

# USING MAIL-MERGE

Again we are not going to talk about it, we are just going to do it. We'll repeat the exercises in the previous module, but this time generating personalised E-mails and Letters.

## Exercise – Using FIND to select your records

Click the Mail-Merge Button in the GEM Toolbar to open the **FIND** Form.

Click on the **People** Tab and enter Employer as 'Repton Steel'. This will display all of Repton Steel's Staff in the **Current Selection**.

It will also display the **Accumulated Selections** and **Exceptions** Tab.

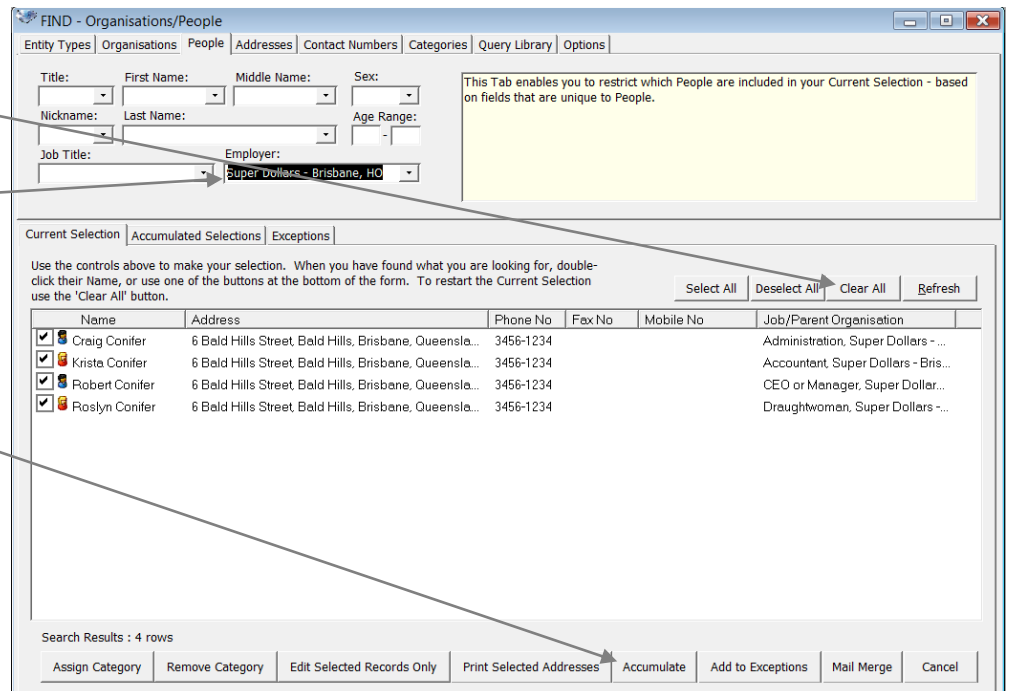
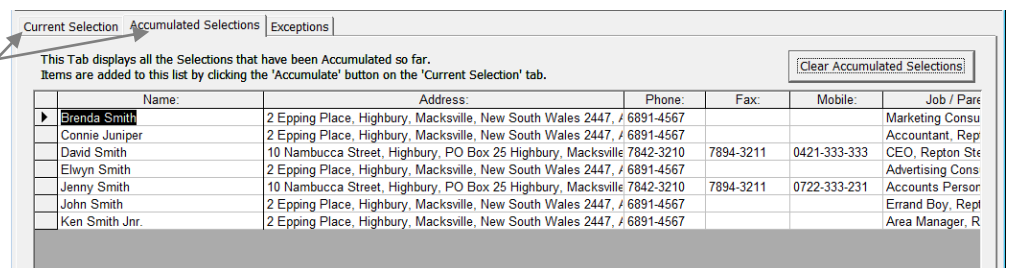
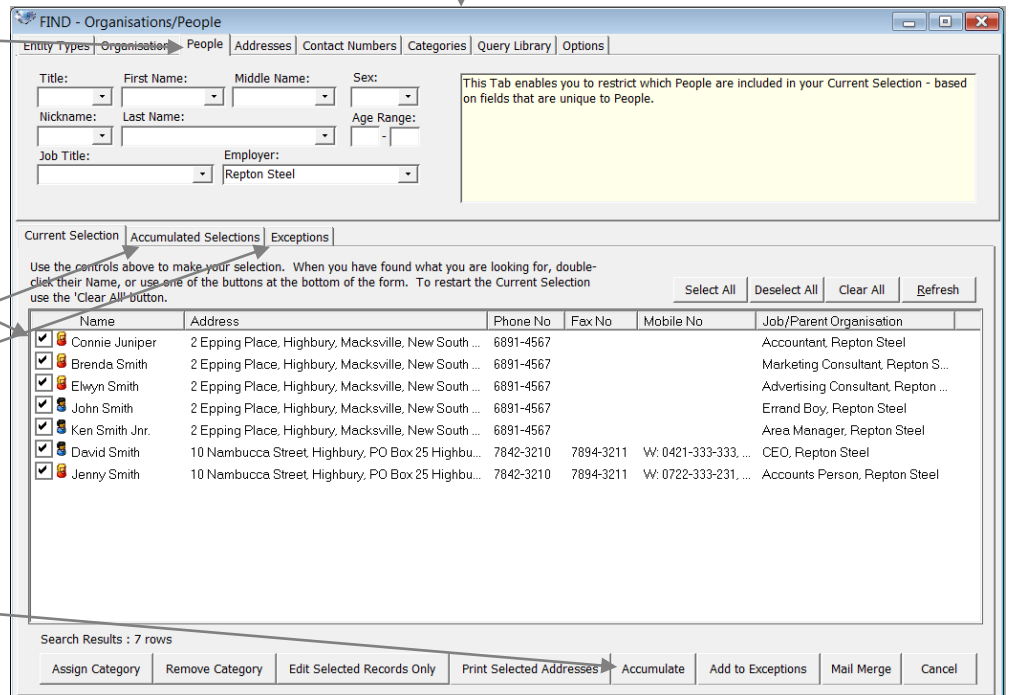
Note there are only two home addresses involved.

Click the **Accumulate** Button. This will move the contents of the 'Current Selection' into the **Accumulated Selections** Tab.

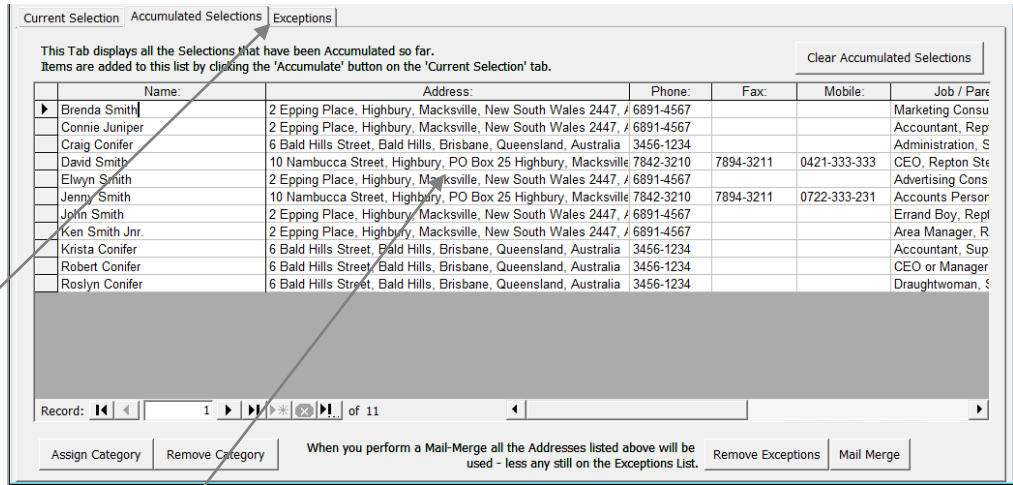
Click the **Current Selection** Tab, which will now be empty.

Click the **Clear All** Button to clear the previous filter controls and then select **Employer** 'Super Dollars – Brisbane, HQ'.

Once again click the **Accumulate** Button. This will add the 'Current Selection' to the 'Accumulated Selections' Tab.

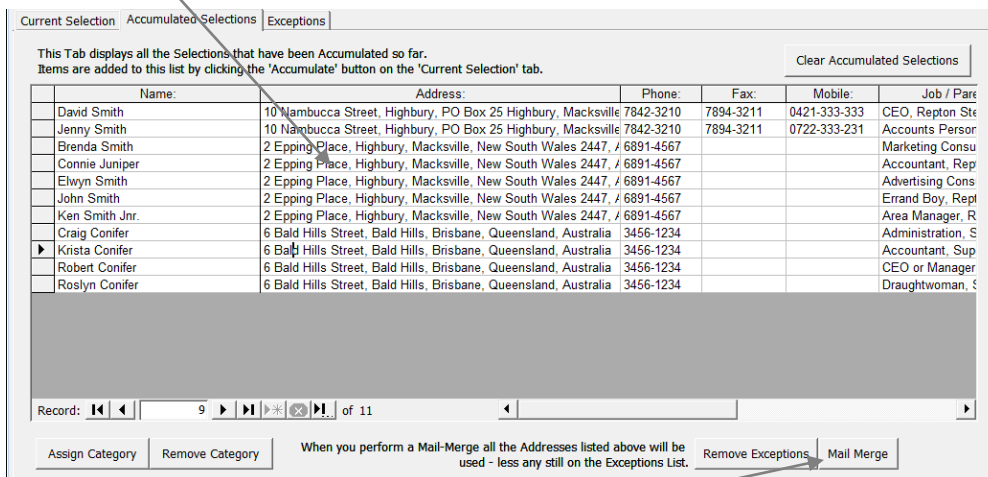
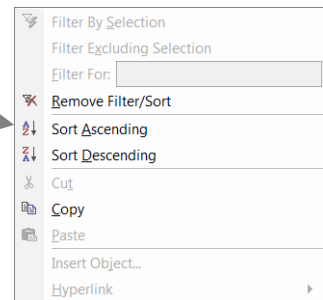


You can make as many 'Current Selections' as you like, like this and accumulate them into a single list. If someone is in multiple 'Current Selections', they will only appear in the final list once.



You can also add to an **Exceptions** List in the same way. Before you use your list, anything left in your 'Current Selection' will automatically be added in and anything in 'Exceptions' will be removed.

Note we now have eleven People selected in the list at three home addresses - to prove it, right-click in the **Address** Column and click **Sort Ascending**. This will display:



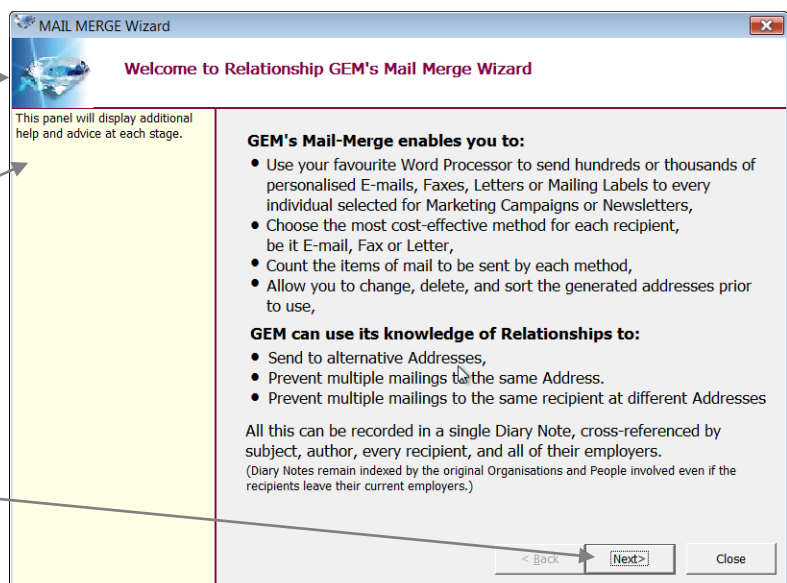
**Exercise – Using Mail-Merge to SEND E-mails, Faxes and Letters**

Now click **Mail-Merge** to start the **MAIL-MERGE Wizard**.

The first page of the Wizard tells you what it does. So read it, at least the first few times you run it.

The **Information Panel** on the left will give you more information as you go along. Just point at any control and it will oblige.

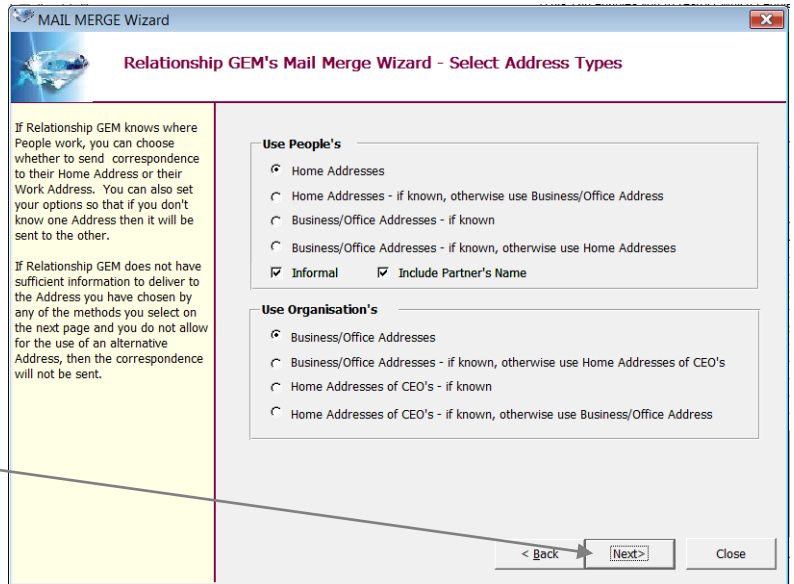
When ready, click **Next>**.



The second page of the Wizard enables you to select the sort of Address you want to use for everyone selected.

If you don't understand the options, point at each Panel in turn and the information panel will explain. For more information try **F1** for context-sensitive HELP.

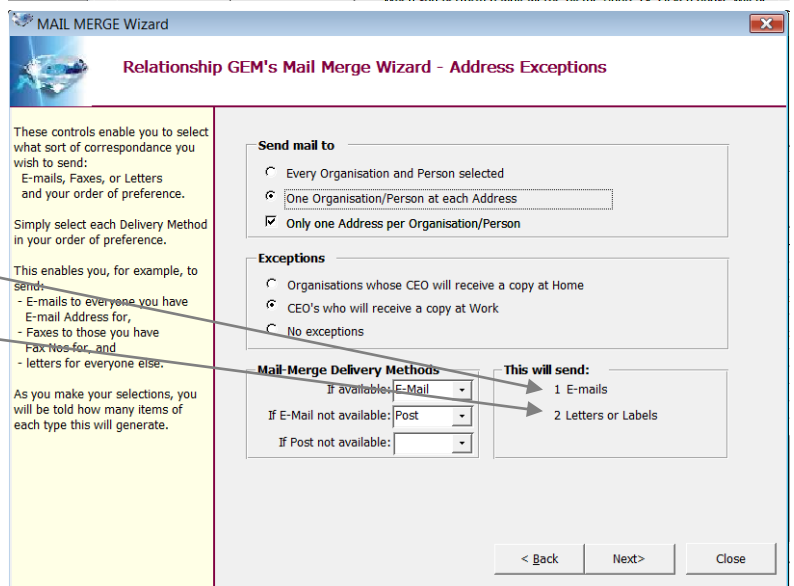
The default options are as shown. Leave them alone and press **Next>**.



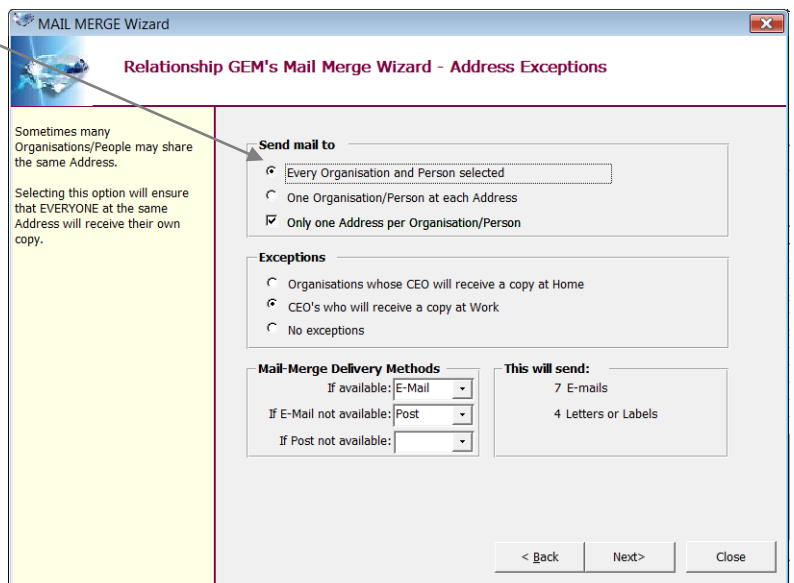
The third Page of the Wizard enables you to control even further which Addresses you wish to send to and chose **Delivery Methods**.

If you choose the options shown, the default, it will only send one **E-mail** and two **Letters or labels**.

How come, when there are eleven People involved? Well, remember they all live at only three Addresses and presumably we only have a valid email address for the 'Principal Contact' at one Address.

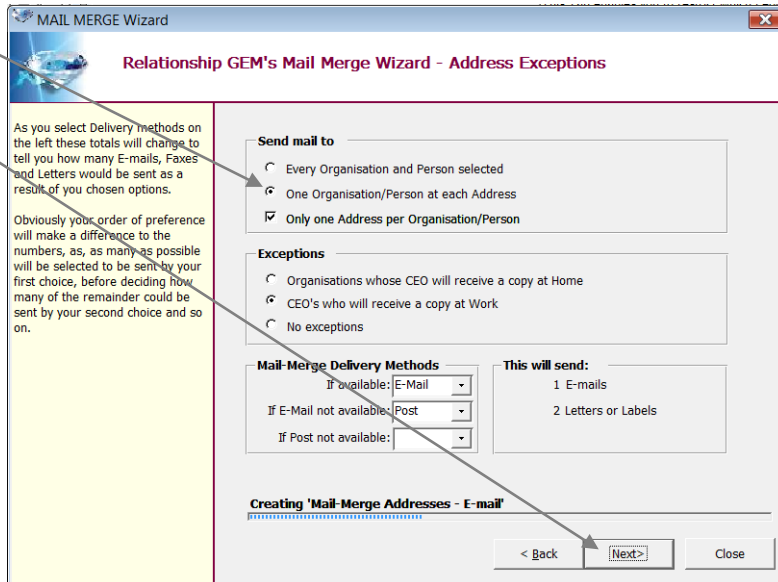


Now click **Every Organisation and Person Selected**. As you can see, this would send seven emails and four letters or faxes.



Now re-select **One Organisation/Person at each Address** because we want to see who was selected. Then click **Next>**.

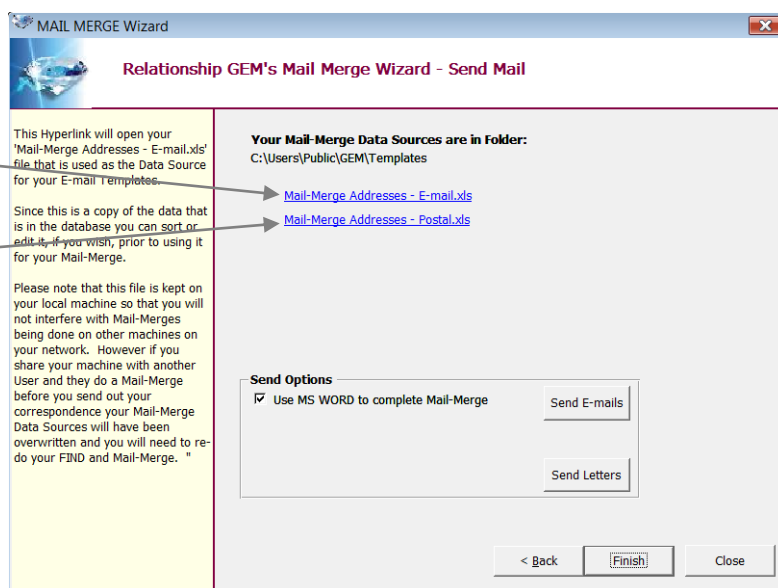
This will create two mail-merge Data Sources in separate Excel Spreadsheets and display the next page of the Wizard.



This Page of the Wizard tells you where it wrote your Data Sources.

Double-click **Mail-Merge Addresses – E-mail.xls** to open the spreadsheet.

Then open **Mail-merge Addresses – Postal.xls** in the same way.



Both spreadsheets are shown below:

F_RecordID	Addresssee	Addresssee Formal	Company	E-mail Address	Fax Number	Physical Address
20545	David & Jenny	David & Jenny Smith		David.Smith@bigpond.com.au	[Fax: +61(02) 7894-3211]	10 Nambucca Street,Highbury,Macksville,New South Wales 24

F_RecordID	Addresssee	Addresssee Formal	Company	E-mail Address	Fax Number	Physical Address
20544	Ken & Elwyn	Ken & Elwyn Smith				2 Epping Place,Highbury,Macksville,New South Wales 2447,Australia
20549	Robert & Roslyn	Robert & Roslyn Conifer				6 Bald Hills Street,Bald Hills,Brisbane,Queensland,Australia

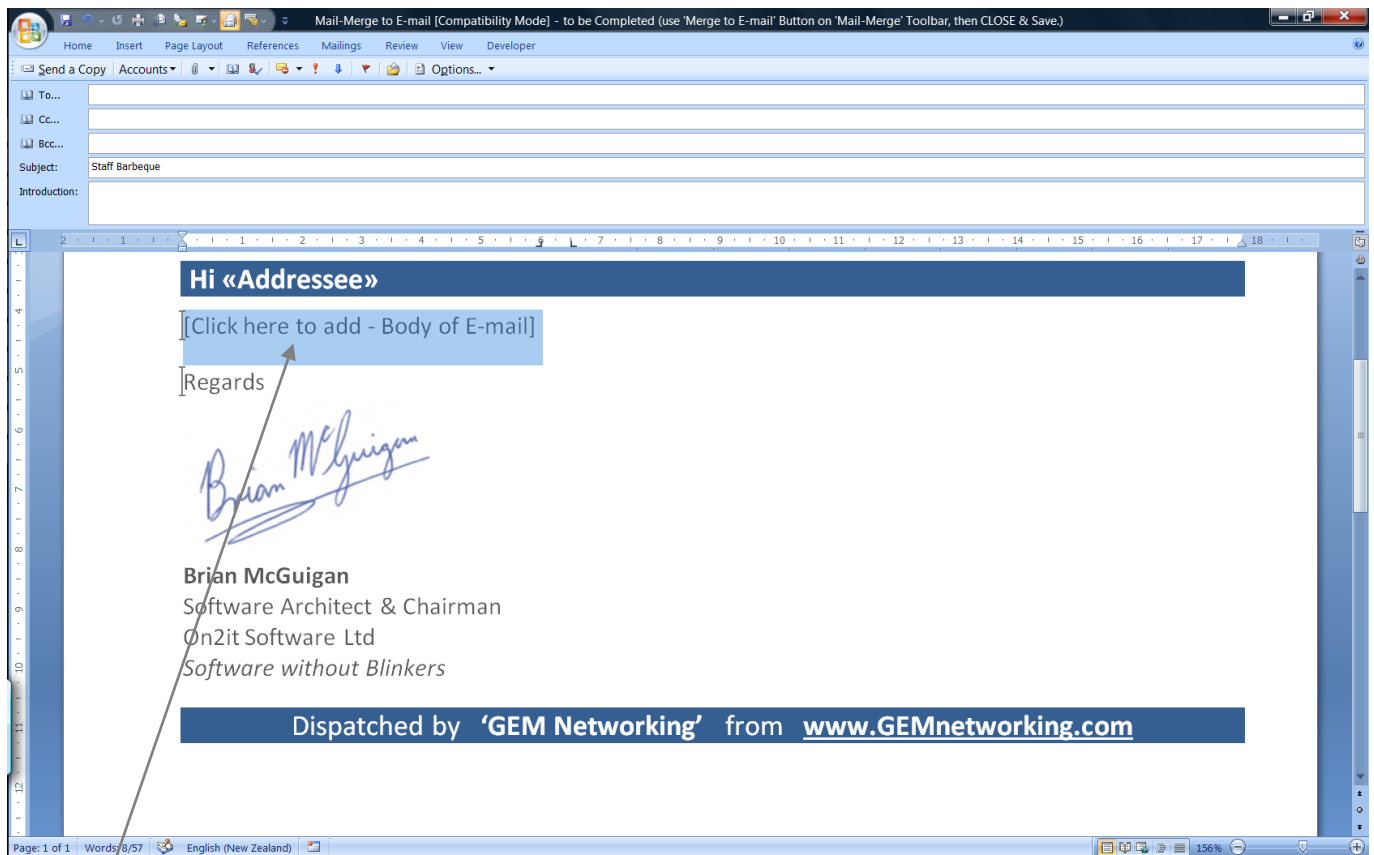
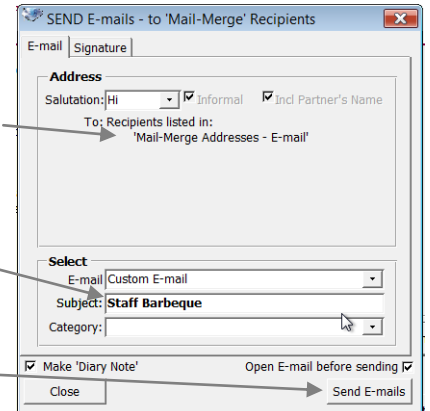
As you can see the system has generated one piece of correspondence for each Address. It only has a home E-mail Address for David Smith. So he is in the E-mail data source. The others are in the Postal data source. GEM has also automatically included everyone's Partner's Name as requested.

Then click the **Send E-mails** Buttons. This will open the **SEND – Email** Form, to enable you to choose which template you want to send. But this time it is addressed to **Recipients Listed in: 'Mail-Merge Addresses – E-mail'**.

We are going to leave it set to 'Custom E-mail' and specify **Subject** as 'Staff Barbeque'.

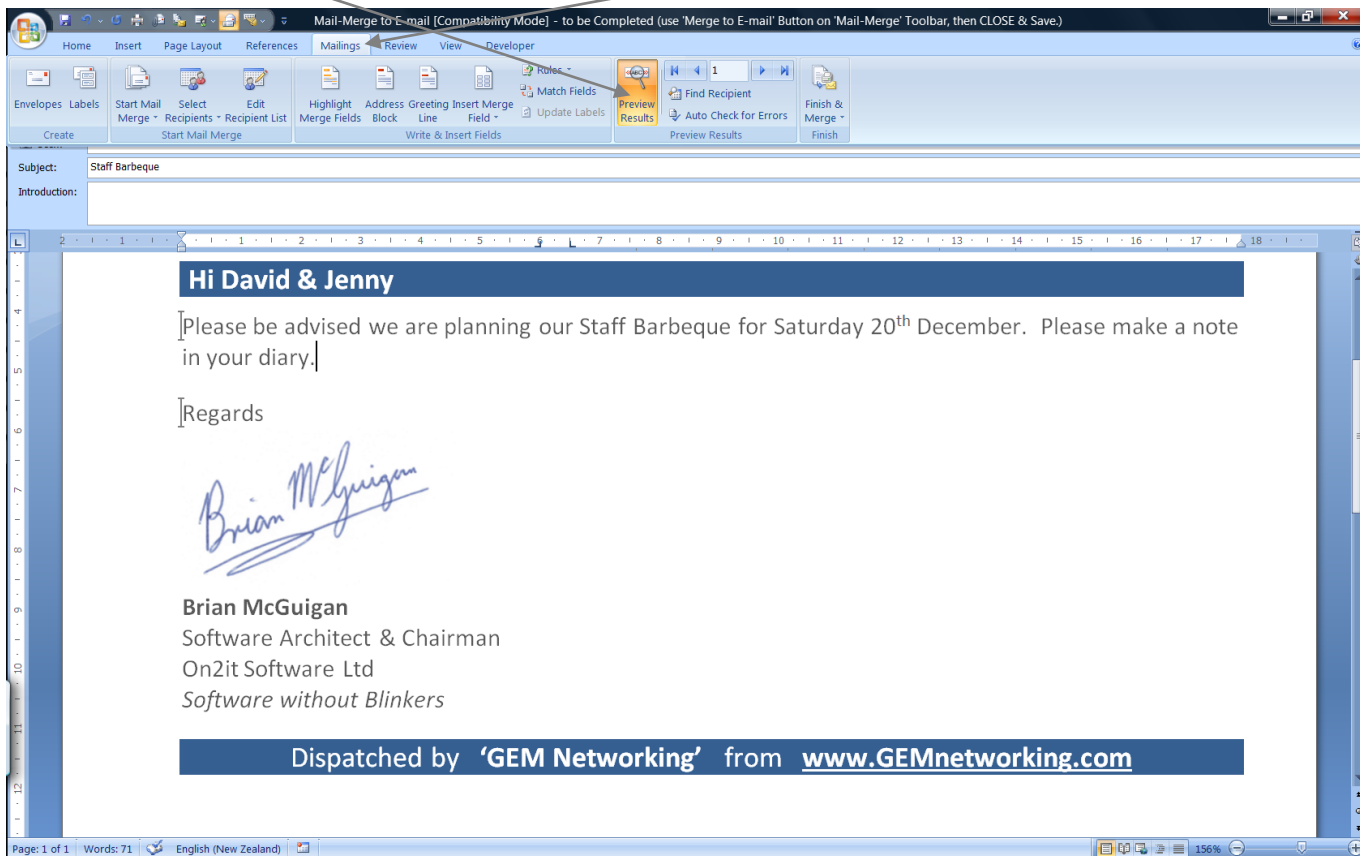
Then click **Send E-mails**.

This will open whatever WORD Template you have defined as your 'Custom E-mail' Template in **Setup, WORD Templates**. Sign it for you and wait for you to enter the body of the E-mail.

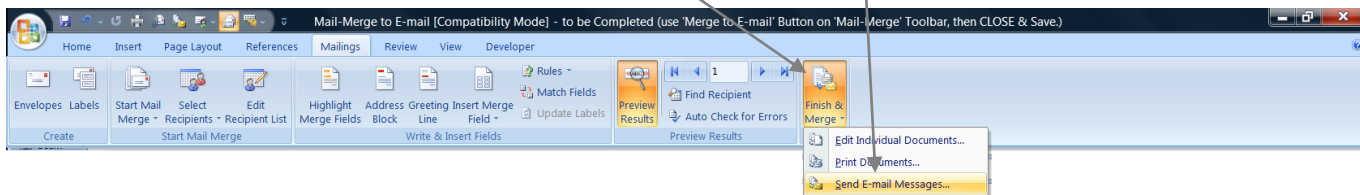


Click **here** and type: 'Please be advised we are planning our Staff Barbeque for Saturday 20<sup>th</sup> December. Please make a note in your diary.'

To preview the mail-merge in WORD 2007, you will need to click on the **Mailings** Tab of the Ribbon. Then click **Preview Results**.

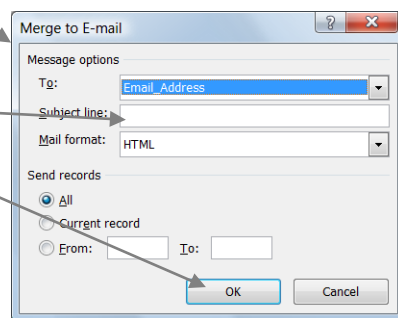
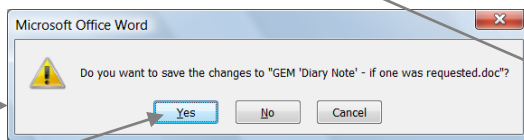


To complete the Mail-Merge, click **Finish & Merge**, then **Send E-mail Messages**.



For some bizarre reason WORD 2007 then displays the **Merge to E-mail** Dialog Box and insists you re-enter the Subject. (This was NOT needed in earlier versions of Word.) So enter **Subject Line** as 'Staff Barbeque' and click **OK**.

When the mail-merge has finished click **Close**. WORD will then ask:

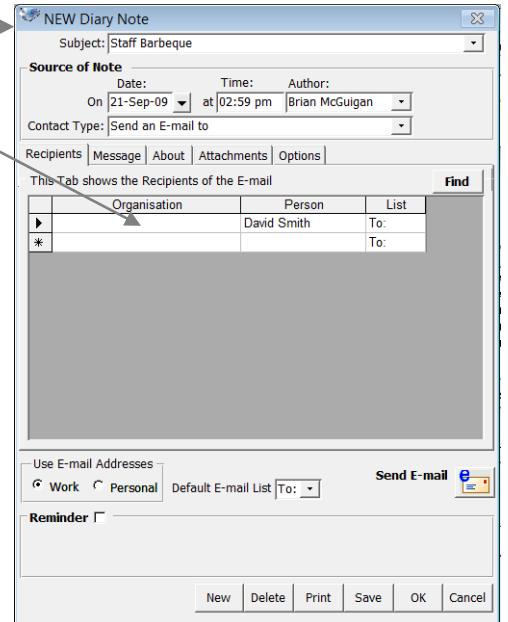
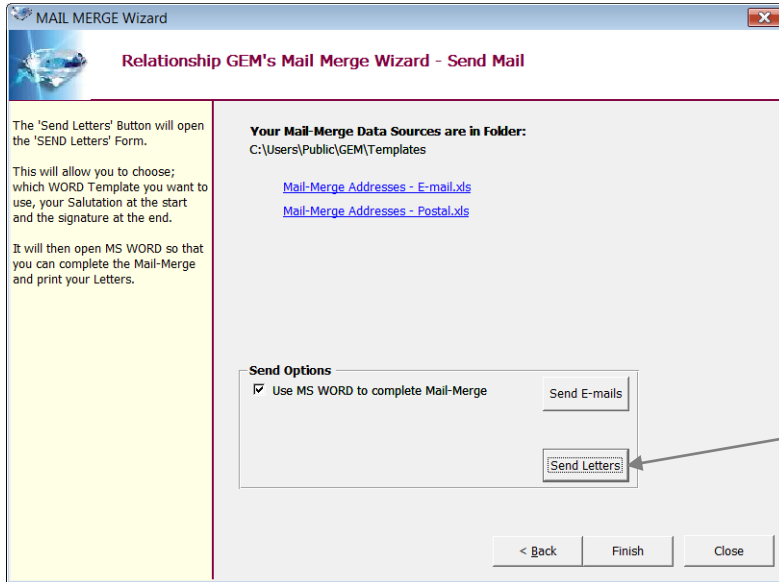


Frankly it does not matter whether you answer Yes or No to this, as GEM will remember whether you said you wanted to make a Diary Note and act accordingly anyway. So click **Yes** anyway.

This will return you to GEM, which will create a **NEW Diary-Note** for you, record your message and list all the **Recipients**.

Because this E-mail was sent to David Smith personally not David Smith at Repton Steel, Repton Steel is not listed.

Now return to the Mail-Merge Wizard. It will still be open:



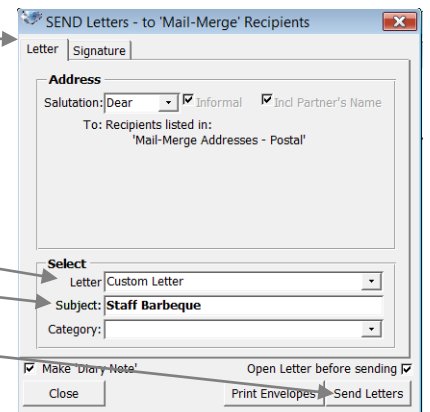
Click **Send Letters** Button.

This opens the **Send Letters** Form opens, which can be used to select a Template to send out a standard letter containing boiler-plate text.

Leave **Letter** set to 'Custom Letter'.

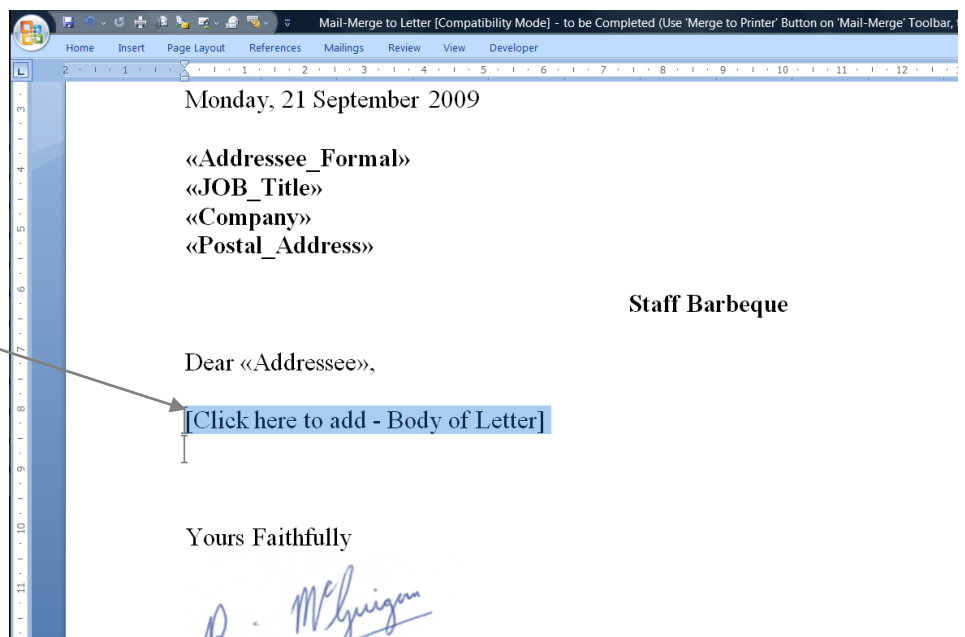
Enter **Subject** as 'Staff Barbeque'.

Click **Send Letters** Button.



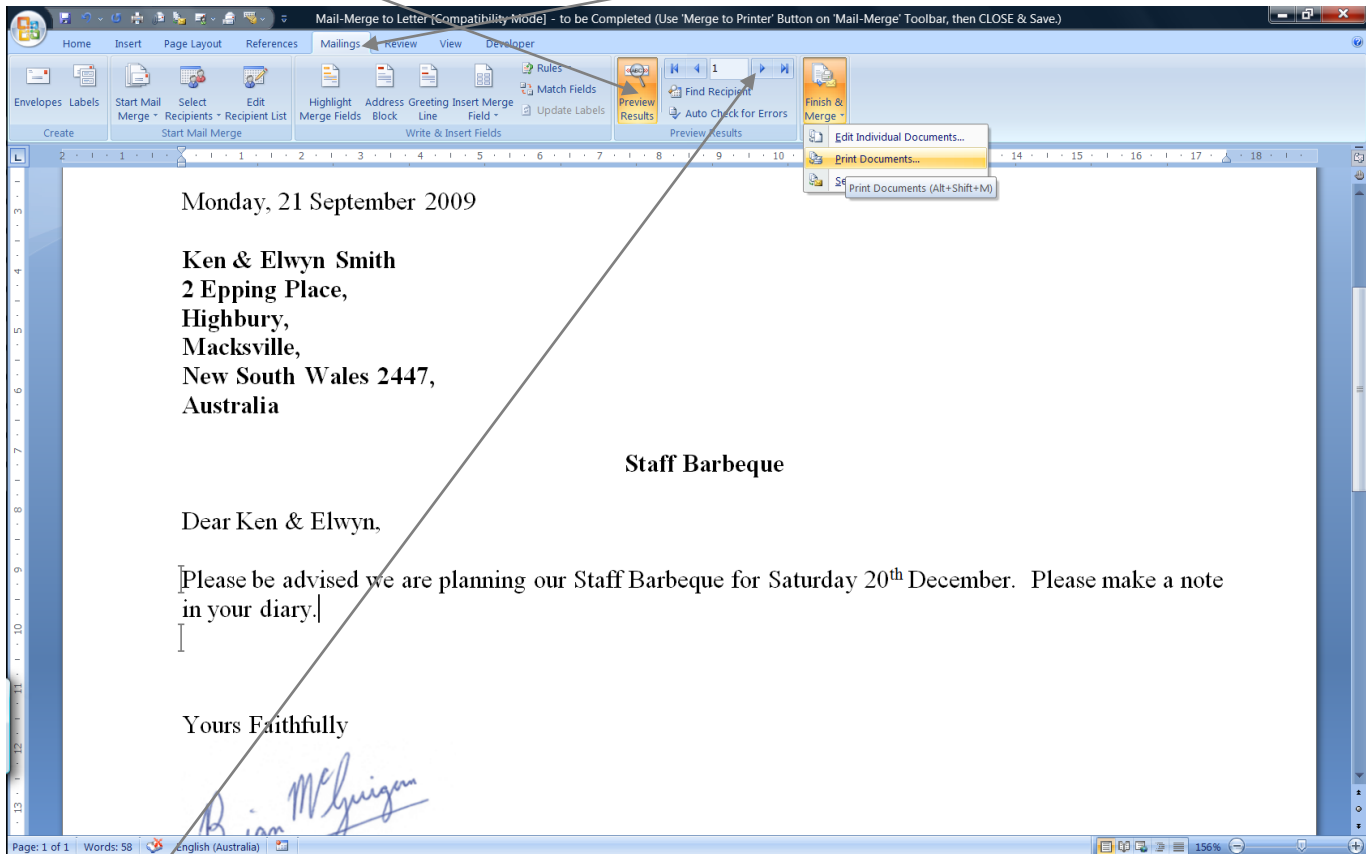
As before, this will open whatever WORD Template you have defined as your 'Custom Letter' Template in **Setup, WORD Templates**. Sign it for you and wait for you to enter the body of the Letter.

Again click **here** and type: 'Please be advised we are planning our Staff Barbeque for Saturday 20<sup>th</sup> December. Please make a note in your diary.'

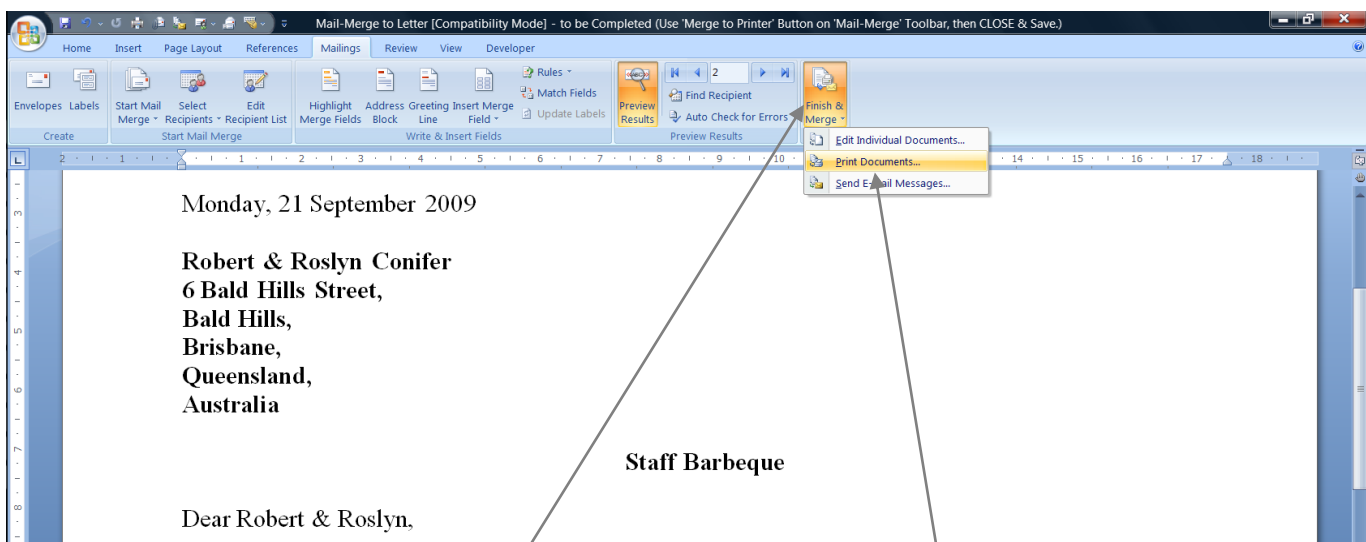


Staff Barbeque

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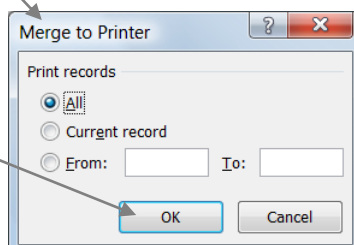
Click [here](#) to see the next letter.



To finish the Mail-Merge click **Finish & Merge** and then, this time, **Print Documents**.

WORD will display a **Merge to Printer** Dialog Box.

Just click **OK**.



When your Letters have finished printing, close the document as normal.

As before GEM will create another **NEW Diary Note** for you.

If you want to set a Reminder, click **here**.

When you've finished, click **OK** to close the form.

NEW Diary Note

Subject: Staff Barbeque

Source of Note

Date: 21-Sep-09 Time: 04:14 pm Author: Brian McGuigan

Contact Type: Send a Letter to

Recipients | Message | About | Documents | Options

This Tab shows the Recipients of the Letter Find

	Organisation	Person
▶		Ken Smith Jr.
*		Robert Conifer

Send Letter to a selected recipient. (You can send to several recipients by selecting each one in turn, or by using Mail-Merge.)

Reminder

Set Reminder for: Brian McGuigan

On Date: Monday, 28 September 2009 at: 9:00 a.m.

New Delete Print Save OK Cancel

Click **Close** Button to close the Mail-Merge Wizard.

Then close the FIND Form.