

[How to prepare renewal documents](#)

General

Renewal letters and reminders are generated separately for **Individual** and **Joint** members – slightly different wording. First the data must be downloaded from Beacon (see below). There are then two steps for each membership class, analyse the data ready for merging with the letter and then the actual merge and printing process. The paragraphs below deal with each step in turn.

Note that the analysis macro ignores all records other than those of status Current. To enable reminders to be processed, the macro also ignores records whose renewal date does not equal the 1st of September for the year the program is running (i.e. those who have already paid).

The instructions below assume you have a folder called “Renewals” (perhaps inside your document folder).

[Download the data from Beacon](#)

Log into Beacon

In the Misc column on the menu, click Data export & backup.

On the next page, check that the radio button Excel is selected and click Back up all data.

Save the downloaded file into your Renewals folder, either remembering its name or changing it to something you can remember.

[Analyse the data](#)

Copy “Extract Renewals Details.xlsm” from the repository into your Renewals folder and open it.

Go to the Membership sheet and click the Execute button.

You will be asked to choose between **Individual** and **Joint** membership classes and required to select the workbook containing the download data saved earlier.

When the analysis is finished you are required to nominate a location to save the result. It is suggested that you select your Renewals folder. The resultant file is named “Renewal data xxxxxx yymmddhhmmss.xlsm”, where xxxxxx is either “Individual” or “Joint” and yy...ss is a date/time stamp.

[Merge the letters](#)

Copy “Renewal Template Individual.docx”, “Renewal Template Joint.docx”, “Reminder Template Individual.docx” and “Reminder Template Joint.docx” into your Renewals folder.

Open the relevant template file – be careful to pick the correct one. You will see a pop-up about selecting your database. Click <No>.

On the ribbon, open the Mailings tab then Start Mail Merge and Step by Step Mail Merge Wizard.

In the wizard, go forward or back to step 3, *Select recipients*.

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Click the radio button *Use an existing list* and click *Browse*

Navigate to the relevant Renewal data... file in your Renewals folder and select the Members sheet.

You can now roll forwards through the wizard.

When you reach step 6 of the wizard, select *Edit individual letters...* and save the result in your Renewals folder (as, say, Renewals Joint.docx or Renewals Individual.docx).

Before printing, search for "Page 3 of 2". The letter is designed as 2 pages. Any renewals which go to three pages need to be adjusted manually, ***otherwise the printing will go horribly wrong.***