# 4H4Me Announcement Letter

An announcement letter introducing 4H4Me can be created using 4HPlus! SQL mail merge files and Word's mail merge. This letter includes user IDs and passwords needed for members and leaders to log on to the 4H4Me system.

## **Create the Mail Merge File**

The mail merge file is created in the members' and leaders' SQL. Complete these steps for the members and then for the leaders.

- 1. Open the 4HPlus! program.
- 2. Click Go to > Members > SQL.

Note: Click Go to > Leaders > SQL when creating the leader file.

 At the SQL screen, click Request > Mail Merge. The Selection Criteria screen displays. See Figure 1.

| Request                   |                        |                          |                      |                     |                     |
|---------------------------|------------------------|--------------------------|----------------------|---------------------|---------------------|
| Build Mail Merge File: Me | embers with "Id" = "*" |                          |                      |                     |                     |
|                           |                        |                          |                      |                     |                     |
| 12                        |                        |                          |                      |                     |                     |
| With Field                | h Grand March 199      |                          |                      |                     |                     |
| 🔽 Id                      | 🔲 Gender               | Parent / Guardian        | Local 6              | State 9             |                     |
| Last                      | Race                   | Active                   | Local 7              | State 10            |                     |
| First                     | E Residence            | Leadership               | Local 8              | Class               |                     |
| Г M.L                     | Grade                  | Parenting                | Local 9              | Ethnicity           |                     |
| Street                    | School Name            | Other                    | Local 10             | ☐ White             |                     |
| City                      | 4H Years               | F Primary Club           | Medical Records      | Black or            |                     |
| State                     | Current Year           | User Id                  | State 2              | Am Indian or        |                     |
| T Zin                     | Med Form               | E Password               | E State 3            | Asian               |                     |
| E Phone                   | E Becord Book          | E Local 1                | State 4              | Hawajian or         |                     |
| Alt Phone                 | Dues Paid              | E Local 2                | State 5              | Email Newletters    |                     |
| SSN .                     | Youth Volunteer Tv     | E Local 3                | State 6              | Linits/Clubs        |                     |
| DOB [mm/dd/uu]            | E Email Address        | E Local 4                | State 7              | E Prits / A chympts |                     |
|                           | Events Attended        | E Local 5                | State 8              |                     |                     |
| 1 rigo                    |                        | 1 200010                 | ,                    |                     |                     |
| Parenthesize              | Operator               |                          | Connec               | tor                 | Enter Target String |
|                           | s in 🤆 (=) Equa        | l to 🛛 🔘 (<=) Less tha   | n or Equal to C And  |                     |                     |
| Add C Add                 | C (k) Less             | than C (>=) Greater t    | han or Equal to C Or |                     | j"                  |
| Delete ( Delet            | C (>) Great            | er than C (<>) Not equa  | al to C Proc         | cess                |                     |
| Delete [ Delet            |                        | or man ice (vi) not odde |                      |                     |                     |

### Figure 1. Selection for 4H4Me Letter

- 4. Check the **ID** field.
- 5. Click the **Equal to** radio button in the *Operator* section.
- 6. Type an asterisk \* in the *Enter Target String* field.
- 7. Press Enter.
- 8. Click the **Process** radio button.
- 9. Select the fields to include in the mail merge file. See Figure 2 on page 1.

| □Request<br>Build Mail Merge File: Members with "Id" = "*" |   |                  |                |                              |  |
|--|---|------------------|----------------|------------------------------|--|
| Matches  |   |                  |                |                              |  |
| 310/310  |   |                  |                |                              |  |
| Select print fields in prin                                | it order                                    | 6 B              |                |                              |  |
| 🗖 Id   | 🗖 SSN                                       | 📕 Med Form       | C Other        | 🔲 Ethnicity                  |  |
| 2 🔽 Last   | 🗖 DOB                                       | 🥅 Record Book    | 🧮 Primary Club | 🔽 White                      |  |
| 1 🔽 First  | 🥅 Age                                       | 🥅 Dues Paid      | 7 🔽 Userld     | 🥅 Black or                   |  |
| 🗖 M.I.   | 🥅 Gender                                    | 🦳 Youth Volunt   | 8 🔽 Password   | 🥅 Am Indian or               |  |
| 3 🔽 Street   | 🥅 Race                                      | 🥅 Email Addres   | 🔽 Local 1      | 🥅 Asian                      |  |
| 4 🔽 City   | 🥅 Residence                                 | 🔲 Events Atten   | 🔽 Local 2      | 🥅 Hawaiian or                |  |
| 5 🔽 State  | 🦵 Grade                                     | 🥅 Parent / Gua   | 🔽 Local 3      |                              |  |
| 6 🔽 Zip  | 🦳 School Namε                               | C Active         | 🔽 Local 4      |                              |  |
| Phone  | 🔲 4H Years                                  | Leadership       | 🔽 Local 5      |                              |  |
| Alt Phone  | Current Year                                | Parenting        | Class          |                              |  |
| 🔽 Incluc   | de Club and Project Id's if selected for ma | il-mergeClear fi | eld selection  | Continue (select sort order) |  |

Figure 2. Mail Merge Fields

- a. Check the First and Last name boxes.
- b. Check the Street, City, State, and Zip boxes.
- c. Check the User ID and Password boxes.
- 10. Click the **Continue (select sort order)** button. The *Sort Method* screen displays.
- 11. Check the **Last** and **First** name boxes. See Figure 3.

| Request<br>Build Mail Merge File: Memb           | pers with ''Id'' = ''*''   |                                  |   |
|--|----------------------------|----------------------------------|---|
| Matches<br>310/310                               |                            |                                  |   |
| Select Sort Order<br>Id<br>1 V Last<br>2 V First | ☐ Zip<br>☐ Age<br>☐ Gender | ☐ Race<br>☐ Residence<br>☐ Grade | ☐ 4H Years<br>☐ Extra 1<br>☐ Primary Club |
| Select Printer                                   |                            |                                  |   |
| Clear sort order selection                       |                            |                                  |   |
| Process My Request!                              |                            |                                  |   |
| Open Word Processor                              |                            |                                  |   |

#### Figure 3. Sort Order

12. Click the **Process My Request!** button.

- An information message displays showing the location of the mail merge file.
   Make a note of the file's location. Click **OK**.
- 14. Click **Exit**.
- 15. Exit the program when both files are created.

**Warning**: Rename the 4HPMail.dat file for the members <u>before</u> creating the leaders' file. Otherwise, it will be overwritten when the leaders' file is created. For example, rename it to 4Hmembers.txt. After the leaders' file is created, rename it to 4Hleaders.txt.

# **Create the Announcement Letter**

The announcement letter is created in Word and uses the mail merge feature to personalize the letter with the user ID and password.

- 1. Open Word, and start a new document if needed.
- Click Tools > Letters and Mailings > Mail Merge. The mail merge wizard displays in the task pane.
- 3. Select the **Letters** radio button.
- 4. Click the Next: Starting document link.
- 5. Select the **Use the current document** radio button.
- 6. Click the **Next: Select recipients** link.
- 7. Select the **Use an existing list** radio button.
- 8. Click the **Browse** link in the *Use an existing list* section.
- 9. Navigate to the C:\CKV\4HPlus\WY\Files folder.
- 10. Change the *Files of type* to **All files (\*.\*)**.
- 11. Locate the 4Hmembers.txt file.
- 12. Click **Open**.
- 13. Click the **Next: Write your letter** link.

### Write the Letter

- 1. Click Insert > Date and Time.
- 2. Highlight the **desired date format**.
- 3. Click OK.

- 4. Press Enter twice.
- 5. Click the **Address Block** link in the task pane.
- 6. Click the **Match Fields** button.
- 7. Click the Address1 down arrow.
- 8. Select Street. See Figure 4.

| Match Fields  | X                 |  |  |  |
|---|-------------------|--|--|--|
| Mail Merge has special features for easily working with addresses. Use the drop-down list to select the proper database field for each address field component. |                   |  |  |  |
| Required information  | ~                 |  |  |  |
| Last Name   | Last 🗾            |  |  |  |
| First Name  | First             |  |  |  |
| Courtesy Title  | (not matched) 💽   |  |  |  |
| Company   | (not matched) 💽   |  |  |  |
| Address 1   | Street 🗾          |  |  |  |
| City  | City              |  |  |  |
| State   | State             |  |  |  |
| Postal Code   | Zip               |  |  |  |
| Spouse First Name   | (not matched) 💽   |  |  |  |
| Optional information  |                   |  |  |  |
| Middle Name   | (not matched) 🗾 🚃 |  |  |  |
| Suffix  | (pot matched)     |  |  |  |
| Use the drop-down lists to choose the field from your database that corresponds to the<br>address information Mail Merge expects (listed on the left.)          |                   |  |  |  |
|   | OK Cancel         |  |  |  |

#### Figure 4. Match Fields

- 9. Click OK.
- 10. Highlight the **desired recipient's format**. See Figure 5 on page 5.
- 11. Uncheck the **Insert company name** box.
- 12. Check the **Never include the country/region in the address** radio button.
- 13. Click **OK**.
- 14. Press Enter twice.
- 15. Click the **Greeting line** link.
- 16. Select the parameters for the greeting line. See Figure 6 on page 5.

#### 4H4Me Announcement Letter

| Insert Address Block   | × |
|--|---|
| Specify address elements           Insert recipient's name in this format: |   |
| Josh Q. Randall Jr.<br>Joshua<br>Joshua Randall Jr.                        |   |
| Joshua Q. Randall Jr.<br>Mr. Josh Randall Jr.<br>Mr. Josh Q. Randall Jr.   | ~ |
| Insert company name  |   |
| ✓ Insert postal <u>a</u> ddress:   |   |
| Never include the country/region in the address                            |   |
| <ul> <li>Always include the country/region in the address</li> </ul>       |   |
| Only include the country/region if different than:                         |   |
| United States  | * |
| Format address according to the destination country/region                 |   |
| Preview  |   |
| Joshua Randall Jr.   |   |
| Kitty Hawk, NC 27700   |   |
|  |   |
|  |   |
|  |   |
| Match Fields OK Cancel   |   |

Figure 5. Address Block

| Greeting Line                              |      |
|--|------|
| Greeting line format:                      |      |
| Dear 🕑 Joshua 👻 ,                          | *    |
| Greeting line for invalid recipient names: |      |
| To Whom It May Concern:                    |      |
| Preview                                    |      |
| Dear Joshua,                               |      |
| Match Fields OK Car                        | ncel |

### Figure 6. Greeting Line

- 17. Type the rest of the letter.
- 18. Include the user ID and password.

- a. Click the **More items** link.
- b. Highlight user ID.
- c. Click Insert.
- d. Click Close.
- e. Click the More items link.
- f. Highlight **password**.
- g. Click Insert.
- h. Click Close.
- 19. Click the **Next: Preview your letters** link.
- 20. Review the letters as needed.
- 21. Click the **Next: Complete the merge** link.
- 22. Click **Print**.

### Use the Leaders Mail Merge File

Use the same letter for the leaders to complete the mail merge. Click the **Previous** links until the *Select recipients* displays. Click the **Select a different list** link. Select the leaders file. Complete the rest of the mail merge.