SERVICE2000 by GenesisFour

The Shop Management System You Thought Nobody Would Ever Do Has Finally Been Done.

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:

🛃 Reporting				
<u>File W</u> indow <u>H</u> elp				
E-Customers Houstomers Analing & Marketing - Customer - Customer - CustomerLink Follow-up	Add each custome All Customers Send To: Al	r where: Begins Wit Matching Customers	h T	
- Long Lost	Mana	low.	IC to be	Curry
- Recommended Repairs	Albert Eat	Brooklun	NY	Brospect
- Service Due	Alda Alan	Los Angeles	CA	Prospect
m. Sales	Babarino, Vinnie	Brooklyn	NY	Prospect
Here Technicians	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
	Template File:			Select File
	<u>O</u> pen Letter	Export to File		<u>C</u> lear Results

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	
Mail Merge Helper	? X Mail Merge Helper ?	
The main document and data source are now available. Choose the Setu button to lay out your main document.	up Use this checklist to set up a mail merge. Begin by choosing the Create button.	
1 Imain document <u>Create</u> ▼ <u>Setup</u> Merge type: Mailing Labels Main document: Document1 Data source <u>Get Data</u> ▼ Edjt ▼ Data: City JCustomers4010	1 B Main document	
3 Content of the data with the document	A Cancel	

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:

Microsoft Word	X
You can change Document1 from form new main document.	letters to mailing labels or you can create a
Change Document Type	<u>N</u> ew Main Document

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:

Label Options			<u>?</u> ×
Printer information C Dot <u>m</u> atrix C Laser and ink iet Tray:	Manual Feed		OK Cancel
Label products: Avery standard			Details
Product number: 5168 - Address 5196 - Diskette 5197 - Diskette 5198 - Audio Cassette 5199-F - Video Face 5199-5 - Video Spine 5260 - Address	Label informa Type: Height: Width: Page size:	ation Address 1" 2.63" Letter (8 ½ × 11 in)	New Label

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 selectged, your screen will look something like the one on the right (AFTER").

BEFORE

Create Labels	<u>? ×</u>
Choose the Insert Merge Field butto sample label. You can edit and form Sample Label box.	in to insert merge fields into the at the merge fields and text in the
Ingert Merge Field 🔹	Insert Postal <u>B</u> ar Code
Sam <u>p</u> le label:	
	_
	OK Cancel



Click on OK.

11. The Mail Merge Helper will reappear as follows:

Mail Merg	Mail Merge Helper ? 🗙				
The main button to	document and data source are ready to merge. Choose the Merge complete the merge.				
	Main document				
	Edit 👻				
2.0	Merge type: Mailing Labels Main document: Document5				
Zm	Data source				
	Get Data ▼ Edit ▼ Data: C:\\Customers12841				
3₫	Merge the data with the document				
	Query Options				
	Options in effect: Suppress Blank Lines in Addresses Merge to new document				
	Close				

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

12. The "Merge" dialog will appear.

Merge	<u>?</u> ×
Merge to:	Merge
New document Setup	<u>C</u> ancel
Records to be merged O All O From: Io:	Check <u>E</u> rrors
When merging records	Query Options
<u>Print blank lines when data fields are empty.</u>	
No query options have been set.	

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.

Document6 - Microsoft Word			_ 8 ×
File Edit View Insert Format Tools Table Window Help			
] D 😅 🖬 🖴 🎒 🔕 🖤 🕺 🖻 🛍 🝼 🔹 🖘 🍓 😿 D	🗆 🔜 🎫 🛷 🖾 ¶ 144% 🔹 😨 🗸		
Insert Merge Field - Insert Word Field - 🔛 H 4 1 🕨 H	📅 🖓 🎭 🍇 Merge 🖗 🛒 .		
Normal 🔹 Times New Roman 🔹 12 🔹 🖪 🗾	■ 扫田俳俳 □・┛・Δ・-		
L	· 🎽 🕴 · 3 · · · I · · · 4 · · · I · · · 5 ·	• • <u>■</u> <u>■</u> • • • 6 • • • <u>■</u> • • • 7 • • • <u>■</u> • • •	· 8 🗐 🖌
			_
			_
(First Name) (Last Name)	"Next Pecordy" First Name	"Nevt Pecordy First Name	
"Address"	«Last Name»	"I get Name»	~
«Address»	«Address»¶	"Address	
«City», «State» «Zip»	"City» "State» "Zip»	"Citym "Statem" Tim	
. 1	«eny», «btate» «zip» «	«eny», «state» «zip»	
«Next-Record»«First_Name»	«Next-Record»«First_Name»	«Next-Record»«First_Name»	c
«Last_Name»	«Last_Name»•	«Last_Name»	
- «Address»	Address»	t «Address»	
«City», «State» «Zip»	«City», «State» «Zip»	«City», «State» «Zip»	
· ¶	¶	¶	
«Next-Record»«First_Name»	«Next-Record»«First_Name»	«Next Record» «First_Name»	E D
· «Last_Name»¶	«Last_Name»¶	«Last_Name»¶	
- «Address»	x «Address»¶	c «Address»¶	
«City», «State» «Zip»	«City», «State» «Zip»¶	«City», «State» «Zip»	
I IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	ſ	1	
«Next-Record»«First Name»	«Next-Record»«First Name»·	«Next-Record»«First Name»·	— c
«Last Name»¶	«Last Name»¶	«Last Name»¶	
«Address»¶	«Address»¶	«Address»¶	
«City». «State» «Zip»	«Citv». «State» «Zip»¶	«City». «State» «Zip»¶	
¶	¶	¶	
= "Next Becordu/First Namou	"Noxt-Records "First Names.	" What Basardu // First Namou-	—, — ,
"I ast Names"	"I ast Nomen "	"I ast Name»	
· · · · · · · · · · · · · · · · · · ·	"Addross	"Addrosm"	-
"Citro "Staten""	"City" "State""	"(Citra) "Staten Zim	1
"	"	"	
			•
progen ber 1 1/1 jac u.s. in 1 Col 13 jREC jik	A 1-61 [29A] 🐸		

Screen Capture B

Labels3 - I	Microsoft Word			
ne cont yi h 🚅 🖬	ew insert romat joos igde window rep - 그 43 To 12 X Is FR 정 이 · 이 · 에 · M FM F	■ 🚜 🖾 🗨 144% 🔹 🖓 _		
ormal	Times New Roman ▼ 12 ▼ B ∠ U = = = =			
	X	* · 3 · · · · · · · · · · · · · · · · ·	. 5	· 8 # •
		3.6		
	John Sebastian	Marc LaFleur	Nick-Danger	5-
	100 Younger Girl Boulevard	80 Shadow Oak Dr.	Southerne MA 01776	
	Boston, MA-02215	Suddury, MA 01776	Suddury, MA-01776	
	1	1	1 1	
	Ω	Q	Ω	
	Antonio Bandaras¶	Artful·Dodger¶	Richard Nixon¶	۲.
	100-Philadelphia-Drive	555 Any Street	789 Watergate Blvd.	
	Philadelphia, PA-19107	Sudbury, MA 01776	Chester, IA 52134	
	1	1	1	
	Ω	Ω	Ω	
	George W. Bush¶	Ken Starr	Elliot Ness¶	C
	1600 Pennsylvania Avenue	200 Bustyasoon Ave.	50.Crimelab.Court¶	
	Washington, DC 20500	Washington, DC 20500	Chicago, IL 60601	
	4	ſ	ſ	
	Ø	Ø	Ø	
	Al-Capone	Alan Alda¶	Vinnie Babarino¶	κ.
	21 Garfield Place	Mobile Army Surgical Hosp.	Buchanan High School¶	
	Brooklyn, NY 11201	Los Angeles, CA 90002¶	Brooklyn, NY 11206¶	
	¶	¶	¶	
	¤	¤	a	
	Fat-Albert¶	Mister Rogers¶	Linda Tripp¶	c
	55·Da'·Hood¶	1 Wonderful Day Circle	115 Gossip Gate Lane	
	Brooklyn, NY 11206	Cambridge, MA 02138	Washington, DC 20001	
	ſ	1	1	
	a	a	a	
	(i i	

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.