

## Chapter 18

### Use Mail Merge

#### 18-1. General.

a. Within ARISS you will be able to create letters and envelopes directly from your database information. Besides understanding this function, you need to know how to Create a List and use MS Word. If you need to know how to Create a List, review chapter 10, before attempting this function. This chapter will show you how to use MS Word with the Mail Merge function. Knowing how to utilize Mail Merge will help you with your direct marketing projects.

b. The following steps will show you how to use mail merge:

- (1) Create text file.
- (2) Open MS Word.
- (3) Create main document.
- (4) Get source data.
- (5) Identify merge fields.
- (6) Merge data from text file.
- (7) Print merged documents.

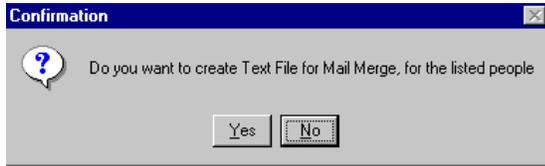
#### 18-2. Create text file.

a. You must have created a list and saved the list before you can use the Mail Merge function. So we will assume that you have created a list and are now ready to use Mail Merge. For example, you want to send a congratulation letter to your high school seniors, so you create a list and save it as "Senior List."

Priority	Next Action Dt	Status	Step Cd	Name	Address
000120		APPLICANT	FOLLOW UP	MALCOLM SPENCER MICHAEL	3320 E. U
000120		PROSPECT	FOLLOW UP	Logan, Kenneth Anthony	2091 E. L
000120		APPLICANT	FOLLOW UP	DANIEL RYAN SUGATA	1702 E. T

b. You will find the **Mail Merge** function on the **Find** screen. Once the **Find** screen opens, we will need to create a Senior List text file that can be merged into your MS Word document. Go to the **List** window and click on the drop-down arrow.

c. Select the list that you saved as **Senior List**. Click on **Find Now** to see the individuals that meet the criteria established in your list. Now click on **Mail Merge** in order to compile the senior list information and create a text file that will be used later with MS Word.



d. A message screen will appear asking you to confirm that you want to create a text file. Click on **Yes**. The application will automatically create your Text File and save it in your **Mail Merge** directory folder. Don't worry about the file yet, we will get it once MS Word is opened.



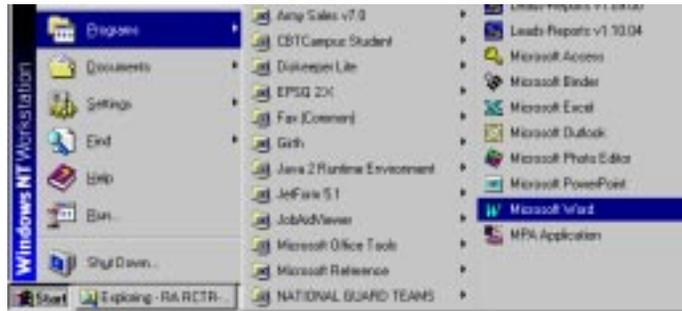
e. Click on **OK**. Now that your senior list is ready, you need to open MS Word to access Mail Merge.

f. You will need to exit the **Find** screen, but you do not want to exit the **ARISS-RWS Leads-Reports** application. Click on **Cancel** to exit the **Find** screen.

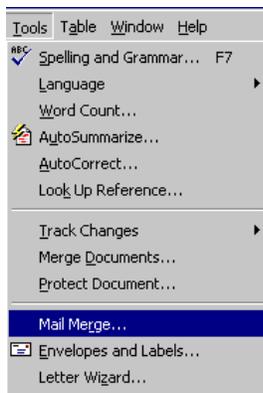
### 18-3. Open MS Word.

a. You will now find yourself at the beginning of the **ARISS-RWS Leads-Reports** application. Since you are going to open **MS Word**, you will need to minimize the **ARISS-RWS Leads-Report** application. Click on the **Minimize** icon  in the upper right-hand corner of the application.

b. Now, we need to open **MS Word**. If you have hidden your bottom menu bar, move your mouse to where the bar is hidden. When the menu bar appears, click on the **Start** button. You'll locate **MS Word** under the **Programs** option. Click on **Microsoft Word**.



### 18-4. Create main document.



a. Once **MS Word** opens you are now ready to create the document you want to send out to your seniors. Start by clicking on **Tools** on the menu bar and then click on **Mail Merge**.

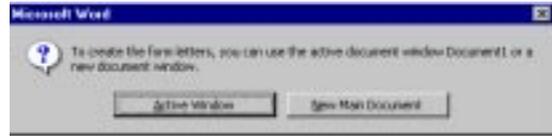
b. The **Mail Merge Helper** will appear to assist you in setting up your document. The first thing you need to do is choose what format you want your main document to be in. You're going to do a direct mailing to the individuals on the senior list you created. Since you need to create a new document for this mailing, you will click on the **Create** button. You'll be creating one letter, which will be addressed to everyone on the senior list.



✓ Notice that you can use Mail Merge to create the Mailing Labels and Envelopes for a mailing.



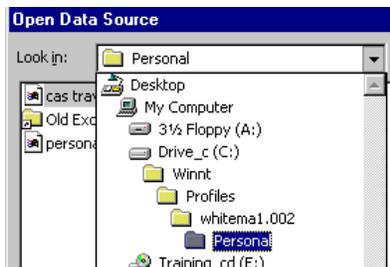
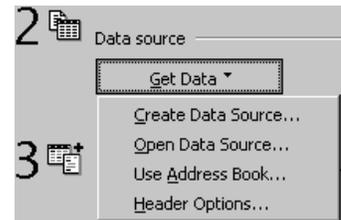
c. Click on **Form Letters** and then click on **Active Window**.



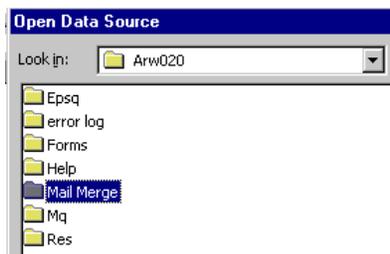
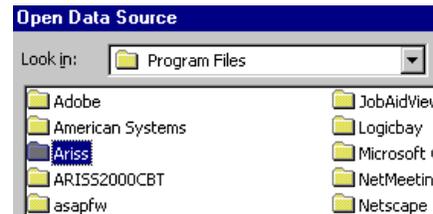
✓ You can click on **New Main Document** to retrieve an MS Word document that you have already created.

**18-5. Get source data.**

a. Now that you have selected your Main Document, you need to get your source data. Click **Get Data**. Remember we created our source data in the **ARISS-RWS Leads-Report** application, so now click on **Open Data Source**. This will start us on a journey to find the text file that we created earlier. In order to find the text file you created, you need to access C:\Program Files\ARISS\ARW020\Mail Merge. So let's do that now.



b. Start by clicking the drop-down arrow in the **Look in** window. Click on the **Drive\_c(C:)** so we can find the folder called **Program Files**. Now double click on the **Program Files** folder to display additional folders and files. You will see a folder called **Ariss**. Double click on the **Ariss** folder to display its folders and files.



c. Once **Ariss** appears in the **Look in** window, you will need to double click on the **Arw020** folder to view its folders and files. This is where the **Mail Merge** folder is located. Double click on the **Mail Merge** folder to access the text file that you created in **ARISS-RWS Leads-Reports** application.

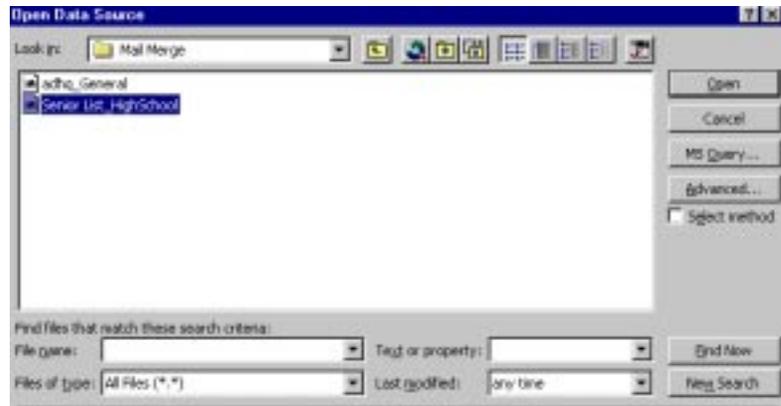
d. You will not see the **Senior List** file at this point. The **Senior List** file you created was not saved as a Word document (.doc) file, but as a text (.txt) file. You'll need to see all the files contained in the **Mail Merge** folder.



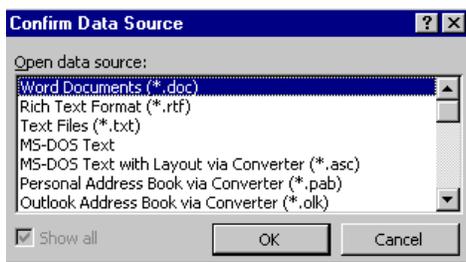
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e. Click the **Files of type** drop-down arrow. Click on **All Files (\*.\*)**. You will now see your **Senior List** file. Highlight the file and click on **Open**.

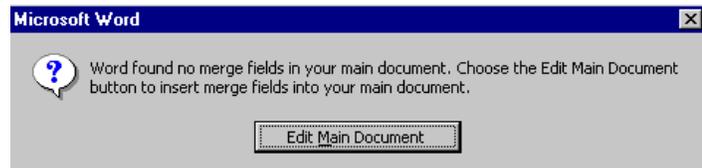
f. Are you confused yet? It may seem like this is a difficult process, but you are almost finished.



g. Click on **OK** to **Confirm Data Source** and keep it as a Word document file.



h. Now click on **Edit Main Document**. This task requires you to format the letter you will be mailing. To format this letter you will be linking your **Senior List** text file information into your letter. Using **Mail Merge** will save you hours of addressing letters and envelopes.



✓ Remember to use a business format style for your letter. Also, you may need to have your Rctg Bn advertising and public affairs personnel review the letter before you send it.

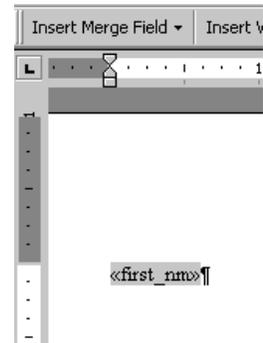
### 18-6. Identify merge fields.

a. All that is left is to create the letter to your seniors and to format the letter to insert the information from your **Senior List**. You will need to locate the **Insert Merge Field** drop-down arrow to format the letter.



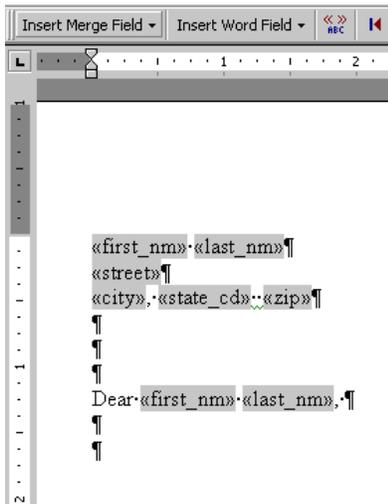
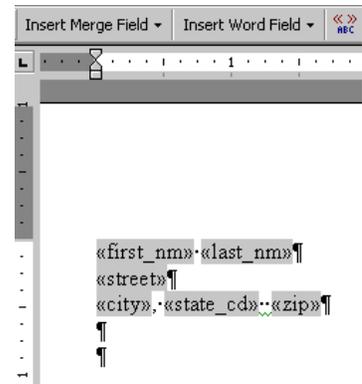
b. The opening information you include on your letter is the name and address of the individual you will be sending the letter to. The first line should include fields for the person's first name and then his or her last name. Start by clicking on the **Insert Merge Field** drop-down arrow.

c. Take a moment to review the list of merge fields you can choose to link to your letter. You can even include a telephone number field when necessary. Click on **first\_nm** field. You have just created the field that will link the first name information from your original **Senior List** to this letter format. Now before you put in a last name field, you're going to need to put a **space** after the **first\_nm** field. If you do not insert the **space** your last name field and first name field will be attached. To put in a **space** to separate the first and last name, use your computer keyboard and press the **space bar** once.



d. Now the letter format is ready to have you create the field for the last name. Click on **Insert Merge Field** and then click on **last\_nm** to insert the last name. You've completed addressing the first line of your letter. Now press the **Enter** key on your keyboard to start the next line and enter the address. You will continue this process to format the letter with the information from the **Senior List**.

e. Here is an example of what a completed address format looks like. In business letter format, we've added four line spaces after the end of the address to begin the text portion of the letter. Remember, each time you need to add a field you click on **Insert Merge Field**, select the field required, and then use your keyboard for line and space formatting.



f. Next you will fill in the salutation information and begin the letter. For example, begin your letter with the **“Dear”** salutation. After you've entered a salutation, add a **space** by using your keyboard. Then click on **Insert Merge Field** and now click the field for entering the **first\_nm**. Just as before click on the **Insert Merge Field** to format the information you want on the letter. After you've entered the first and last names, to keep within letter format, you'll enter a **comma**. Double-space before beginning your letter. Now you need to type the body of the letter and finally end the letter with your signature. It is important to remember to use your keyboard to insert punctuation, spaces, and line formatting when needed. If you make any errors when inserting the data just highlight the information and press the **Delete** key, then reenter the information in the correct location.

g. Now that you have formatted your letter with the data from your **Senior List**, you are now ready to finish the **Mail Merge**. Click on **Tools** on the menu bar and then click on **Mail Merge**.



**18-7. Merge data from text file.**



a. The **Mail Merge Helper** will appear. Click **Merge** to insert the **Senior List** data into the document.

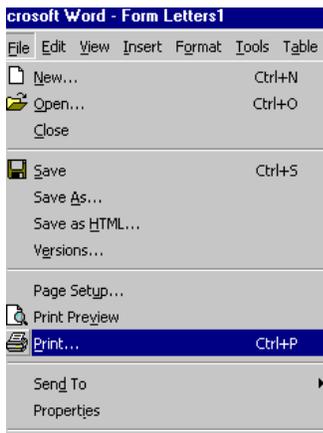
b. Notice in the **Merge to** window you're merging to a **New document**. Click on **Merge**. Your letter will now reflect the information from your **Senior List** and show a complete letter. Notice at the bottom of the screen, the page numbers will increase to the number of names that are on your list.



**18-8. Print merged documents.**

a. Now you're ready to print and save your files. If you are familiar with MS Word then print and save your files. If you are not, follow the remaining steps.

b. Click on **File** on the menu bar and then click on **Print**. Now that you've printed your list, you need to save it for future mailings. Click on **File** again from the menu bar. Since this is a new list, you need to click on **Save As**. The program should default to your **Personal** folder, but you can save the document in any folder that you wish. Once you have opened the folder, enter the file name and click on the **Save** button. You are now finished with **Mail Merge**. To quit MS Word, click on **File** on the menu bar and then click on **Exit**.



c. If you want to use the letter again, instead of creating a new document, use the file you just saved with the Senior List.

✓ Remember that every time you bring up the Senior List from the ARISS-RWS Leads-Reports application and click Find Now that it will bring up a new list of the records in your database. Follow the above steps and you will always have your letters ready to send out.