

# Mail Merge with 4HPlus! and Microsoft Word

A mail merge file can be created in the 4HPlus! program and used to send letters to the members and/or leaders. This is done through the mail merge feature in Microsoft Word. The examples are using Microsoft Office XP or Office 2003, and Windows XP.

Mail merge is also used to create e-mail messages, envelopes, labels, and directories. Name badges can be created by using labels and selecting the Avery 5095 Name badge label option.

### **Create the Mail Merge File**

Use the SQL feature in 4HPlus! to create a mail merge file to send letters to members and/or leaders. In this example, a letter is being sent to all members welcoming them to the new 4-H year. The letter shows the member's personal information and asks them to confirm it is correct. It also includes a request for their e-mail address, if they have one available.

- 1. Open the 4HPlus! program.
- Click Goto > Members > SQL > Request > Mail Merge.
   Note: Use the *current year* field to select the current members.
- 3. Check the Current Year check box on the Build Mail Merge File screen.
- 4. Click the (=) Equal to radio button in the Operator box.
- 5. A box showing a *list of years* displays. Highlight the **current year**.
- 6. Click the **Continue** button.
- 7. A Connector box displays. Click the **Process** radio button.

**Note**: The number of matches for the query displays. Make sure data is available, and the number of matches is **not** zero.

8. Next, the Select print fields in print order screen displays. See Figure 1.

Wyoming Washakie St	ructured Query Languag	je Data Dai	Data Set 2002/2002	
<u>Exit R</u> equest Queue <u>S</u> etup	Email			
Request Build Mail Merge File: Member	Hint: The field selec completed. At this ti generator to save in the same fields you u s with "Current Year" = "02"	tion, target matching, etc. for you me you must select the fields that your mail-merge file. You do not ised to control your record select	r Mail-merge request is now you wish the SQL mail-merge have to (but you can) save on. In what order do they get	
Matches 64/242				
Select print fields in print order. Id I I I Last First M.I. J I Street 4 I City 5 I State 6 I Zip 7 I Phone Alt Phone	 8 ▼ DOB Age Gender Race Residence Grade 9 ▼ School Name 4H Years Current Year	MedForm Record Book Medical Form Youth Volunt To Events Atten Parent / Gua Leadership Parenting	Uther Units Projects	
Clear field selection	Continue (select so	rt order)		

#### Figure 1. Select Print Fields

9. Click the **check box** for these fields.

Last	Zip
First	Phone
Street	DOB
City	School Name
State	E-mail Address

- 10. Click the **Continue (select sort order)** button.
- 11. At the *Select Sort Order* screen, check **Last** so it sorts on the last name. The number 1 appears to the left of the field name showing it is the primary sort.
- 12. Check **First** so it performs a secondary sort on the first name. The number 2 displays to the left of the field name.

- 13. Click the **Process My Request!** button.
- An information window displays with the message, "Task Completed! Merge Fields are in file C:\CKV\4HPlus\Wy\Files\4HPMail.dat." Make a note of the file location. Click **OK**.

### **SQL Request**

Once the SQL request is completed, it can be saved to be used again in the future.

- 1. Click **Queue > Add**. The SQL request criterion displays.
- 2. Type Current Members in the Name Request field.
- 3. Press the **tab** key.
- 4. Click the **Add Now** button.
- 5. Click the **Return** button.

### **Mail Merge Wizard**

The member information is used in a mail merge to send the letter. The data is merged using the Mail Merge Wizard.

- 1. Open the Microsoft Word program.
- 2. Open a new document.

**Note**: The examples are shown in print layout view. Click **View > Print Layout** to change the view, if needed.

- Click Tools > Letters and Mailings > Mail Merge Wizard. The *task pane* with the Mail Merge wizard displays on the right-hand side of the screen. See Figure 2 on page 4.
- 4. Select the *document type* by clicking the **Letters** radio button.
- 5. Click the <u>Next: Starting document</u> link.
- 6. Click the **Use the current document** radio button.
- 7. Click the Next: Select recipients link.
- 8. Click the **Use an existing list** radio button.
- Under the Use an existing list section, click the <u>Browse</u> link. The Select Data Source window displays.

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	Select document type
	What type of document are you working on?
	<ul> <li>Letters</li> </ul>
	C E-mail messages
	Envelopes
	🔘 Labels
	<ul> <li>Directory</li> </ul>
1	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
Page 1 Sec 1 1/1 At Ln Col REC TRK EXT OVR English (U.S	

Figure 2. Mail Merge Wizard

- Navigate to the 4HMail file located in the C:\CKV\4HPlus\WY\Files folder, and open it. The Mail Merge Recipients window displays. See Figure 3 on page 5.
- 11. Click the **Select All** button, and click **OK**.

Note: The path for the 4HMail file displays in the Use an existing list section.

12. Click the <u>Next: Write your letter</u> link.

**Note**: Click the **Show/Hide** ¶ icon so the paragraph and tab marks display while inserting fields in the letter. Displaying the icon makes it easier to place the fields in the letter.

- Click Insert > Date and Time to show the current date. The Date and Time dialog box displays.
- 14. Highlight the desired **date format**.
- 15. Check the **Update automatically** box.
- 16. Click **OK**.
- 17. Press Enter three times to leave space in-between the date and the address block.

Mail	Merge Re	ecipients					20
To so speci butto List o	ort the list, o fic criteria, s ons to add o of recipients	lick the appro such as by cit r remove rec	opriate colun :y, click the a ipients from	nn heading. arrow next t the mail mei	To narrow o the colum ge.	down the recipients displa n heading. Use the check	yed by a boxes or
	▼ Last	▼ First	▼ City	▼ State	▼ Z	Email Address	Ph 🔨
	Aagard	Brian	Worland	WY	8240	-	(307)34
	Ander	Charley	Worland	WY	82401		(307)34
	Ander	Chris	Worland	WY	82401		(307)34
	Ander	Sammy	Worland	WY	82401		(307)34
	Barnes	Kristi	Worland	WY	82401		(307)34
	Bastida	Roman	Worland	WY	82401		(307)34
	Batts	Diana	Ten Sl	WY	82442	whb863@yahoo.com	(307)36
	Bennett	Elizabeth	Worland	WY	82401	speedracer ret@yah	(307)34
	Bush	Myles	Ten Sl	WY	82442		(307)36
	Casdo	Katie	Worland	WY	82401		(307)34
	Christ	Erik	Worland	WY	82401	echris@trib.com	(307)34
	Christ	Sara	Worland	SWA	82401	echrist@trib.com	(307)34
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Figure 3. Mail Merge Recipients

- 18. Click the <u>Address Block</u> link in the *Write your letter* section. The *Address Block* dialog box displays.
- Click the Match Fields button to display how the fields are matched between the 4-H mail merge file and Word mail merge. The *Address 1* field is not available. See Figure 4 on page 6.
- 20. Click the Address 1 field arrow. A list of the fields from the 4-H data displays.
- 21. Highlight **Street** to match it with the *Address 1* field.
- 22. Click **OK**. The *Address Block* dialog box displays.
- 23. Highlight **Joshua Randall Jr.** under the *Insert recipient's name in this format* section.
- 24. Because a company name is not used with 4-H, click the **Insert company name** box to uncheck it.
- 25. Check the radio button for **Never include the country/region in the address** in the *Insert postal address* section.
- 26. Look at the *Preview* field to see if the address is in the desired format. Make changes as needed.

27. Click **OK**. The wording <<AddressBlock>> displays in the letter.

Required information	
Last Name	Last 🗾
First Name	First 🗾
Courtesy Title	(not available) 💽
Company	(not available) 💽
Address 1	(not available) 💽
City	City
State	State
Postal Code	Zip
Spouse First Name	(not available) 📃
Optional information	
Middle Name	(not available) 💽
Suffix	(not available)

#### Figure 4 - Match Fields

- 28. Press **Enter** three times to add blank lines in-between the address block and the salutation.
- 29. Click the Greeting line link. See Figure 5 on page 7.
- 30. Click the **down arrow** next to *Mr. Randall*. Scroll down and select the greeting for **Joshua** or **Josh**.
- 31. Look at the *Preview* field to see if the greeting is in the desired format. Make changes as needed.
- 32. Click **OK**. The wording <<GreetingLine>> displays in the letter.

Greeting Line		? 🛛
Greeting line format: Dear  Joshua Greeting line for invalid recipient names:	•	, 💌
Dear Sir or Madam,		
Dear Joshua,		
Match Fields	ОК	Cancel

#### Figure 5. Greeting Line

33. Type the rest of the letter. See the sample letter in Figure 6.



#### Figure 6. Sample Letter

- 34. Member information is added after the signature block. Take the following steps to add the fields.
- 35. Type **Name:**, and press the **tab** key.

- In the Mail Merge task pane, click the <u>More items</u> link. The *Insert Merge Field* dialog box displays. See Figure 7.
- 37. Click the **Database Fields** radio button.
- 38. Highlight First for the first name, and click the Insert button.
- 39. Click the **Close** button. The field <<First>> displays on the letter.

Insert Merge Field	? 🛛
Insert: C <u>A</u> ddress Fields <u>F</u> ields:	Database Fields
Last	*
Street City State Zip Phone DOB School_Name Email_Address	
Match Fields	Insert Cancel

#### Figure 7 - Insert Merge Field

- 40. Press the **spacebar** to add a space after <<First>>.
- 41. Click the <u>More items</u> link.
- 42. Highlight Last for the last name, and click Insert.
- 43. Click the **Close** button.
- 44. Press the Enter key.
- 45. To insert the address, type the word **Address:**, and press the **tab** key.
- 46. Click the <u>More items</u> link.
- 47. Highlight Street, and click Insert.
- 48. Click the **Close** button.
- 49. Add a space after <<Street>>.
- 50. Click the More items link.

- 51. Highlight City, and click Insert.
- 52. Click the **Close** button.
- 53. Add a space after <<City>>.
- 54. Click the More items link.
- 55. Highlight State, and click Insert.
- 56. Add a space after <<State>>.
- 57. Press the Enter key.
- 58. Click the More items link.
- 59. Highlight **Zip**, and click **Insert**.
- 60. Click the **Close** button.
- 61. Type **Phone Number:** on the next line and press the **tab** key.
- 62. Click the More Items link.
- 63. Highlight Phone, and click Insert.
- 64. Click the **Close** button.
- 65. Press the Enter key.
- 66. Repeat the process for the **birthday**, **school**, and **e-mail address** items. See Figure 8 for the final letter.

**Note**: Align the information by changing the tab setting. Highlight the personal information. Be sure the left tab icon displays on the ruler. Click at 1  $\frac{1}{2}$ " mark on the ruler.



#### Figure 8 - Final Letter

67. Click the <u>Next: Preview your letters</u> link. The letter displays with the information. Review it to be sure everything is correct. Click the arrow buttons to review additional letters.

**Note**: Changes can be made to the letter or to the data. Click the <u>Previous</u>: <u>Write your letter</u> link to make changes to the letter. Click <u>the Previous</u>: <u>Select</u> <u>recipients</u> link and the <u>Edit recipient list</u> link to make changes to the data.

- 68. Click the Next: Complete the merge link. Two options are available.
- 69. Click the Print link to print the letters.
- 70. Click the Edit individual letters link to make changes to individual letters.
- 71. Click File > Save As to save the letters.
- 72. Type the **file name**, and click the **Save** button.

## **Use the Current Members Saved Request**

The current members request can be used again to create another mail merge file. It uses the same criteria as originally created. Create a new request when different criterion is needed.

- 1. Click Goto > Members > SQL > Queue > Display.
- 2. A list of the saved SQL requests displays.
- 3. Highlight the **Current Members** request. The request criterion displays.
- 4. Click the **Process** button to run the request.
- 5. Click **OK** at the information message.
- 6. Click **Exit > Goto > Exit** to close the program.