Import Inputs to Contract Template with Mail Merge (Demo Part 2/3)

Use Microsoft Word's Mail Merge feature to generate personalized contract documents using the provided files.

This is a demo for Windows.

1 Welcome to the second part of the demo for the American Public Transportation Association's automated White Book.

Before conducting the Mail Merge, make sure to check the following:

- Both files (the inputs spreadsheet and the template document) are saved in the same folder.

- The Excel file is **closed** before starting the merge.

- If you rename any of your files, make sure to refer to the updated name during the Mail Merge.
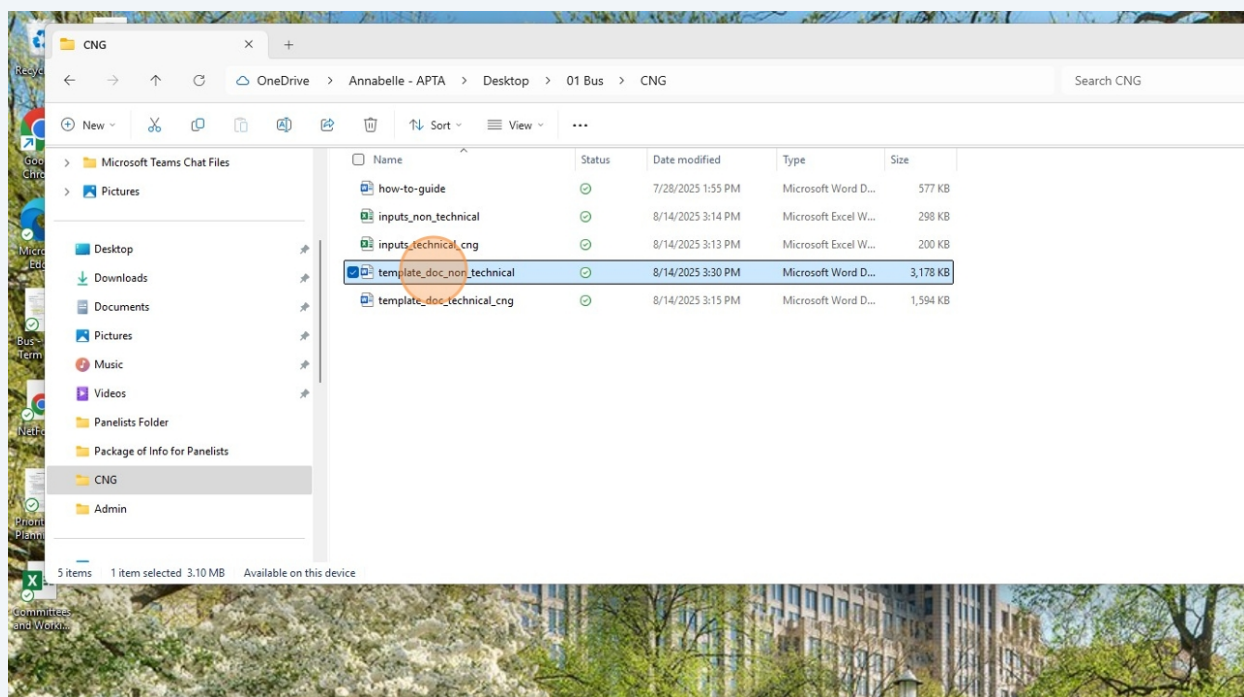
2 Step 1: Open the Word Template.
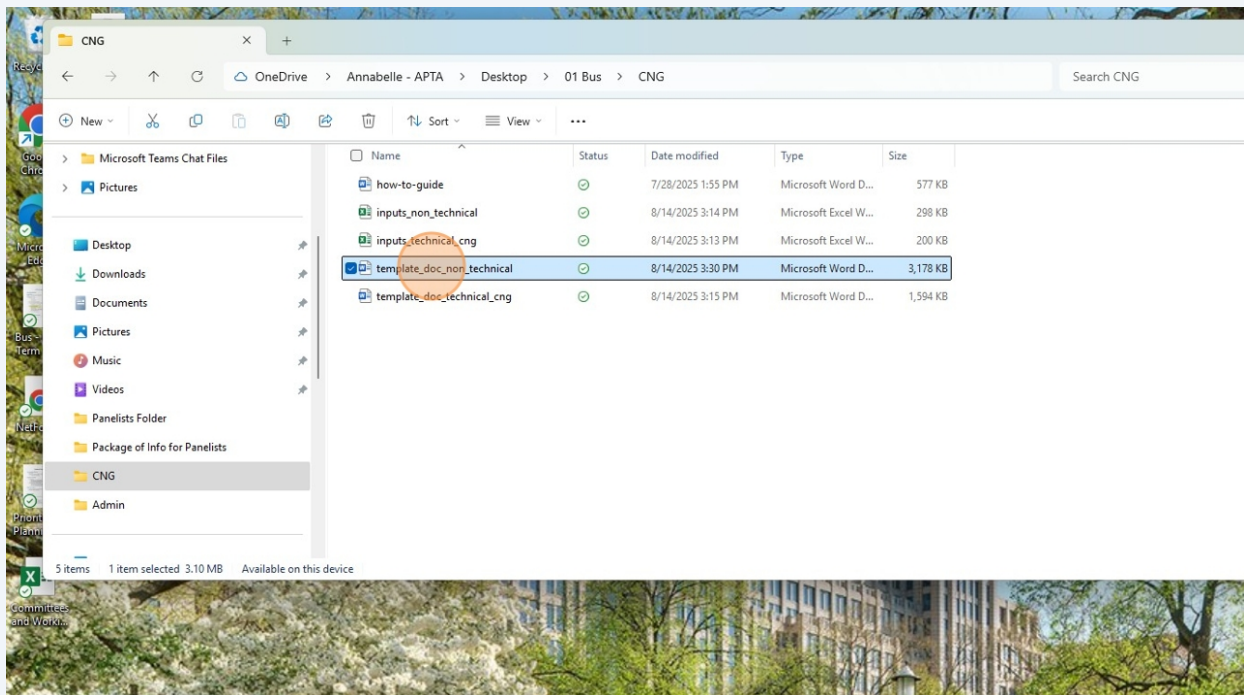
3 Check that the document is editable and is not in "Read-Only" mode. If it is, save a copy to your own files to enable editing.

4 **Step 2: Start the Mail Merge**

Go to the Mailings tab, then click "Start Mail Merge."

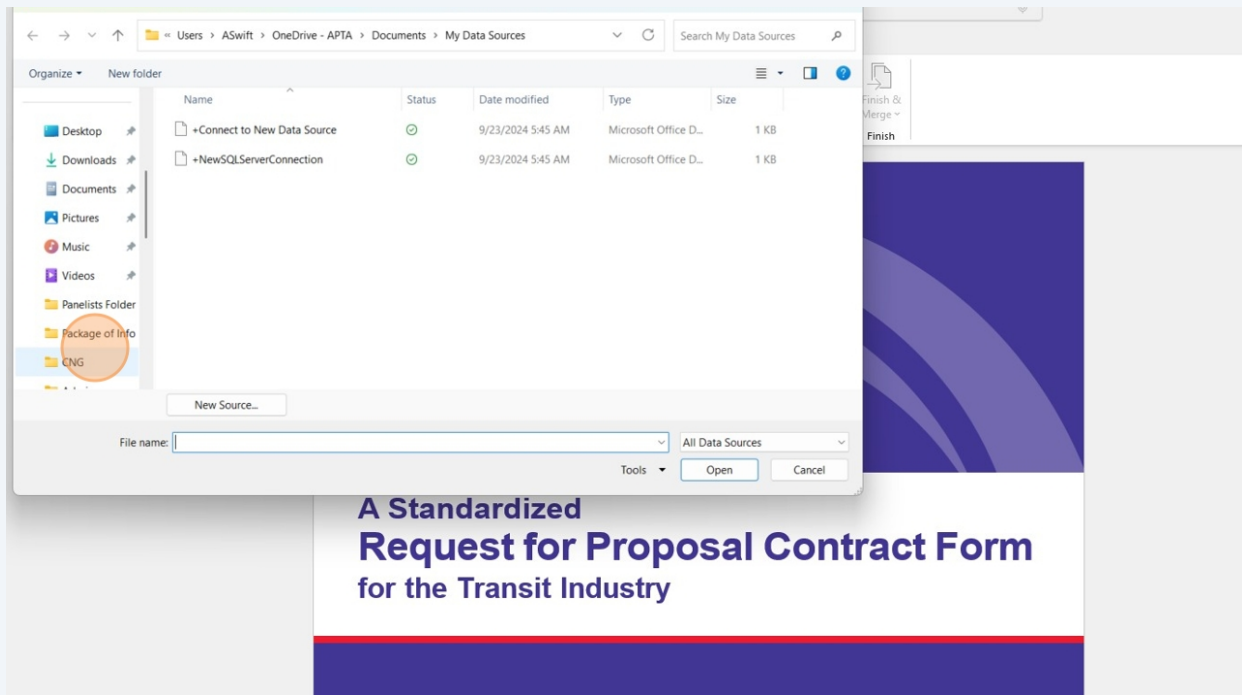**5** Choose "Normal Word Document."

6   Step 3: Connect the Excel File.
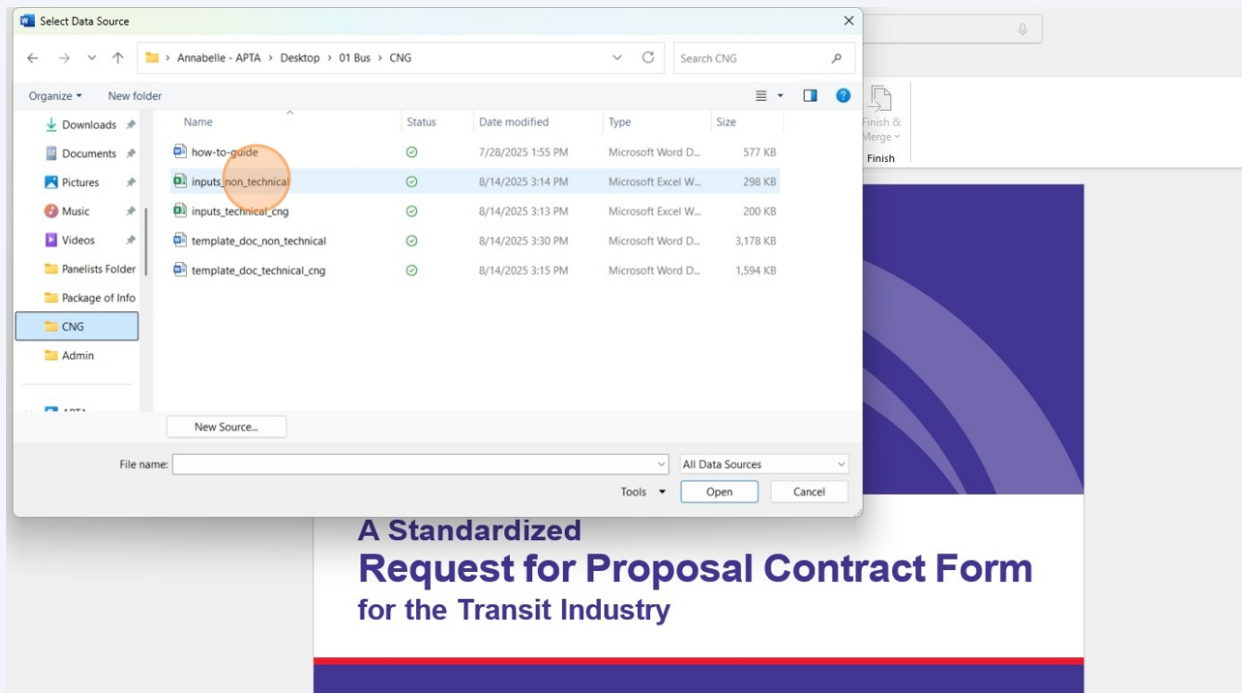
Click **Select Recipients.**

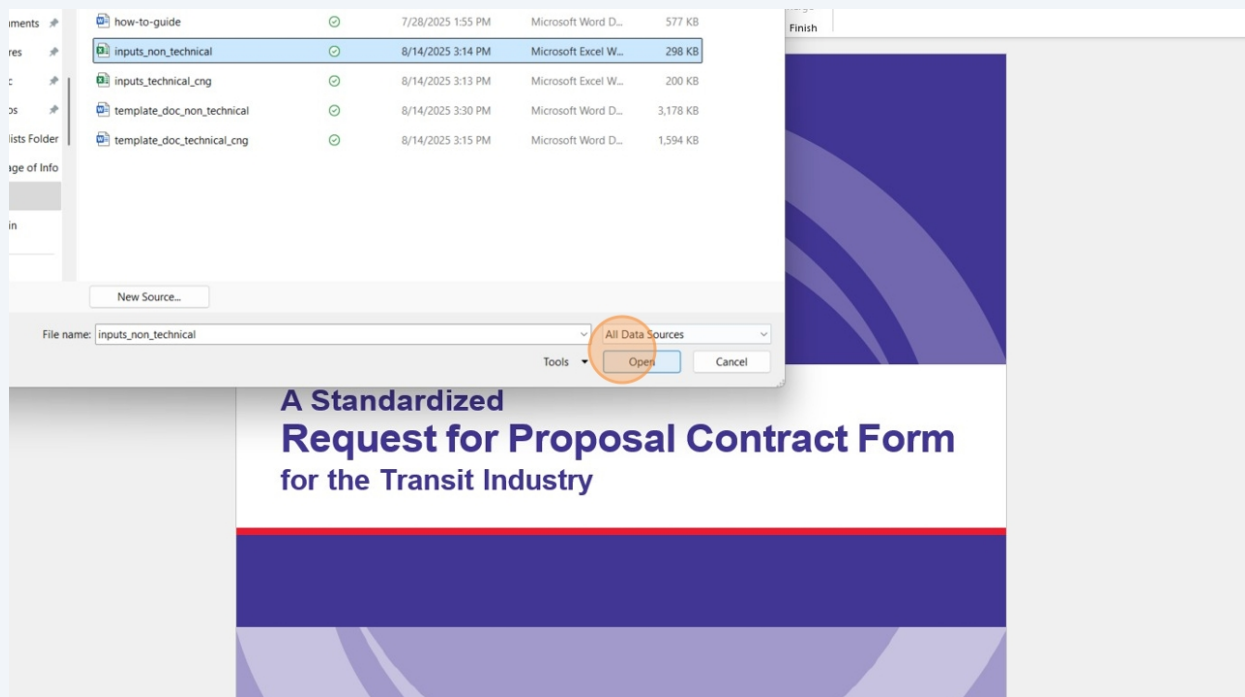**7**   Click "Use an Existing List..."

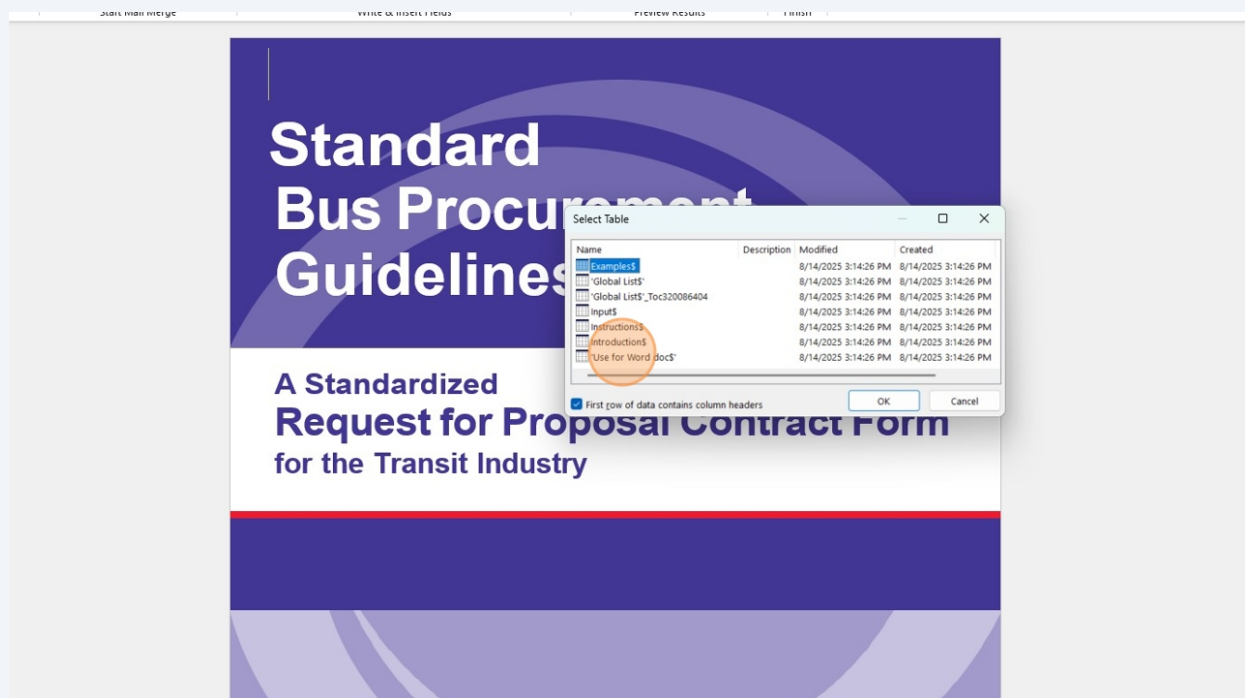**8**   Browse in your folder with all the documents.

9   Select the spreadsheet which corresponds with the template document.

10 Here, that is the non-technical Excel.

11 If prompted, choose "Use for word doc$" sheet.
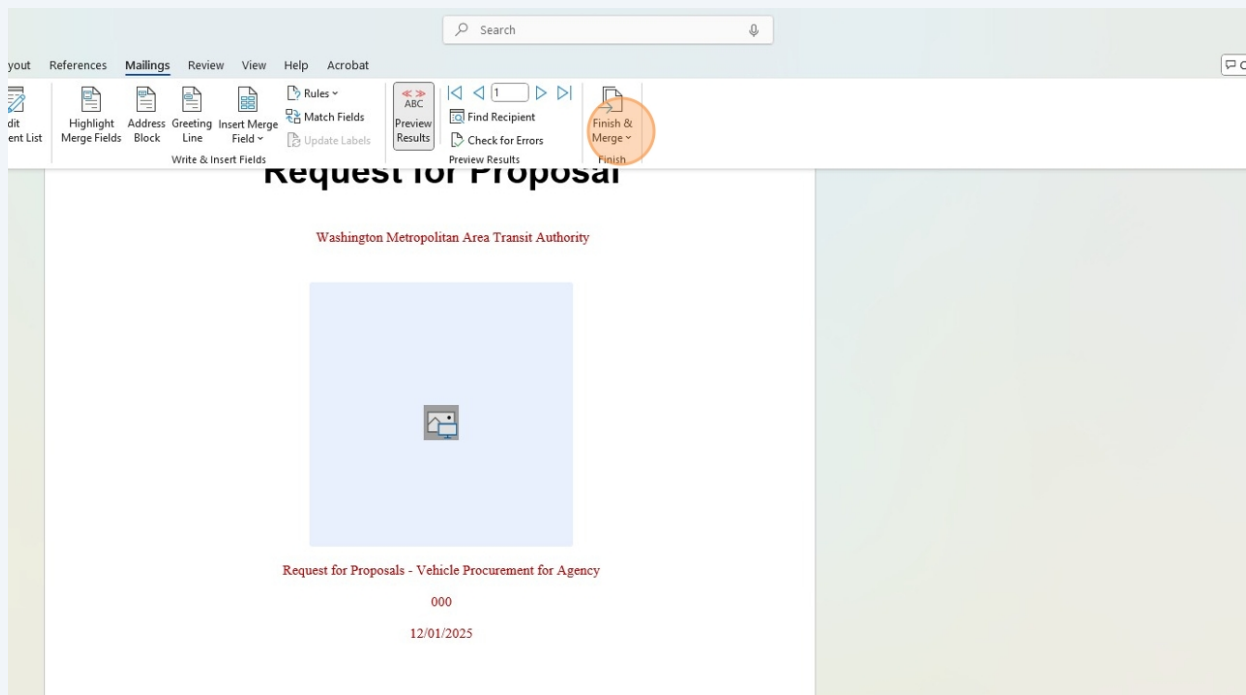
12 Then click "OK."

13 Step 4: Preview the Results

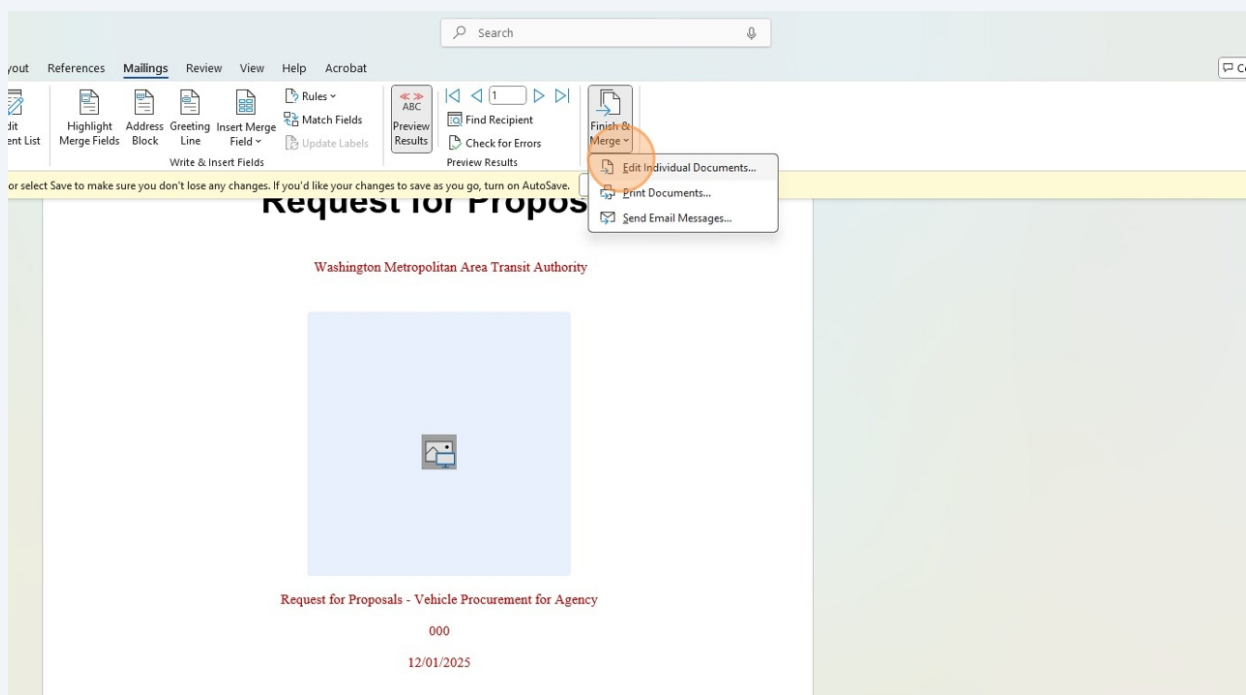Click "Preview Results" to review how each contract with look.

14 Step 5: Finish & Generate the Documents

Click "Finish & Merge."


**15** Choose "Edit Individual Documents..."

16 In the dialog that appears, select "All" and click "OK." Word will generate a new document with all merged information.

Step 6: Modify and Revise

You can now perform a final review to ensure the contract meets your needs. You can make any additional changes directly in the document, including adding images, appendices, or adjusting the languages as necessary.
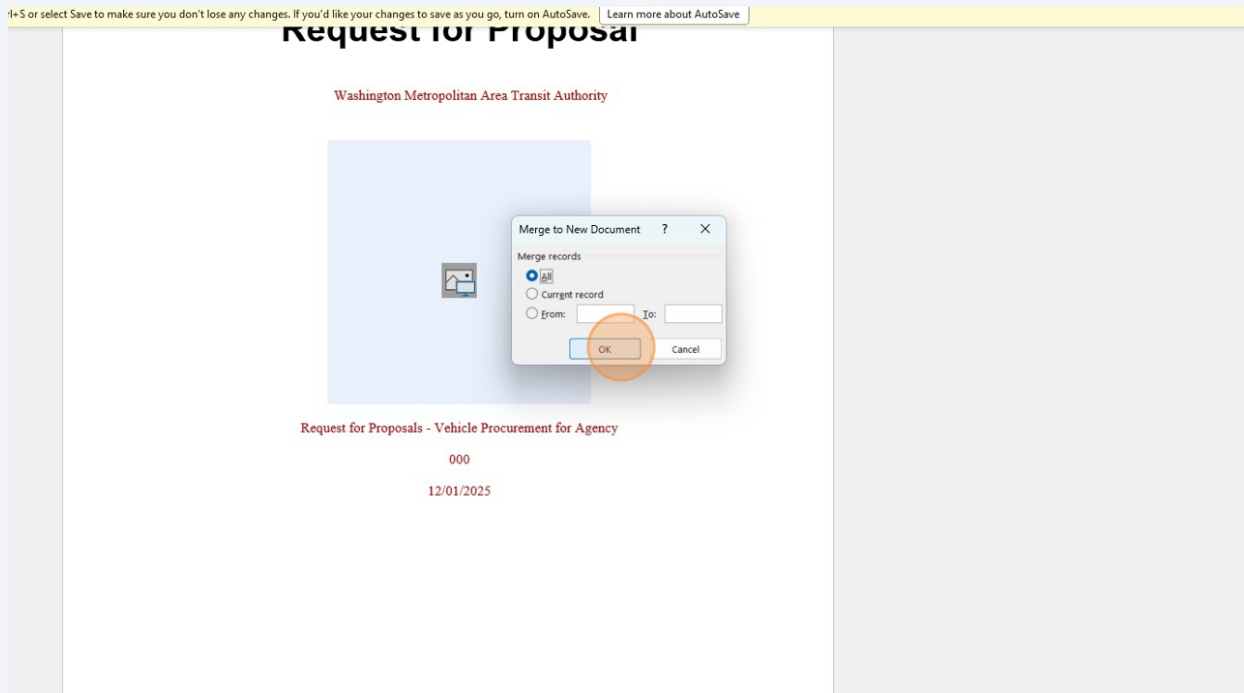
17   Step 7: Rename and Save
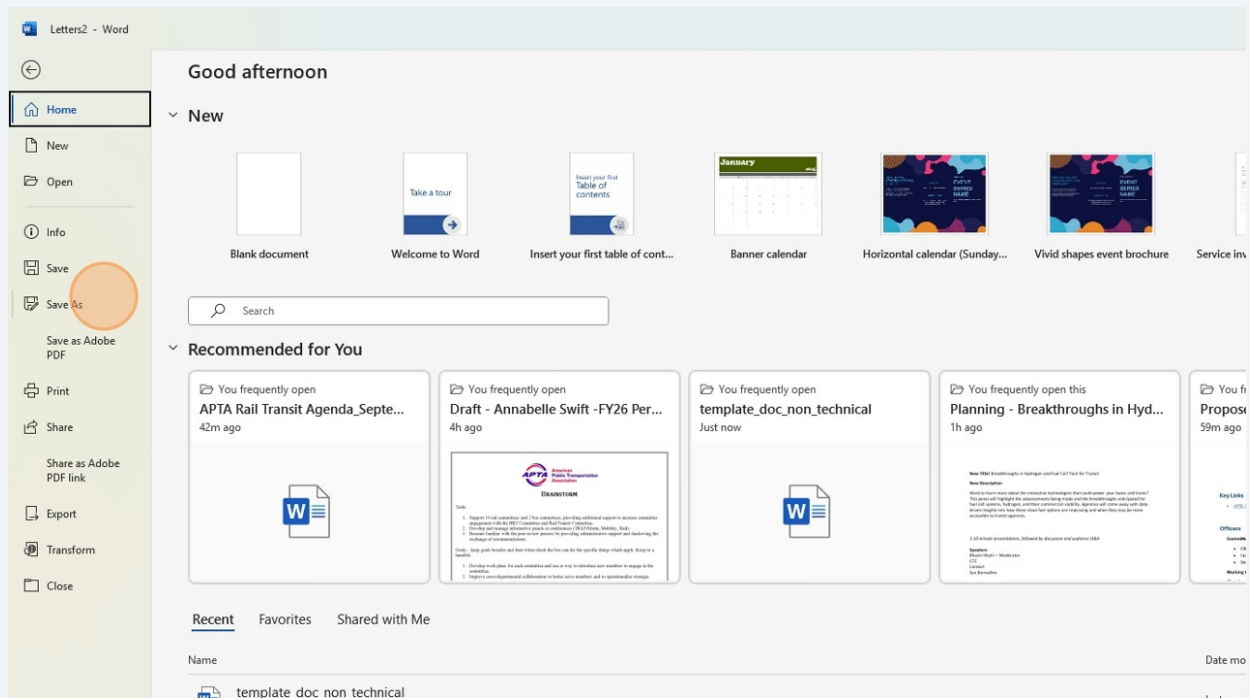
18   Name your file and save (It is recommended to include the date you worked on the contract in the name for version control).
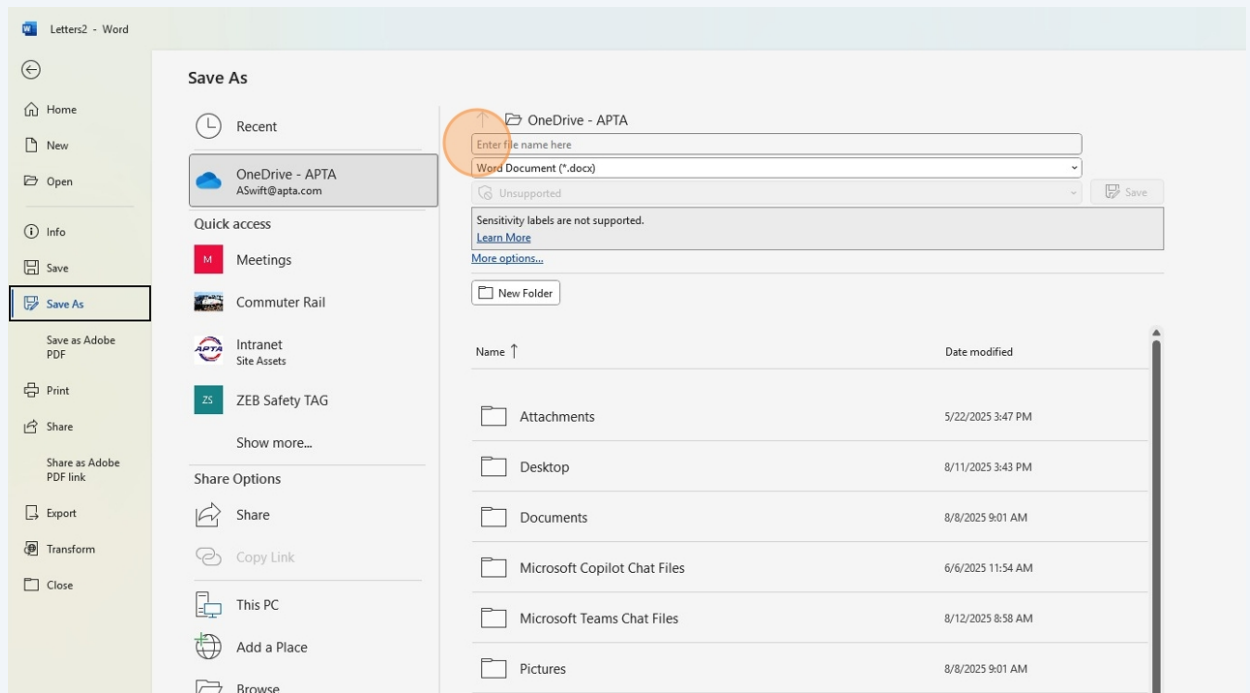
19 Done!

Note: This is part **1 of 3 for the mail merge**. After completing this process, repeat the same steps using the **technical** versions of the input and template files. Then, you are ready to merge the inputs into technical documents, which we explain in the next demo.