

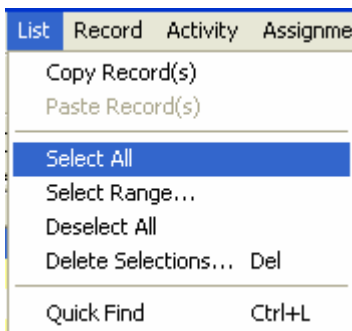
What Is a Mail Merge File?

A Mail Merge file is a data file used in your Word Processing program to generate customized labels, letters, envelopes, reports, etc. Please note: It is not necessary to create an export in order to print from ContactEase, however many users prefer to added flexibility of working with an export file in Word Processing.

Each exported field can then be merged in a template document to create custom letters, labels, etc.

Records to Export

The export function will only include specifically selected records. Therefore, you must select the records from the results list of any search by using the Shift/Click key combination; or using the Select All option (Ctrl + A, key combination). You can also use the Select All or Select Range function from the List menu.



Select All: will highlight all the records in the Result List.

Select Range: will permit you to select a range of records from the Result List.

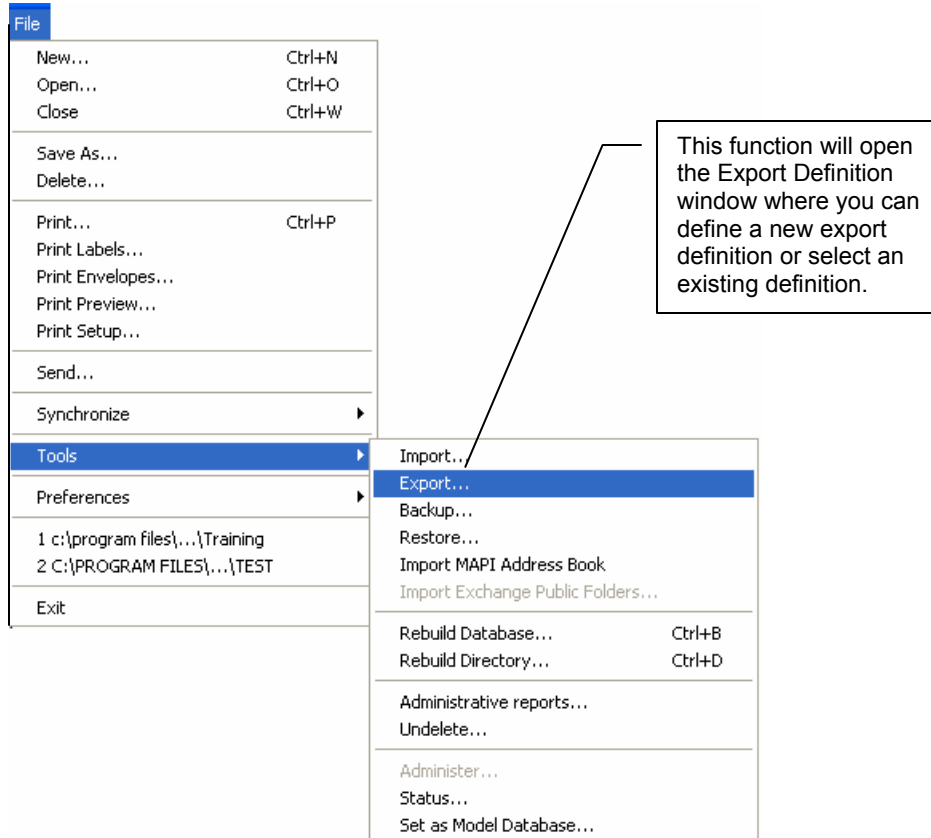
Only *Selected* records will be included in the Mail Merge file.

After selecting the records to include in the Mail Merge you can now run the export function of ContactEase to generate the file.

Creating and using a Mail Merge (Export) File

Create a Mail Merge File (Export File)

Under the File menu choose the Tools function and then Export.



You can use the *Export* function to create any type of export file for use in any database application (Word Processing, Spreadsheet program, etc.).

Creating and using a Mail Merge (Export) File

Export Definition

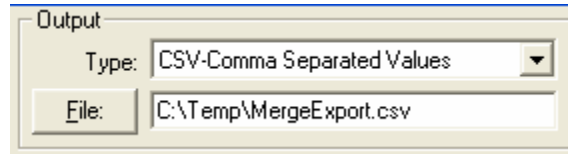
Use this screen to define not only the fields to export but also the format of the export file. Note: Check the box to include field names – this makes inserting a merge field easier when defining the Main Document.

The screenshot shows the 'Export' dialog box with the following sections:

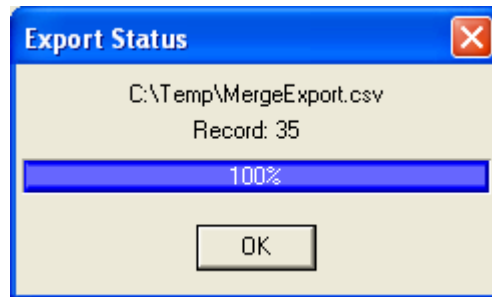
- Export:** Radio buttons for 'All' and 'Selections'. Checkboxes for 'Remove CR/LF', 'Change CR/LF to CR', 'Keep CR/LF', 'Include Field Names', and 'Enclose in "Quotes"'. A callout box points to the 'Include Field Names' checkbox with the text: "Be sure to check selections, or All of the records in the database will be exported."
- Output:** A dropdown menu for 'Type' (set to 'TXT-Word merge file') and a 'File' text box (set to 'C:\My Documents\Newsletter2.txt'). A callout box points to the 'Type' dropdown with the text: "Enter a new name (to define a new format), or use the drop-down to select a previously defined export layout. If you enter a new layout description, the definitions will be saved under that name automatically."
- Layout Description:** A dropdown menu (set to 'Mail Labels') and a 'Remove' button. A callout box points to this section with the text: "Choose the appropriate file type:
 - CSV (comma separated values)
 - TXT Word Merge File
 - TXT Tab separated File
 - MRG Word Perfect Merge File
 - DBF dbase II
 - DBF dbase III
 - WKQ Quattro
 - WKS Lotus 123
 - WR1 Symphony; or
 - XLS Excel.
 Check with your firm's Word Processing program to determine the best *Output Type* to use. Generally, *CSV Coma Separated Value*, *TXT Word Merge (MS Word™)* or *MRG Word Perfect™* are your best options."
- Fields to export:** A list of fields including 'First Middle Last, Suffix', 'Title', 'Company', 'Mailing Address Street', 'Mailing Address City', 'Mailing Address State', 'Mailing Address Zip', and 'Mailing Address Country'. A callout box points to this list with the text: "Enclosing text in quotes can resolve issues with commas within a name field. If using this for a Word merge you MUST include field names. It may be necessary to define what to do with carriage returns (CR) or line feed (LF) characters in the text."
- Database Fields:** A list of fields including 'ContactID', 'First Middle Last', 'First Middle Last, Suffix', 'Last,First Middle', 'Last First Middle', 'First', 'Middle', 'Last', 'First Middle', 'First Last', 'Salutation', 'Prefix', and 'Suffix'. A callout box points to this list with the text: "Select the fields to export from a list of available fields in the ContactEase database. Use the <<Add button to include that field in the export list. You can also use the Up and Down buttons to position the fields in the file. Click the Export button to generate the Export File (using the Output Type and File Name specified). Use this file in your word processing application to perform the Mail Merge."

Creating and using a Mail Merge (Export) File

Type in the path of the file followed by a file name (be sure to use the file extension so that it can be more easily opened) or use the File button to locate a file path.



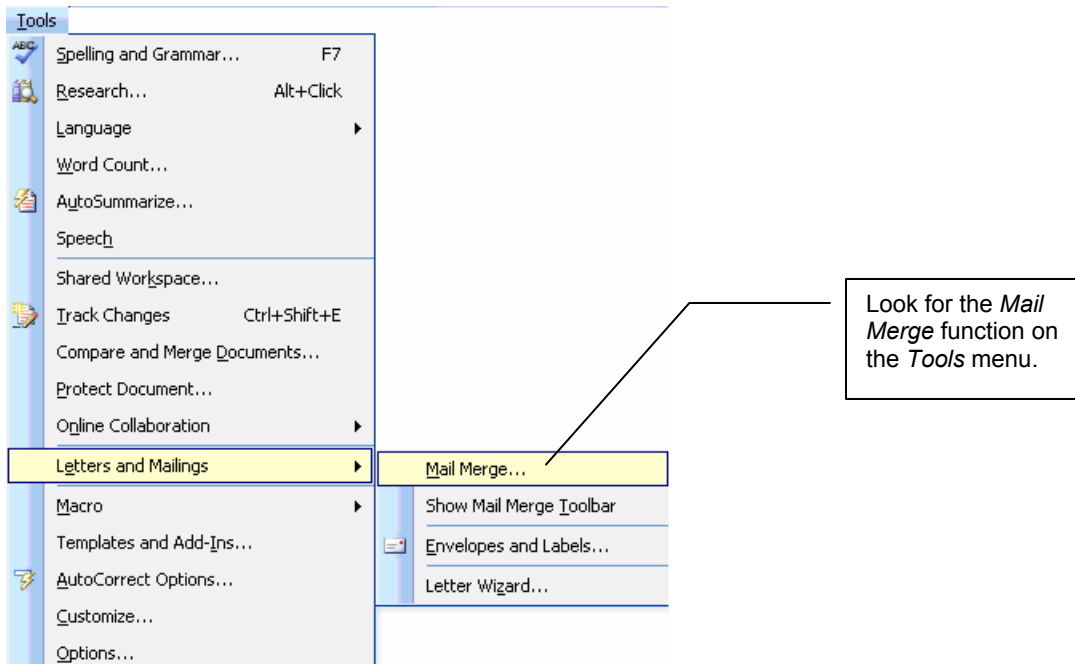
After defining the export file, click the Export button. A status window will appear indicating the progress of the export. When it is complete you will see a window like that displayed below. You can click OK to end the process – you can then access the file for processing.



The following steps are an example of how to use the export file created. The steps below are unique to Microsoft Word™ Version 2003 and may not be the same for other Word Processing applications or other versions of Word.

Open Word Processor

In Microsoft Word 2003 you can select the Tools Menu to activate the Mail Merge function.



Mail Merge Guide

The Mail Merge Guide is a 6-step prompt aimed to navigate users through the various merge options. Options include: Letters; E-Mail messages; Envelopes; Labels; and Directory.

Creating and using a Mail Merge (Export) File

Prompt 1

Select document type

What type of document are you working on?

- Letters
- E-mail messages
- Envelopes
- Labels
- Directory

Letters

Send letters to a group of people. You can personalize the letter that each person receives.

Click Next to continue.

Step 1 of 6

Next: Starting document

1) Select Letters

2) Click Next

Prompt 2

Select starting document

How do you want to set up your letters?

- Use the current document
- Start from a template
- Start from existing document

Use the current document

Start from the document shown here and use the Mail Merge wizard to add recipient information.

Step 2 of 6

Next: Select recipients

Previous: Select document type

3) Select "Use the current document" or open an existing template.

4) Click Next

Step Indicator

Creating and using a Mail Merge (Export) File

Create a Main Document

Create this document like any other document. Note: Complete the “constants” of the document; that is, all information will be the same for each printed document.

Leave the address information blank as well as the salutation. This information will come from the data file.

PO Box 20892¶
Phoenix, AZ 85036-0892¶
¶
41 Avenue B — Suite 2D¶
New York, NY 10009¶
¶
(646) 602-8790 — Phone¶
(212) 751-4720 — FAX¶
info@1ecorp.com — E-mail:

¶
¶
March 22, 2002¶
¶
¶
Dear¶
¶
Thank you for registering for the ContactEase™ training class to be held on Tuesday, April 16, 2002, to be held at the Intercontinental Hotel, New York City, 111 E. 48th St., beginning at 10 AM.¶
¶
Included with this letter is a course outline along with a list of area hotels, restaurants and other attractions that you might find interesting during your stay in New York. If you require any additional travel assistance please give us a call.¶
¶
We look forward to your attendance and with meeting you personally.¶
¶
Sincerely,¶
¶
¶
¶
David B. Chatburn¶
¶
enclosures ¶
¶

Creating and using a Mail Merge (Export) File

Prompt 3

5) Select "Use an existing list"

6) Select "Browse". Select the exported file.

7) Click Next

Step 3 of 6

- Next: Write your letter
- Previous: Starting document

Prompt 4

8) Select the "Address block" and/or "Greeting line". Note: Follow Instructions per option.

Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

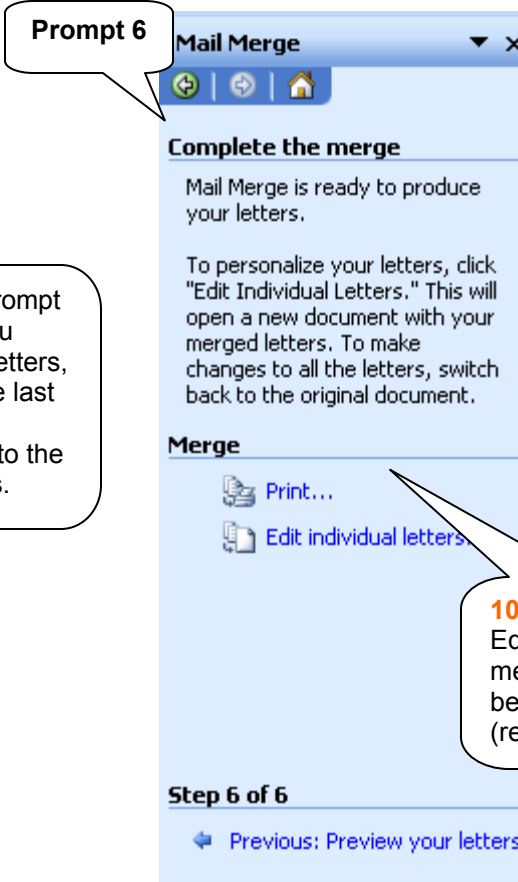
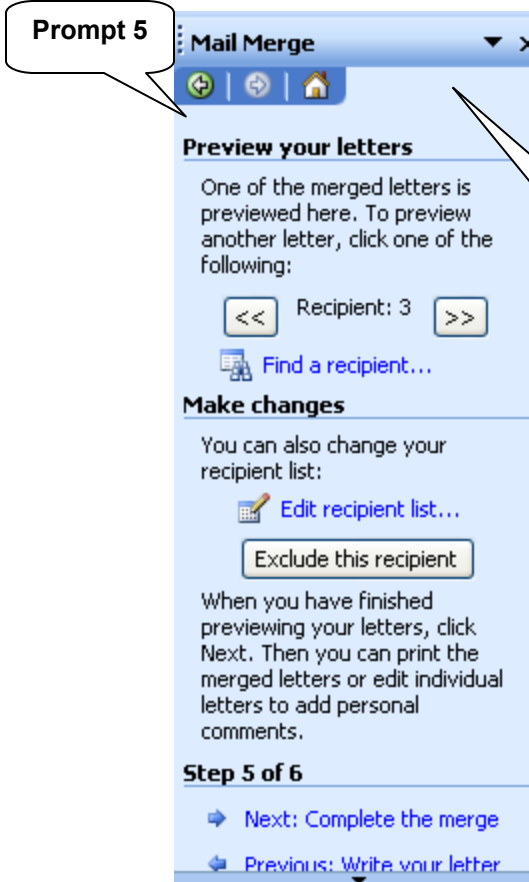
- Address block...
- Greeting line...
- Electronic postage...
- Postal bar code...
- More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

Step 4 of 6

- Next: Preview your letters
- Previous: Select recipients

Creating and using a Mail Merge (Export) File



Prompt 5

Prompt 6

9) This prompt allows you preview letters, and make last minute changes to the recipients.

10) Click *Print* or *Edit* to see the merge results before it is printed (recommended)

By selecting Edit, you can then view, edit and save the document prior to printing. This is the best way to insure that you have the results that you wish; otherwise they will go directly to the printer.

NOTE: If you edit a value from the Edit list it WILL NOT change the values in ContactEase. Therefore, if you spot any corrections you MUST go back to ContactEase and make the same correction in the database.

END OF HINT!