

Service2000 Primer: Word 2000 Mail Merge For Mailing Labels

Requirements: Service2000 Marketing & Mailing Module, MS Word 2000

Overview

Service2000's Marketing & Mailing Module automatically opens MS Word 2000 and creates a mail merge within it. When creating letters, Service2000 must be pre-configured with a suitable Word template file. By contrast, when creating labels, the label template is created on the fly when you answer certain questions asked by MS Word 2000 during the merge – a very simple and quick process once you understand it. The following instructions will walk you through this step-by-step. Important: These instructions were written for use with MS Word 2000 from Office 2000. Service2000 is not tested with Office 97, and this procedure will differ somewhat in Office XP.

Disclaimer

Please review "About Mail Merges" in Word's help before proceeding (search for "mail merge labels"). There are many different ways that mail merges can be performed in Word. Some deviation from these instructions may be required. You should have a basic understanding of how mail merges work. GenesisFour does not support any software other than its own, and this document is provided as a courtesy and convenience to you.

Procedure

1. From the Main Toolbar click on reporting, Marketing & Mailing, Customer.
2. Create a list of names to be merged into labels as desired.

As a simple example using the Service2000 demo, try these selections:

Name	City	State	Status
Albert, Fat	Brooklyn	NY	Prospect
Alda, Alan	Los Angeles	CA	Prospect
Babarino, Winnie	Brooklyn	NY	Prospect
Bandaras, Antonio	Philadelphia	PA	Prospect
Bush, George W.	Washington	DC	Active Customer
Capone, Al	Brooklyn	NY	Prospect
Danger, Nick	Sudbury	MA	Active Customer
DiLaura, Dan	Batavia	NY	Prospect
Dodger, Artful	Sudbury	MA	Prospect
Eastwood, Clint	Madison	WI	Active Customer
Fonzarelli, Aurthur	Milwaukee	WI	Prospect
Ford, Harrison	San Francisco	CA	Prospect

Selections

First Field: All Customers

Second Field: Ignore this field

(It is overridden by the "All Customers" selection in the previous field)

Third field: All Matching Customers

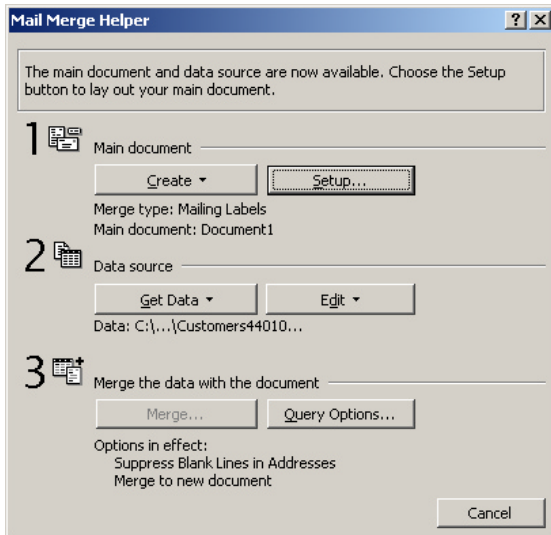
Fourth field: no Template File needed (OK to leave blank)

3. Click "Go" to run the sort. The customer names will appear approximately as shown.

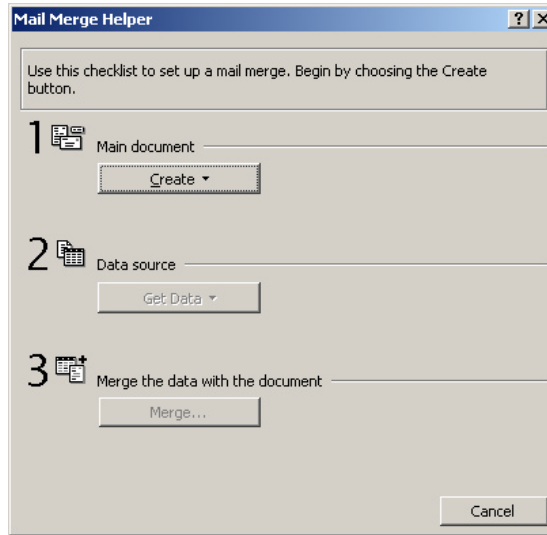
4. Click on "Open Letter". Word 2000 will open, but the screen will be blank.

5. From within Word2000, Click on Tools, Mail Merge. The “Mail Merge Helper” will appear, in either of two ways, as shown below. If you have done everything to this point correctly (e.g., you have actually created a mail merge document from your data export from Service2000, the screen should appear as shown on the left. If you have not done everything correctly to this point, the screen will appear as shown on the right. If the screen on the right is what you have, start over – you blew it.

CORRECT

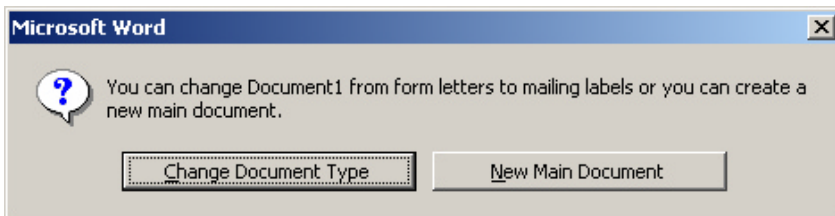


INCORRECT



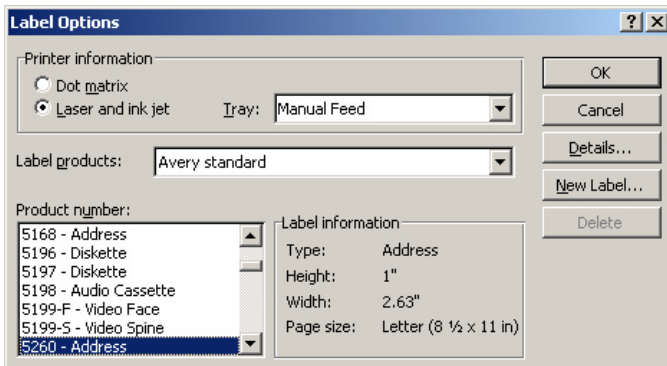
6. Study the 3-step Mail Merge Helper dialog carefully. The results of selections you make while moving through the required steps as called for by the Mail Merge Helper will appear on this screen directly underneath the buttons (you can see this on the “CORRECT” screen above). However, if this is the first time you have run a mail merge, no selection results will be displayed. This is normal.

7. In Step 1 of the Mail Merge Helper, click “Create”. A drop down list will appear (not shown). From this drop down list, select Mailing Labels. The following dialog will appear:



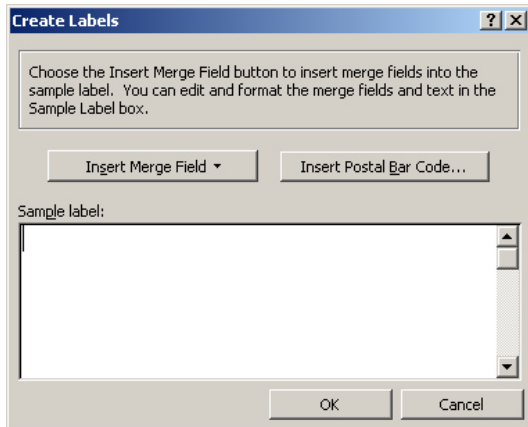
8. Select Change Document Type and then choose “Mailing Labels” unless the last mail merge done was to mailing labels. If it was, the Mail Merge Helper will show this, (as shown in the “CORRECT” screen, above.). Again, remember that your exact screen sequence may vary depending on your selections, or prior selections that may already have been made in the Mail Merge Helper.

9. In Step 1 of the Mail Merge Helper, click Setup (as shown in the “CORRECT” screen above). The following dialog will appear:

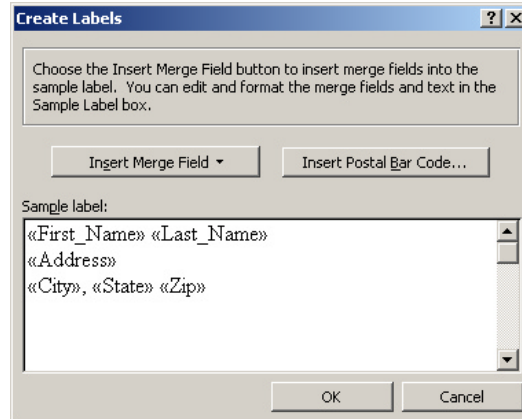


Select the Product Number for the labels you plan to use. The most common address labels used for mailing are the 5260 – Address labels, as shown selected in this screen capture. Many other options are available from this dialog – normally you don't need to make any selections and none are recommended or needed now. Click OK. 10. The Create Labels dialog will appear, as shown on left ("BEFORE"). Click on Insert Merge Field, and select the desired fields for your label from the drop down list (not shown). Remember to include spaces and commas between the merge fields just as you would in any address. After all merge fields have been selected, your screen will look something like the one on the right ("AFTER").

BEFORE

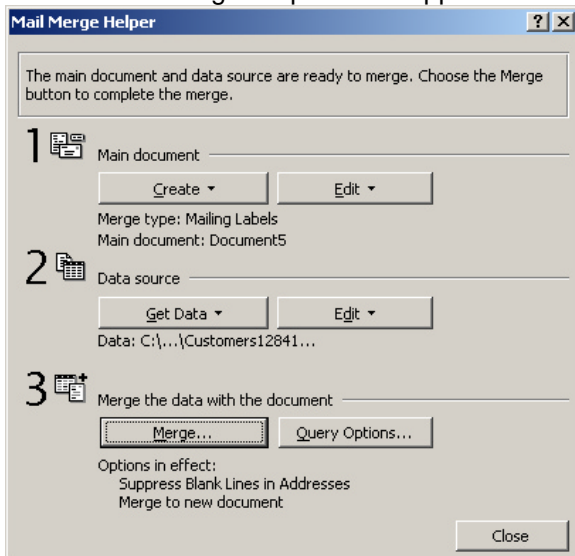


AFTER



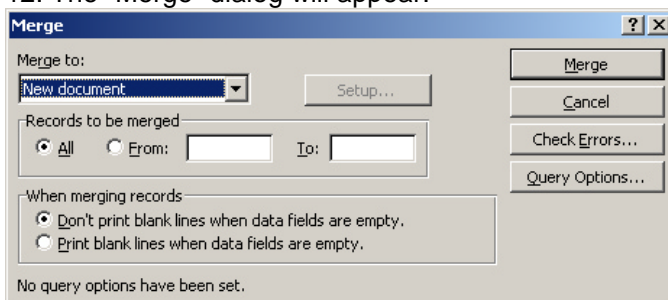
Click on OK.

11. The Mail Merge Helper will reappear as follows:



Under Step 3, click on Merge (yes, you just skipped Step 2 and went directly to Step 3).

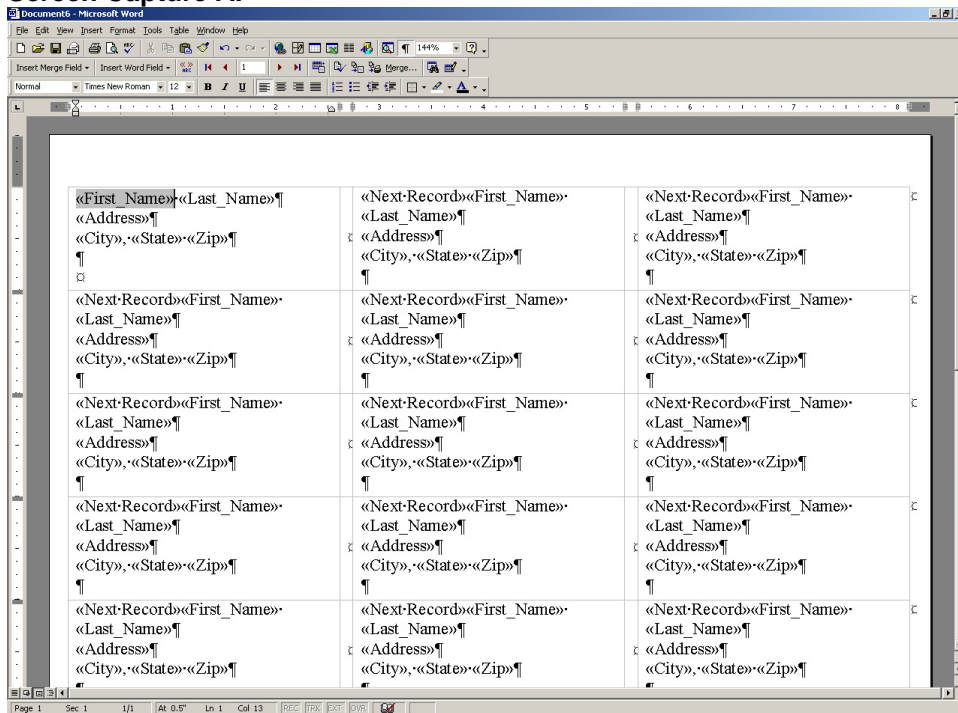
12. The "Merge" dialog will appear.



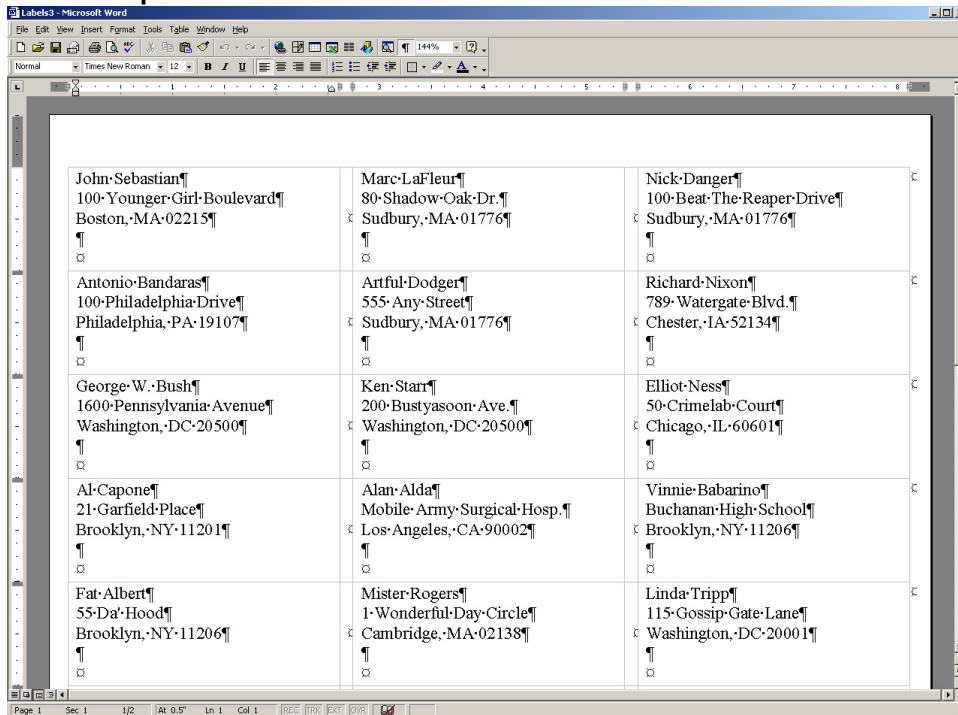
Click on Merge. The merge of your data with the final document will now occur. See next page.

13. Two documents are created at this point, as shown below. You can switch between them by clicking on the <<ABC>> icon or clicking on Window and making selections from there. As you can see in Screen Capture A, you may not need to be concerned with the fact that the merge fields wrap onto the next line, as they do here. Check your actual merged data (as shown in Screen Capture B). The procedure for printing the labels will differ slightly depending on which of these screens you are doing it from (typically, click on the "Merge To Printer" document).

Screen Capture A.



Screen Capture B



Two other important tips

- You may wish to save the final merged document in order to keep a record of this mailing.
- If you feel you have screwed up the merge, simply close all Word documents and go back to step 4.