

Service2000 Primer: Word 2002 (Office XP) Mail Merge for Mailing Labels

Requirements: Service2000 Marketing & Mailing Module, MS Word 2002 (comes with Office XP and MS Works Suite)

Overview

Service2000's Marketing & Mailing Module automatically opens MS Word 2002 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 2002 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 2002 from Office 2002. This procedure will differ somewhat in Office XP.

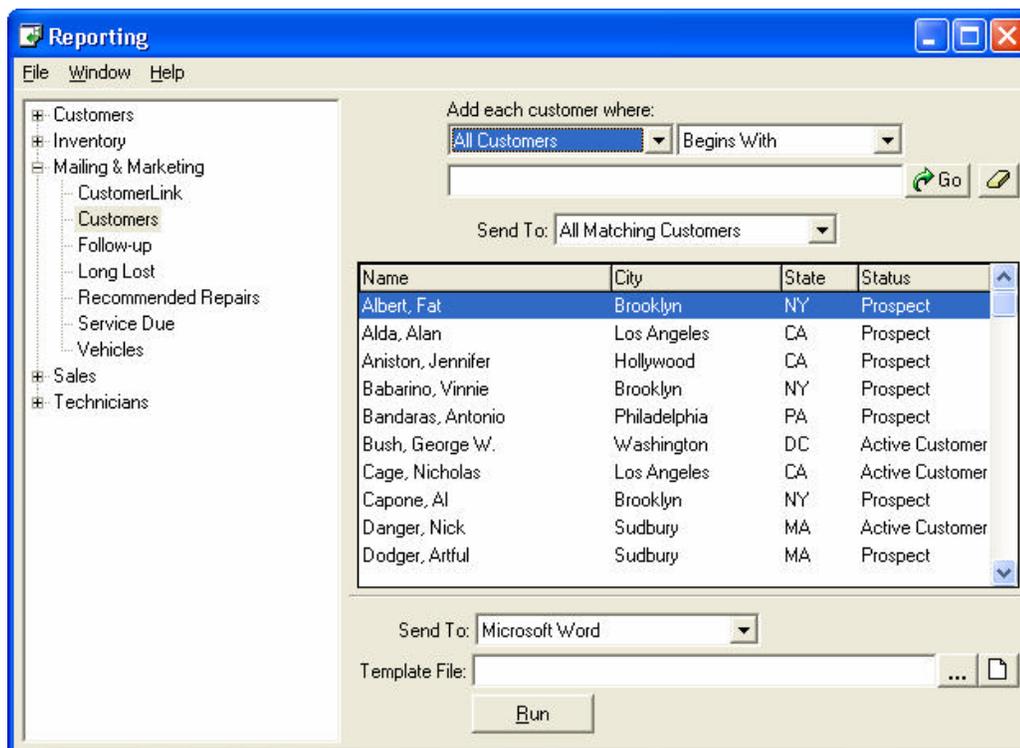
Disclaimer

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:



Selections

First Field: All Customers

Second Field: Ignore this field

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

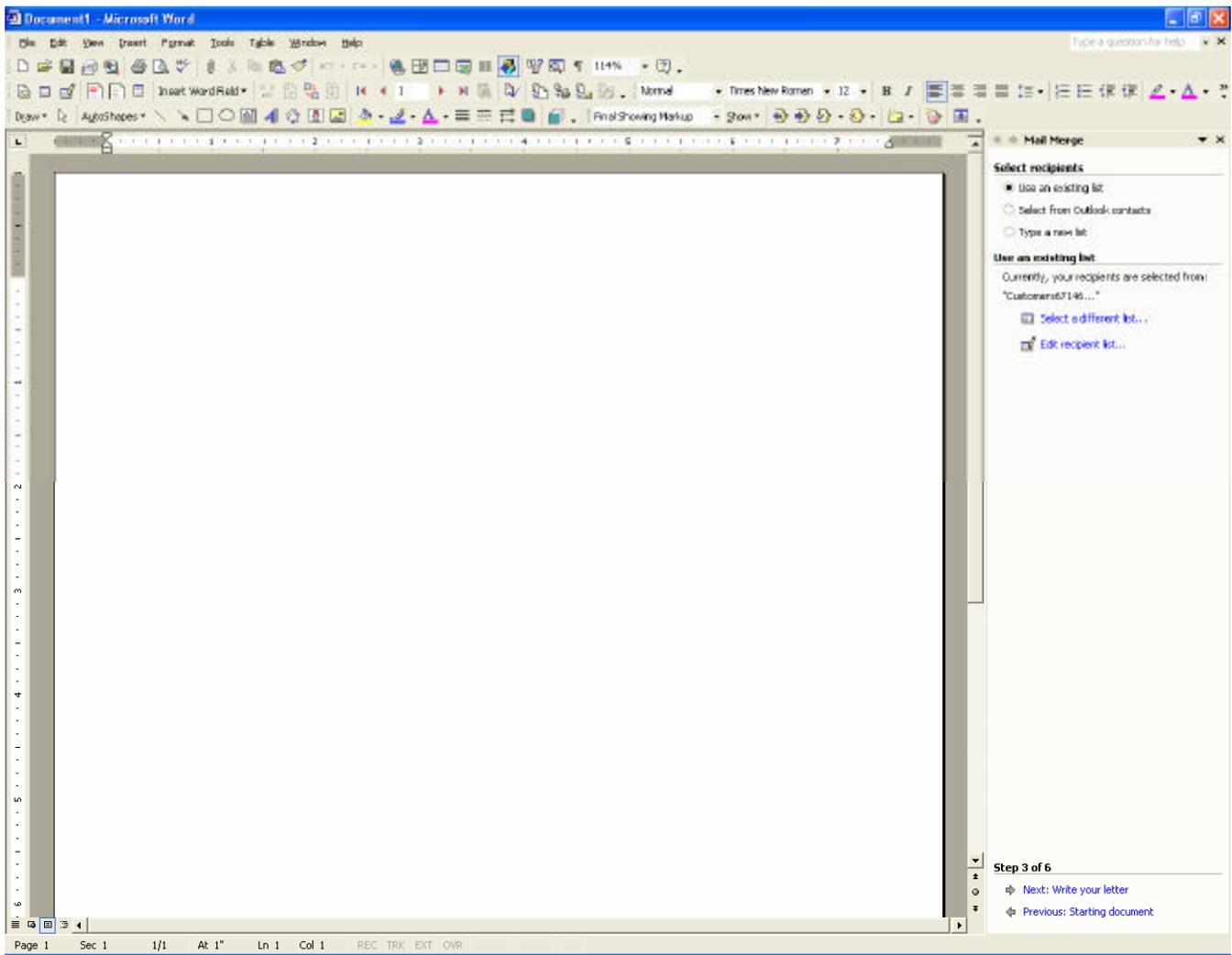
Third field: All Matching Customers

Fourth field: Microsoft Word

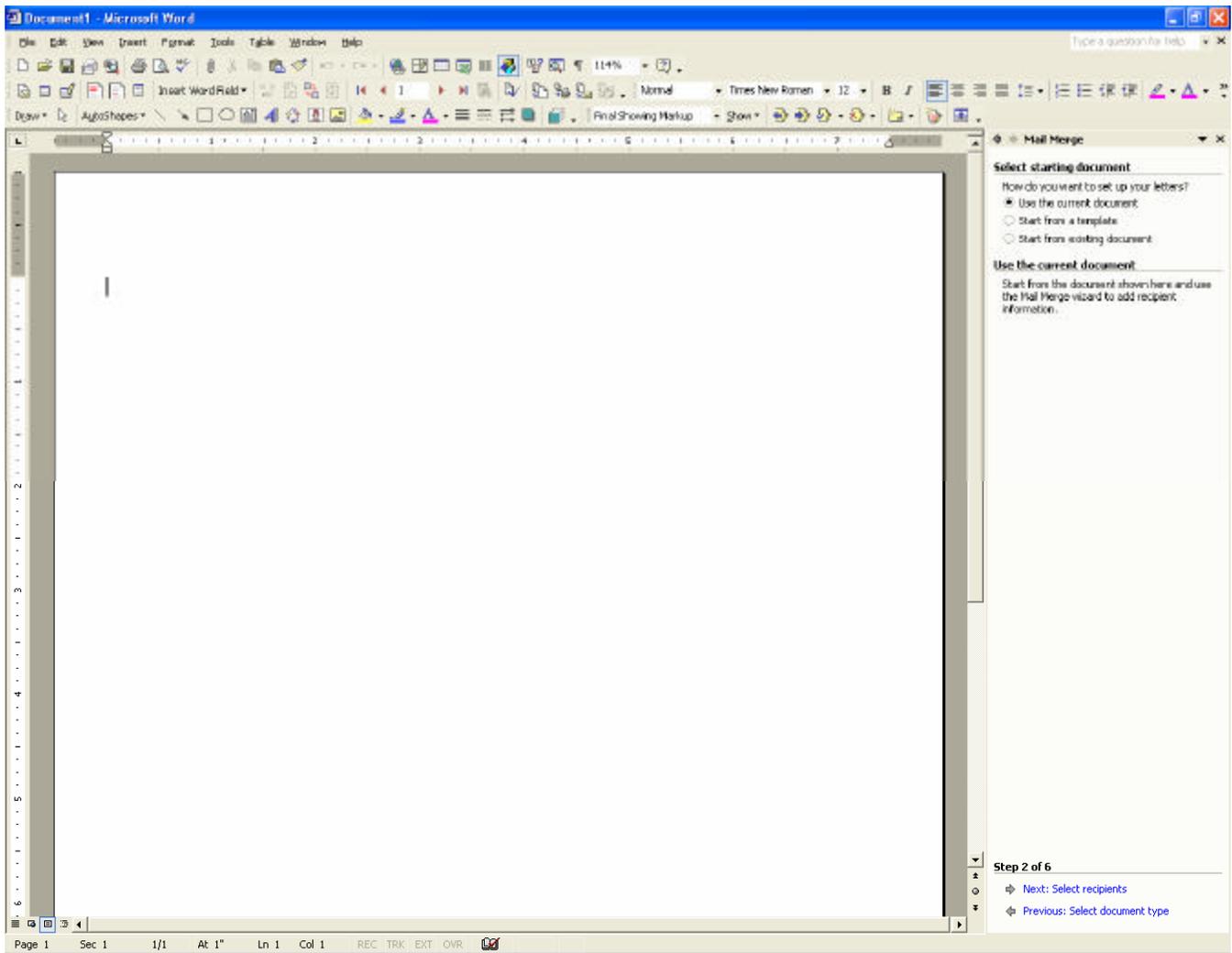
3. Click "Go" to run the sort. The customer names will appear approximately as shown.

4. Click on "Run". Word 2002 will open, but the screen will be blank.

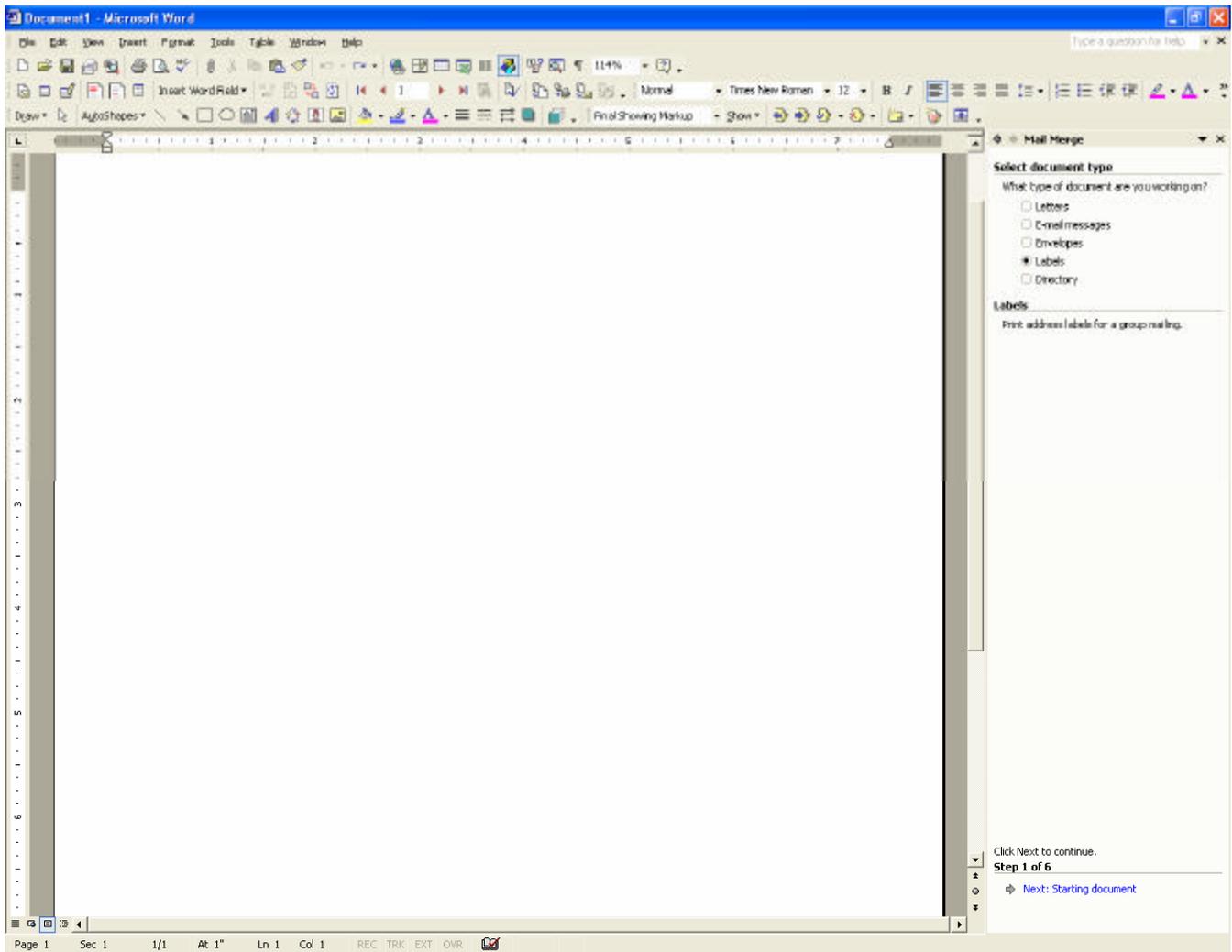
5. From within Word 2002, Click on Tools, Letters & Mailings, Mail Merge Wizard. The "Mail Merge Wizard" will appear as shown below on the right.
6. Click Previous: Starting Document in the lower right.



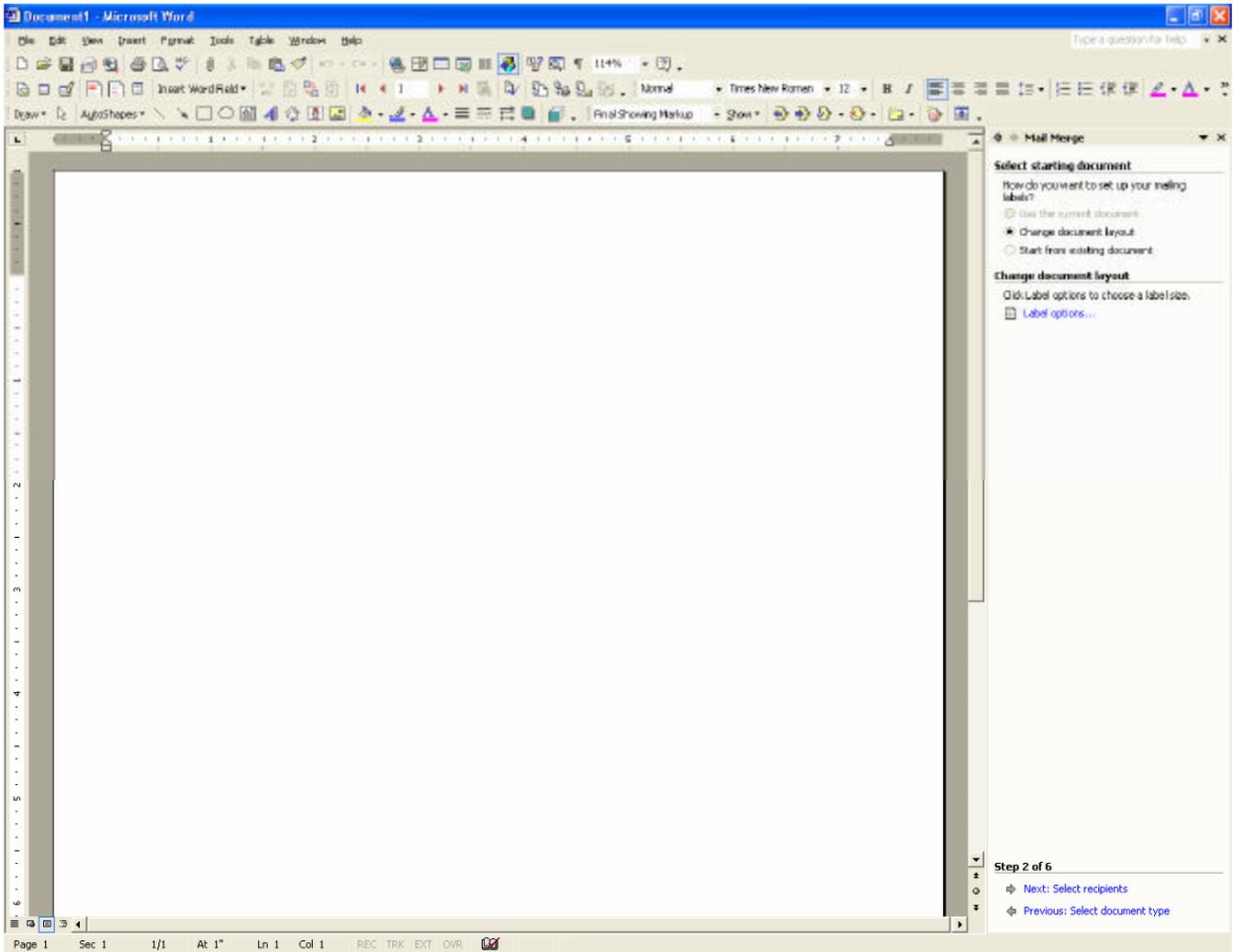
7. Click Previous: Select document type.



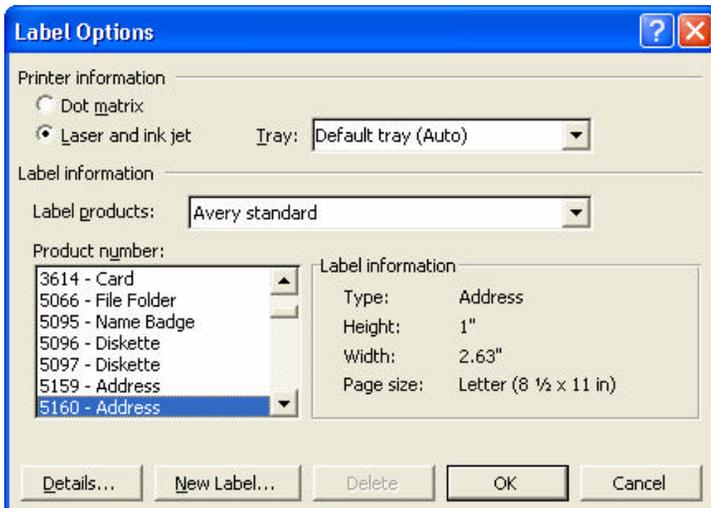
8. Select Labels from the list at the top right of the Mail Merge Wizard. Click on Next: Starting Document.



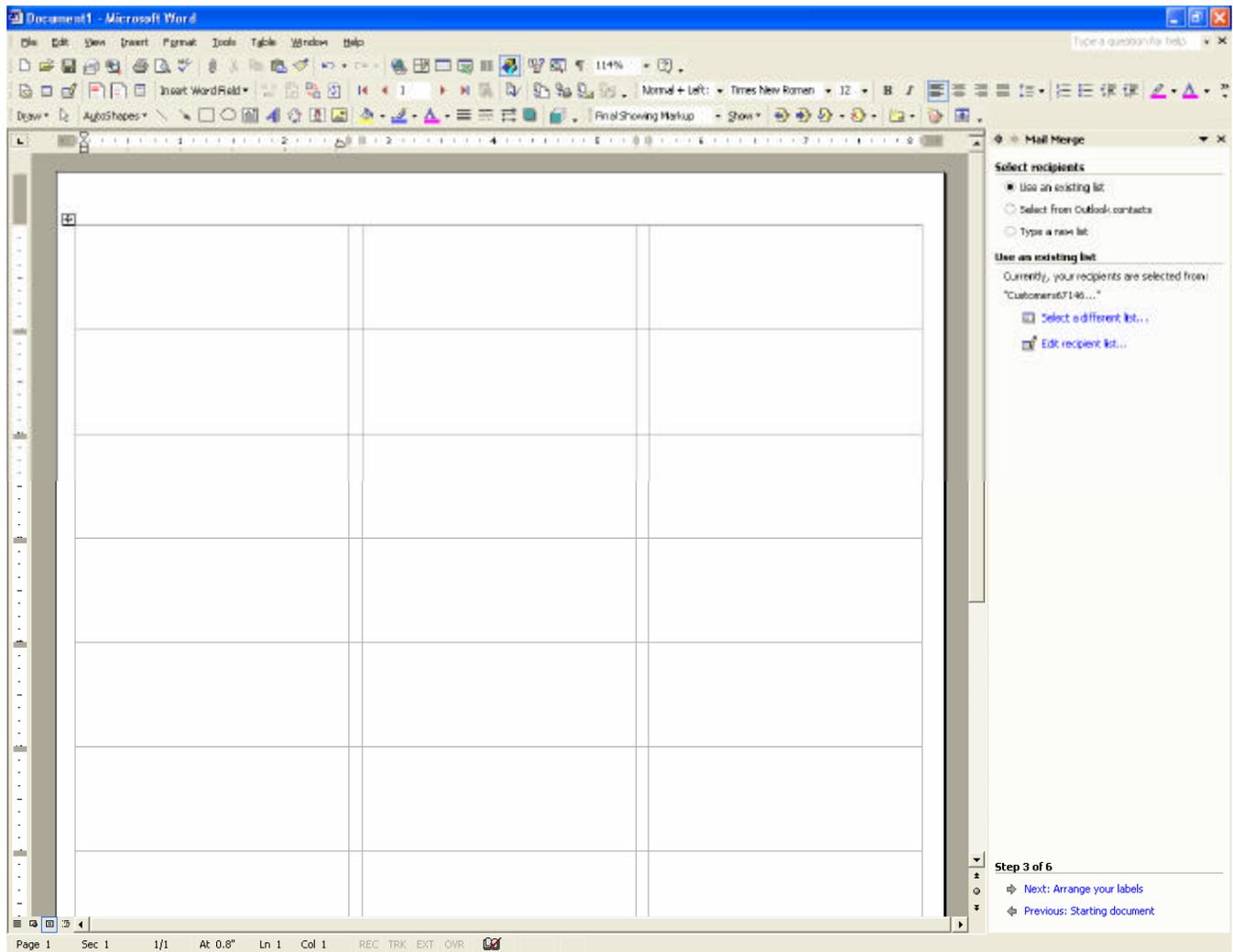
9. Click Next: Select Recipients.



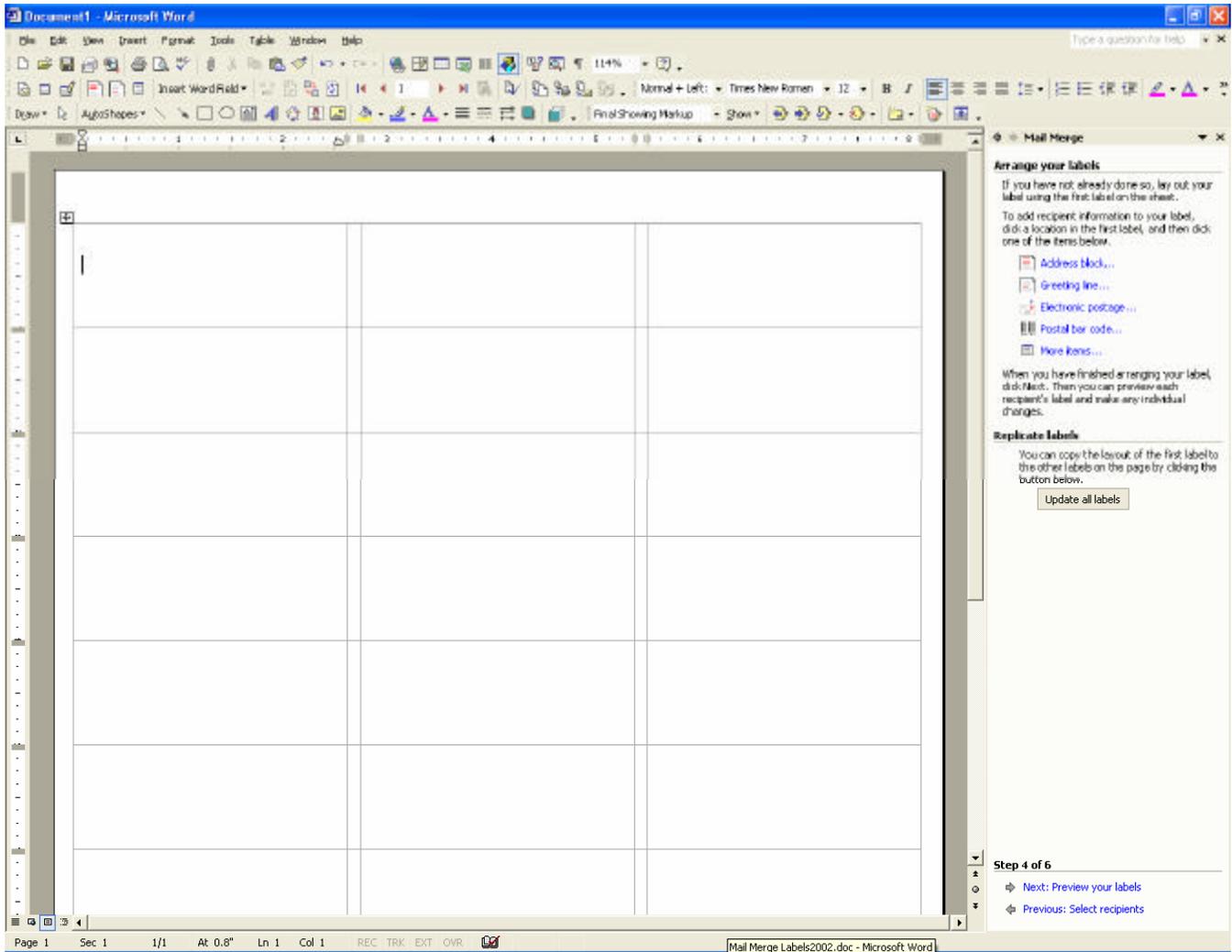
10. Select the Product Number for the labels you plan to use. The most common address labels used for mailing are the 5160 – Address labels, as shown selected in this screen capture. Many other options are available from this dialog – normally you don't need to make any selections and none are recommended or needed now. Click OK.



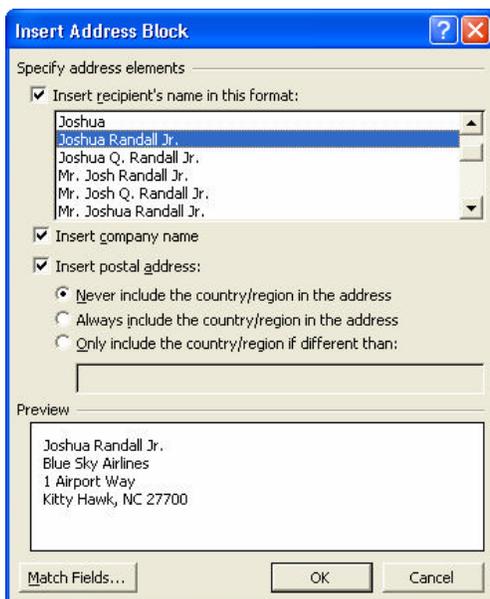
11. Click Next: Arrange your labels



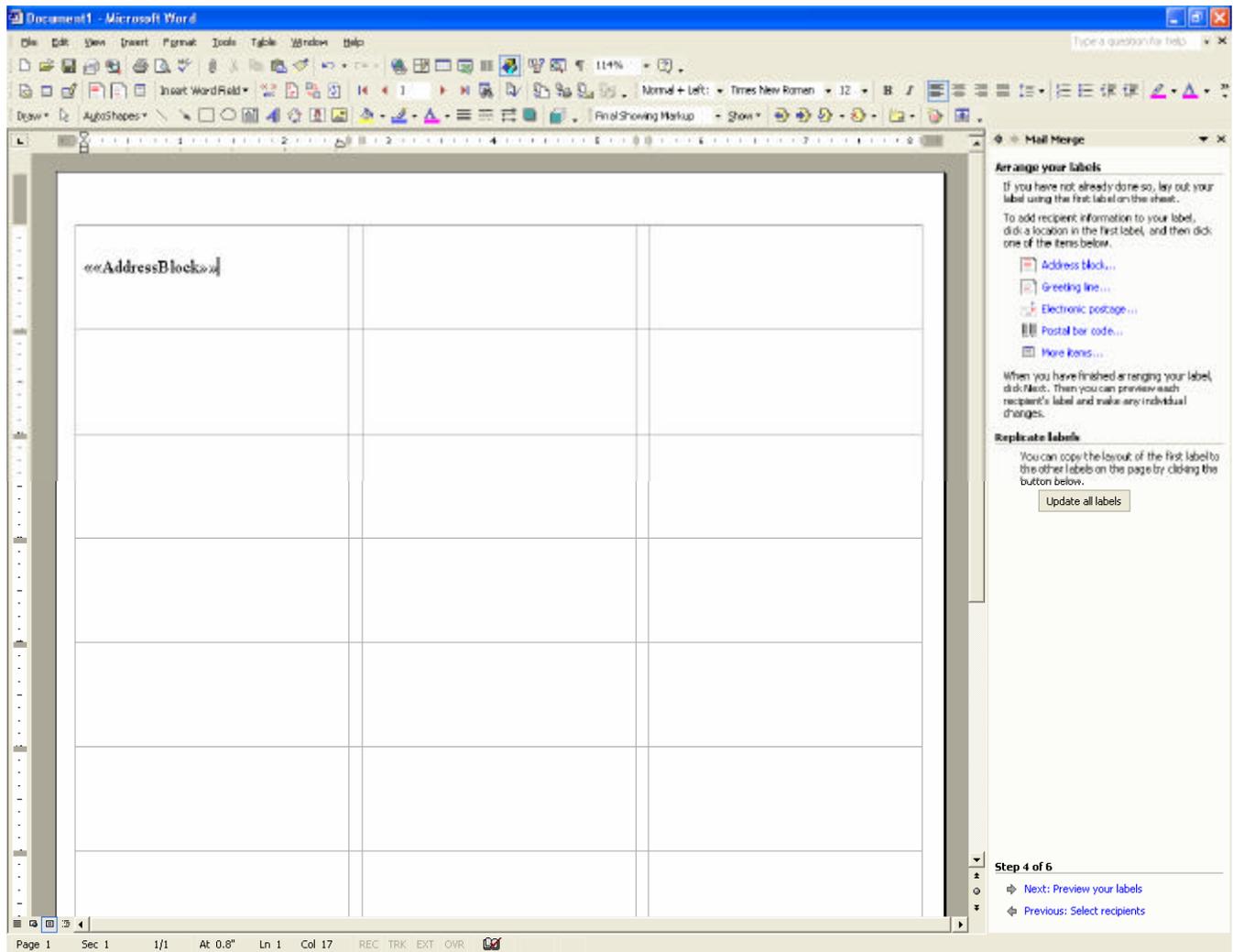
12. Click Address Block in the upper right of the Mail Merge Wizard.



13. Choose label format and click Ok



14. Click on Update all labels in the middle of the Mail Merge Wizard



15. Click Next: Preview your labels.

The screenshot shows the Microsoft Word Mail Merge interface. The main window displays a table with 7 rows and 3 columns. The first cell in the first row contains the placeholder «AddressBlock». The other cells contain the placeholder «Next Record» followed by «AddressBlock». The right-hand side of the window features a task pane titled "Mail Merge" with the sub-heading "Arrange your labels". This pane provides instructions on how to format labels and includes a list of options: "Address block...", "Greeting line...", "Electronic postage...", "Postal bar code...", and "More fonts...". Below these options, there is a section for "Replicate labels" with an "Update all labels" button. At the bottom of the task pane, it indicates "Step 4 of 6" and shows navigation options: "Next: Preview your labels" and "Previous: Select recipients". The status bar at the bottom of the window shows "Page 1", "Sec 1", "1/1", "At 0.8\"", "Ln 1", "Col 17", and "REC TRK EXT OVR".

«AddressBlock»	«Next Record»«AddressBlock»	«Next Record»«AddressBlock»
«Next Record»«AddressBlock»	«Next Record»«AddressBlock»	«Next Record»«AddressBlock»
«Next Record»«AddressBlock»	«Next Record»«AddressBlock»	«Next Record»«AddressBlock»
«Next Record»«AddressBlock»	«Next Record»«AddressBlock»	«Next Record»«AddressBlock»
«Next Record»«AddressBlock»	«Next Record»«AddressBlock»	«Next Record»«AddressBlock»
«Next Record»«AddressBlock»	«Next Record»«AddressBlock»	«Next Record»«AddressBlock»
«Next Record»«AddressBlock»	«Next Record»«AddressBlock»	«Next Record»«AddressBlock»

Mail Merge

Arrange your labels

If you have not already done so, lay out your label using the first label on the sheet.

To add recipient information to your label, do it a location in the first label, and then do one of the items below.

- Address block...
- Greeting line...
- Electronic postage...
- Postal bar code...
- More fonts...

When you have finished arranging your label, do **Next**. Then you can preview each recipient's label and make any individual changes.

Replicate labels

You can copy the layout of the first label to the other labels on the page by clicking the button below.

Update all labels

Step 4 of 6

- Next: Preview your labels
- Previous: Select recipients

Page 1 Sec 1 1/1 At 0.8" Ln 1 Col 17 REC TRK EXT OVR

16. Click Next: Complete the merge.

The screenshot shows the Microsoft Word Mail Merge interface. The main window displays a table with seven rows and three columns of recipient addresses. The 'Mail Merge' task pane on the right indicates 'Step 5 of 6' and provides instructions for previewing and editing labels. The status bar at the bottom shows 'Page 1', 'Sec 1', '1/1', 'At 1"', 'Ln 4', 'Col 17', and 'REC TRK EXT OVR'.

John Sebastian Lovin' Spoonful 100 Younger Girl Boulevard Boston, MA 02214	Marc LaFleur GenesisFour 80 Shadow Oak Dr. Sudbury, MA 01776	Nick Danger Firesign Theater 100 Beat The Reaper Drive Sudbury, MA 01776
Antonio Bandaras Mambo Kings 100 Philadelphia Drive Philadelphia, PA 19107	Artful Dodger 555 Any Street Sudbury, MA 01776	Richard Nixon Nixon & Co, Exq. 789 Watergate Blvd. Chester, IA 52134
George W. Bush United States of America 1600 Pennsylvania Avenue Washington, DC 20500	Ken Starr Whitewater Investigators 200 Bustyasoon Ave. Washington, DC 20500	Elliot Ness Untouchables, Inc. 50 Crimelab Court Chicago, IL 60601
Al Capone Brooklyn Navy Yard 21 Garfield Place Brooklyn, NY 11201	Alan Alda M.A.S.H. Mobile Army Surgical Hosp. Unit # 4077 Los Angeles, CA 90002	Vinnie Barbarino Sweathogs LTD Buchanan High School Brooklyn, NY 11206
Fat Albert Colby Kids & Company 55 Da' Hood Brooklyn, NY 11206	Mister Rogers Mr. Rogers Neighborhood 1 Wonderful Day Circle Cambridge, MA 02138	Linda Tripp The National Inquirer 115 Gossip Gate Lane Washington, DC 20001
Aurthur Fonzarelli Happy Days Studio 212 Grand PoohBah Court Milwaukee, WI 53203	Clint Eastwood Make My Day, Inc. 512 Madison County Road Madison, WI 53704	Harrison Ford 1000 Lost Ark Avenue San Francisco, CA 94103
Mel Gibson Braveheart Corp 5959 Lethal Weapon Lane	Anthony Hopkins Actors Guild, LLC 2121 20th Century Fox	Jeremy Irons Reversal Of Fortune, Inc 899 Lion King Terrace

Mail Merge

Preview your labels

Some of the merged labels are previewed here. To preview another label, click one of the following:

« Recipient: 1 »»

[Find a recipient...](#)

Make changes

You can also change your recipient list:

[Edit recipient list...](#)

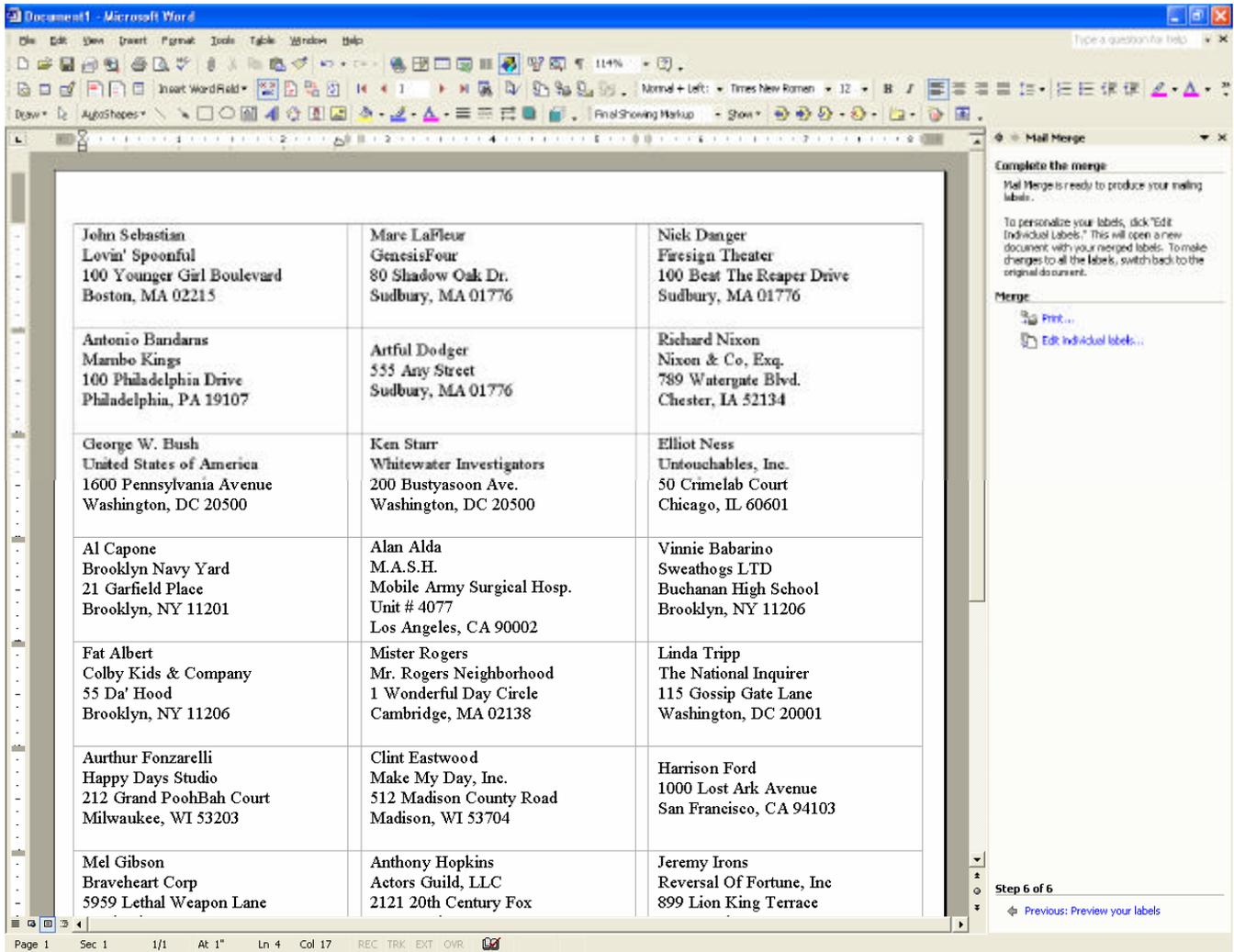
When you have finished previewing your labels, click Next. Then you can print the merged labels or edit individual labels to add personal comments.

Step 5 of 6

- Next: Complete the merge
- Previous: Arrange your labels

Page 1 Sec 1 1/1 At 1" Ln 4 Col 17 REC TRK EXT OVR

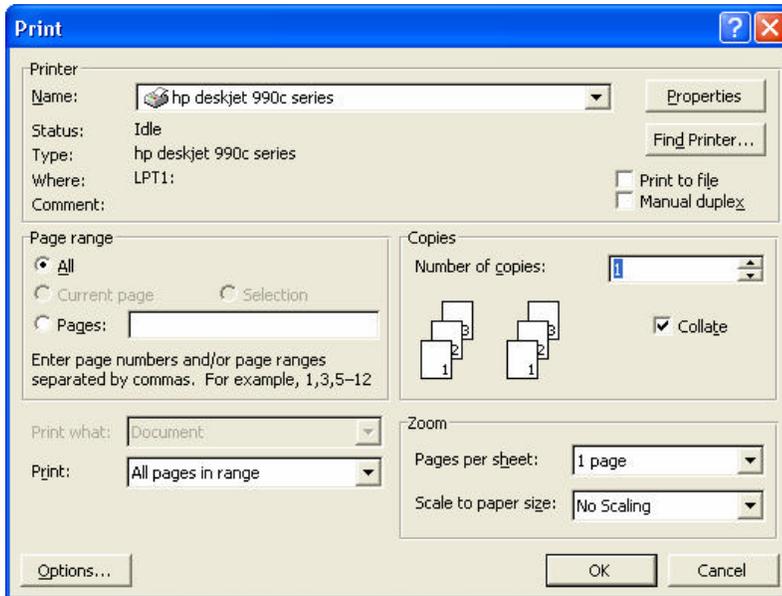
17. Click Print... in the middle of the Mail Merge Wizard.



18. Click Ok.



19. Choose appropriate printer and click Ok.



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.