

## Service2000 Primer: Word 2002 (XP) Mail Merge for Letters

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

### Overview

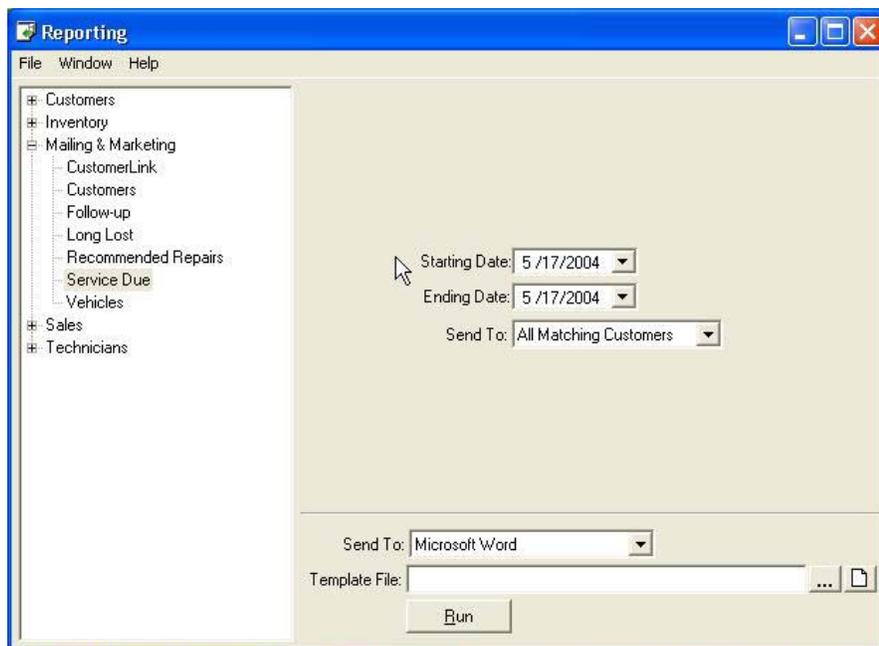
Service2000's Marketing & Mailing Module automatically opens MS Word 2000 and creates a mail merge within it. When creating letters, Service2000 must be pre-configured with a suitable Word template file. The following instructions will walk you through this step-by-step. Important: These instructions were written for use with MS Word 2002 (XP) from Office 2002. Service2000 is not tested with Office 97.

### Disclaimer

Please review "About Mail Merges" in Word's help before proceeding. 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, Service Due.
2. Create a list of names to be merged into letters as desired.



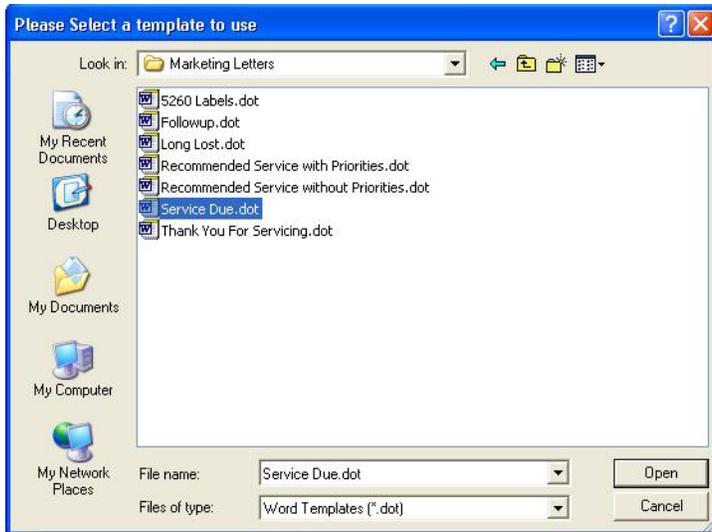
### Selections

First Field: Desired Starting Date

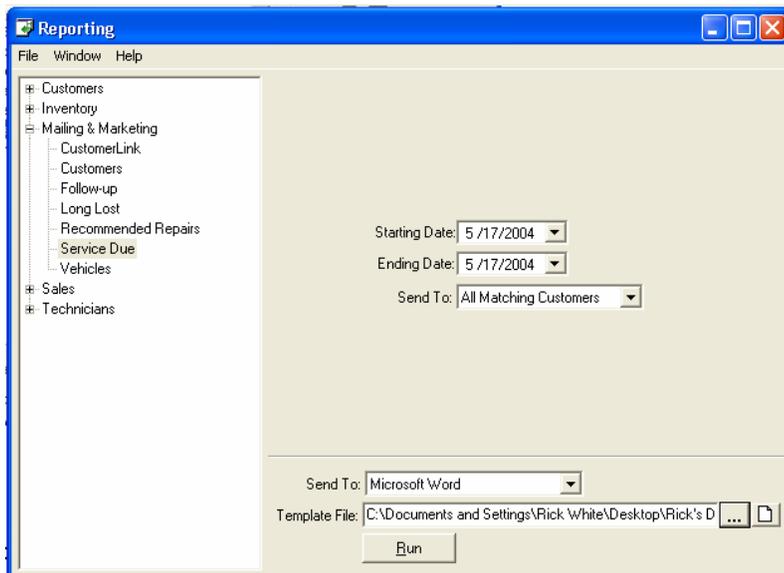
Second Field: Desired Ending Date

Third field: All Matching Customers

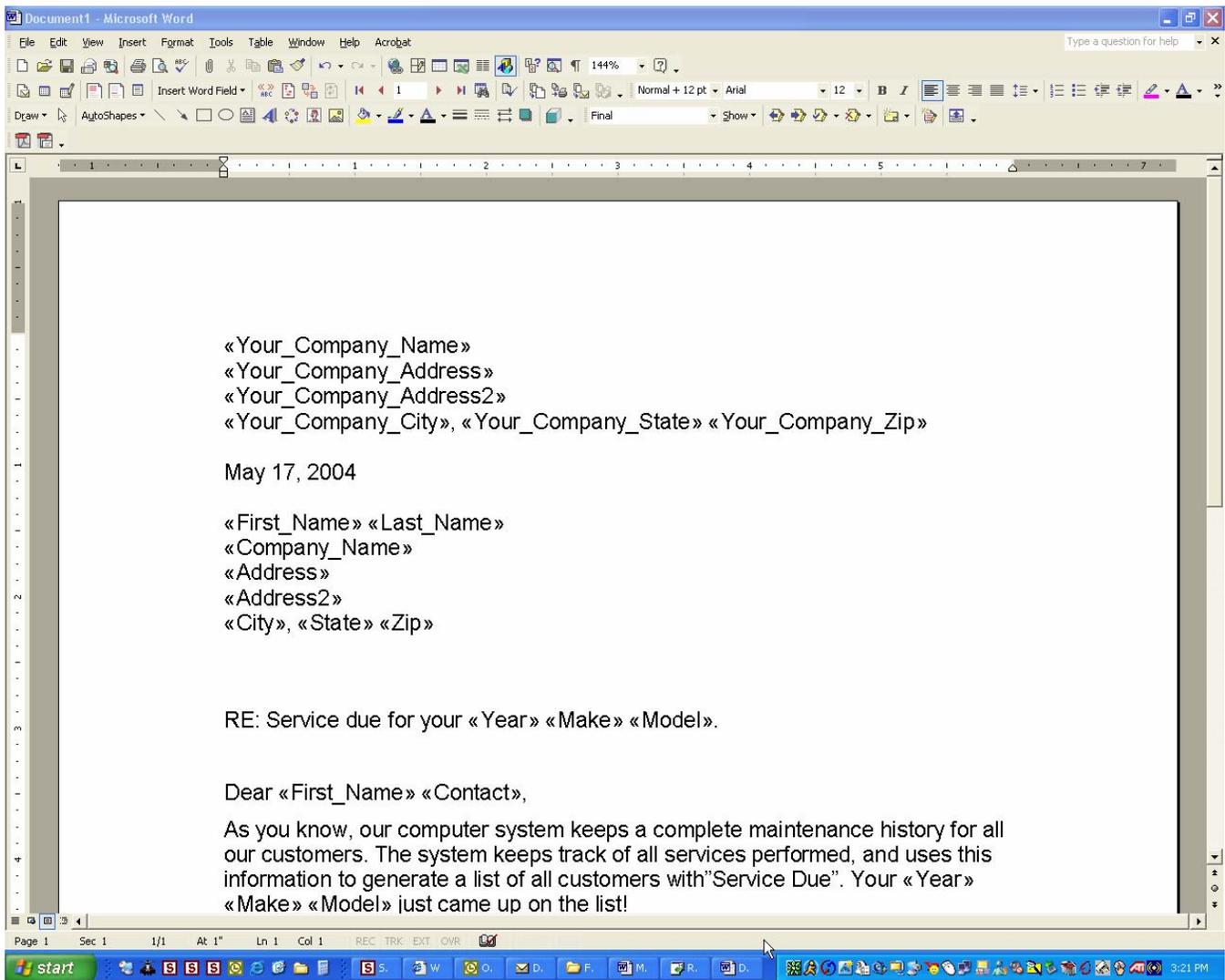
Fourth field: Choose existing template by clicking on first icon to the right of the field



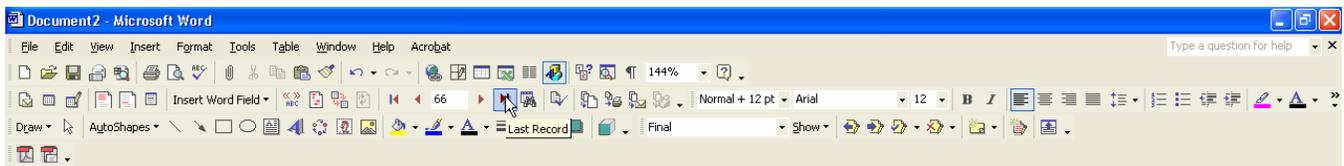
3. Click on the appropriate letter template and click Open



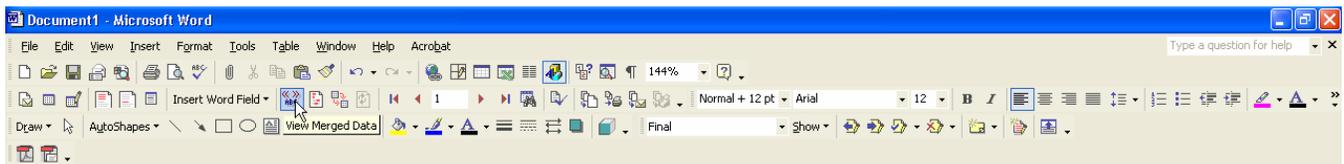
4. Click on "Run". Word 2002 will open displaying the template.



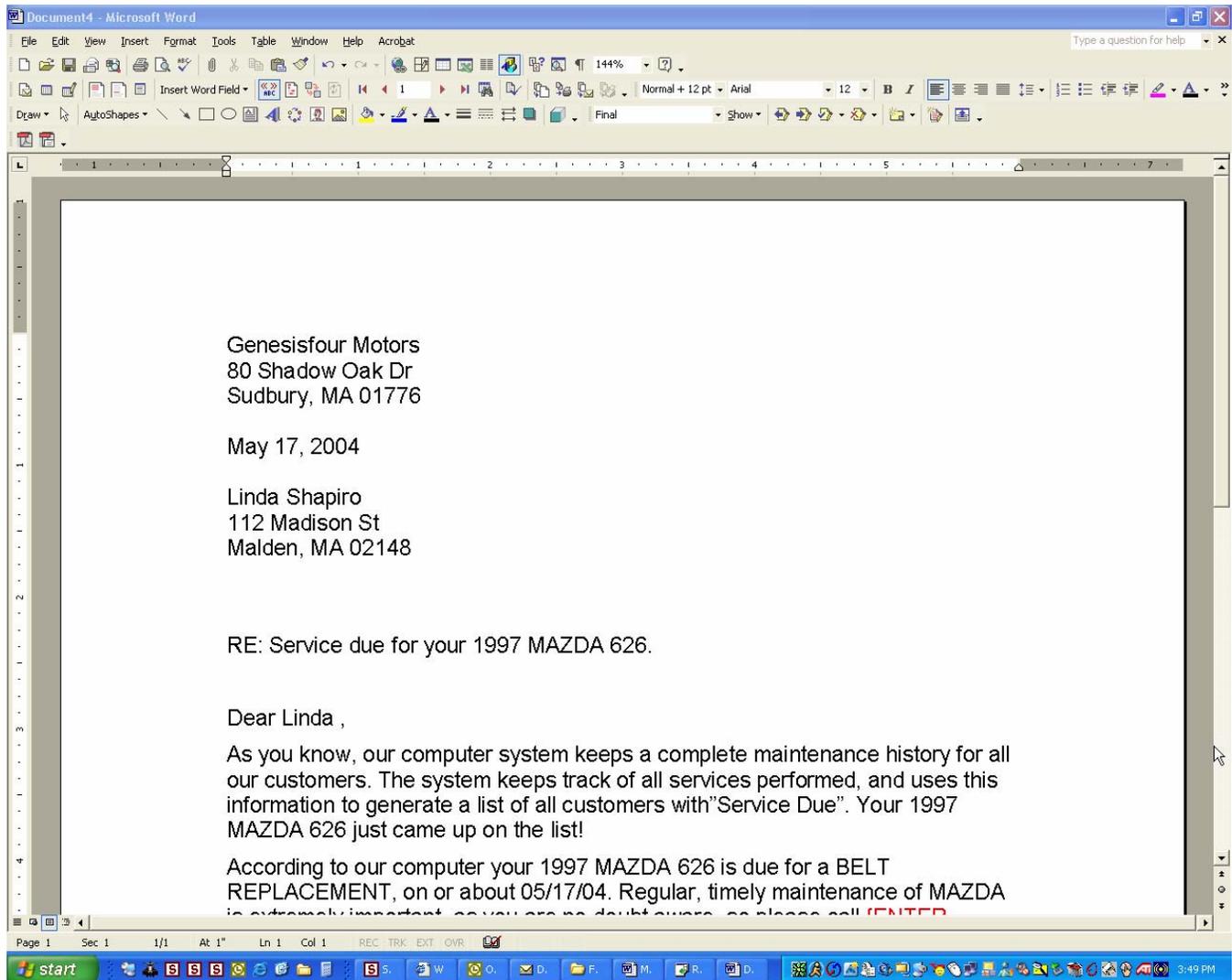
5. Click on Last Record icon to acquire letter count (66 in this example)



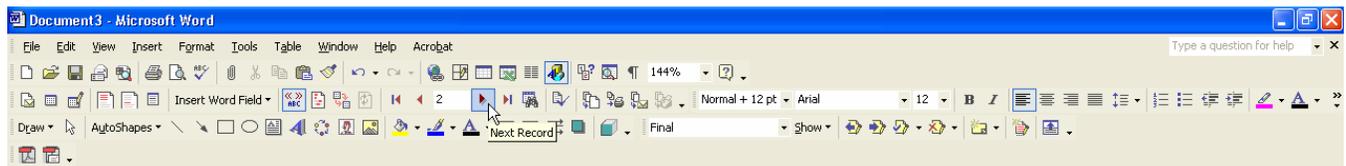
6. Click on View Merged Data icon



7. Word now displays template with Merge fields populated



8. If you would like to verify each letter before printing, click on the Next Record icon and review letter



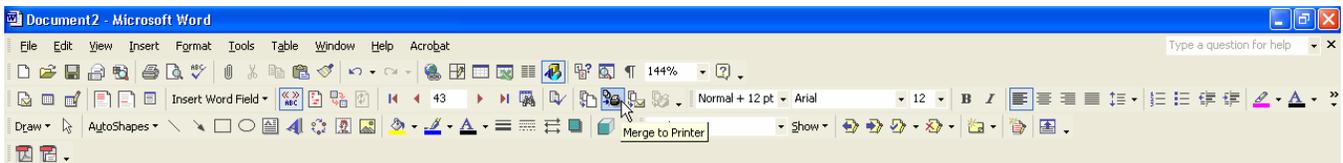
9. To email customers, click on the Merge to Email icon



10. Fill in a subject line for the emails, such as: "Important maintenance information regarding your vehicle from Genesisfour Motors!" and click Ok



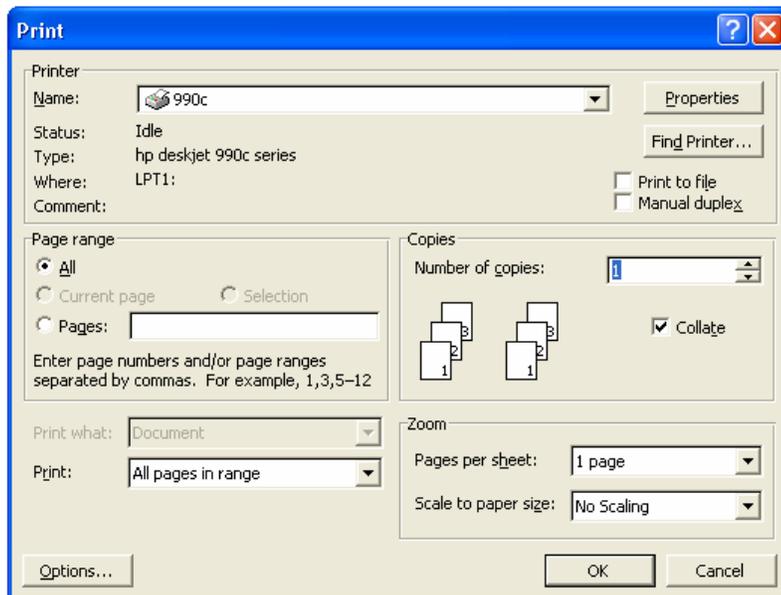
11. To print the letters, Click on the Merge to Printer icon



12. Click on Ok



13. Choose the printer and click Ok



You have successfully completed a mail merge mailing! The steps are similar with all the other mailings.