team for the same training.

** After registering you'll receive a confirmation email with the instructions for how to log into the [GoToMeeting](#) session where we host our live interactive training classes.*

** This service is included in your contract.*