



Cooperative Extension Service 4HPlus! Computer Tip

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New Thinking

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.
2. 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.

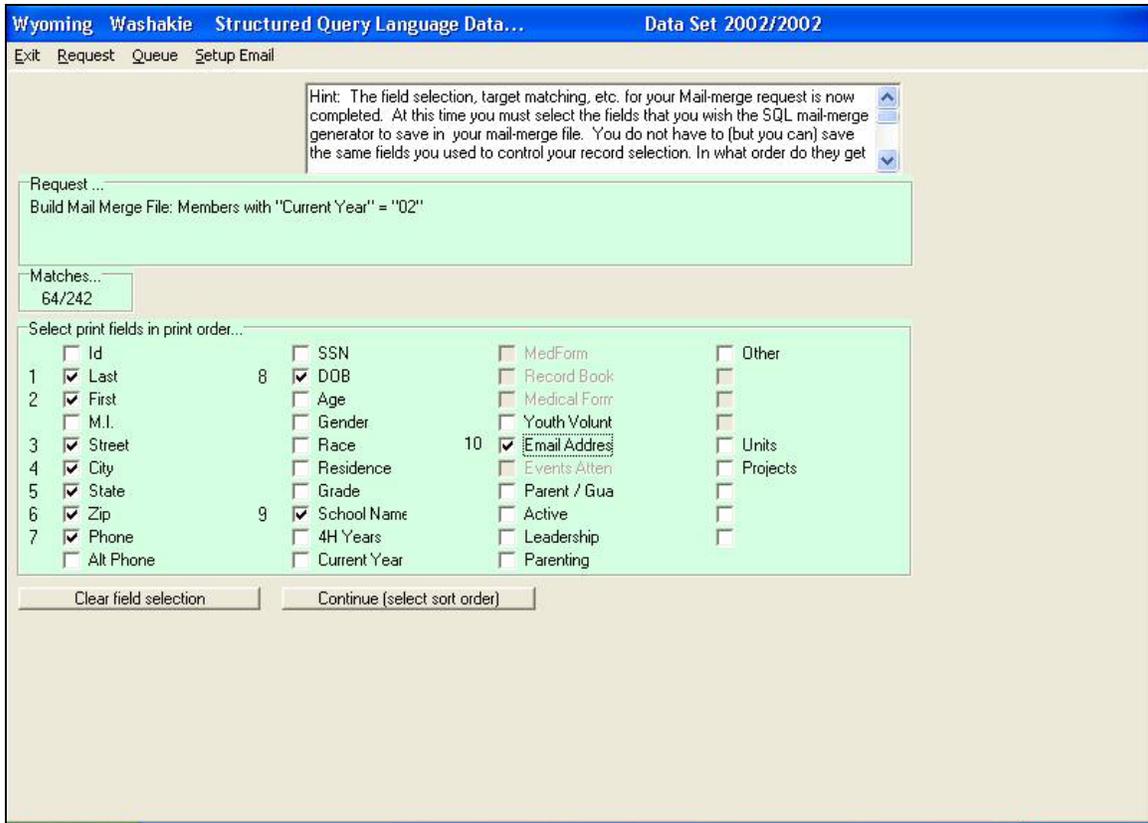


Figure 1. Select Print Fields

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.
14. 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.

3. 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 [Next: Starting document](#) 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.
9. Under the *Use an existing list* section, click the [Browse](#) link. The *Select Data Source* window displays.

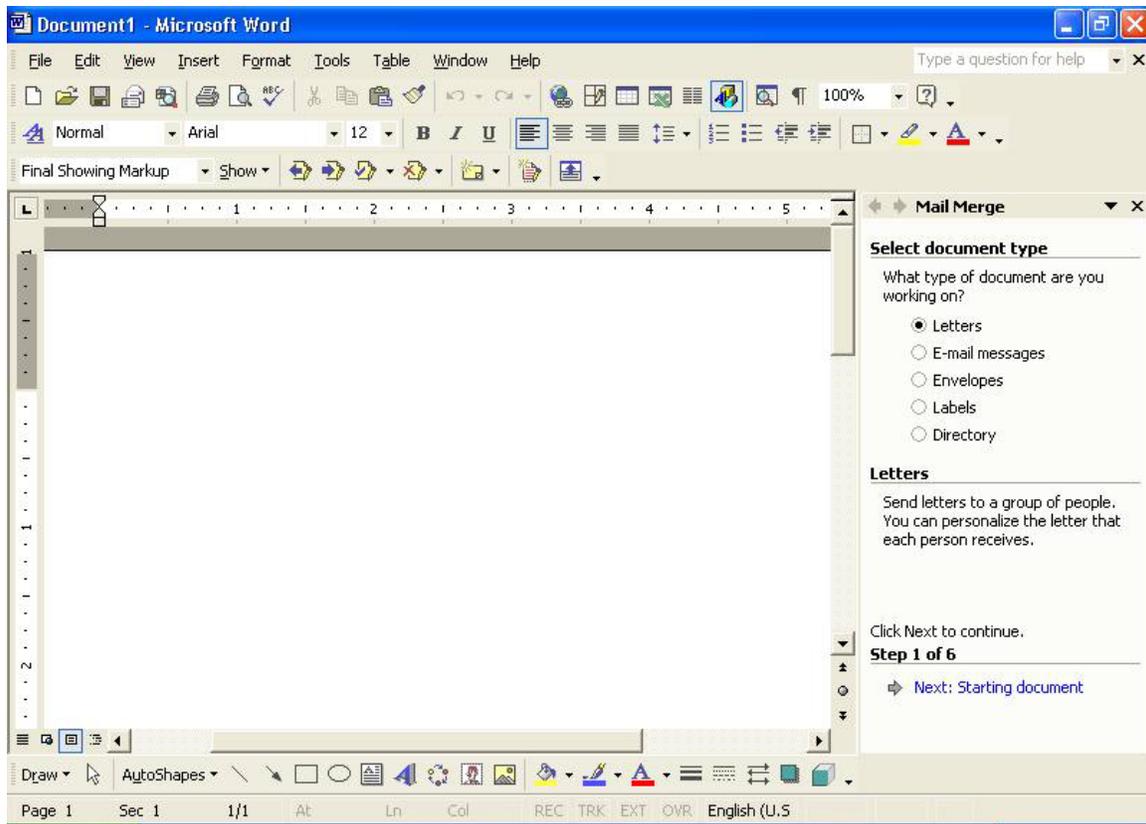


Figure 2. Mail Merge Wizard

10. 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 [Next: Write your letter](#) 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.

13. 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.

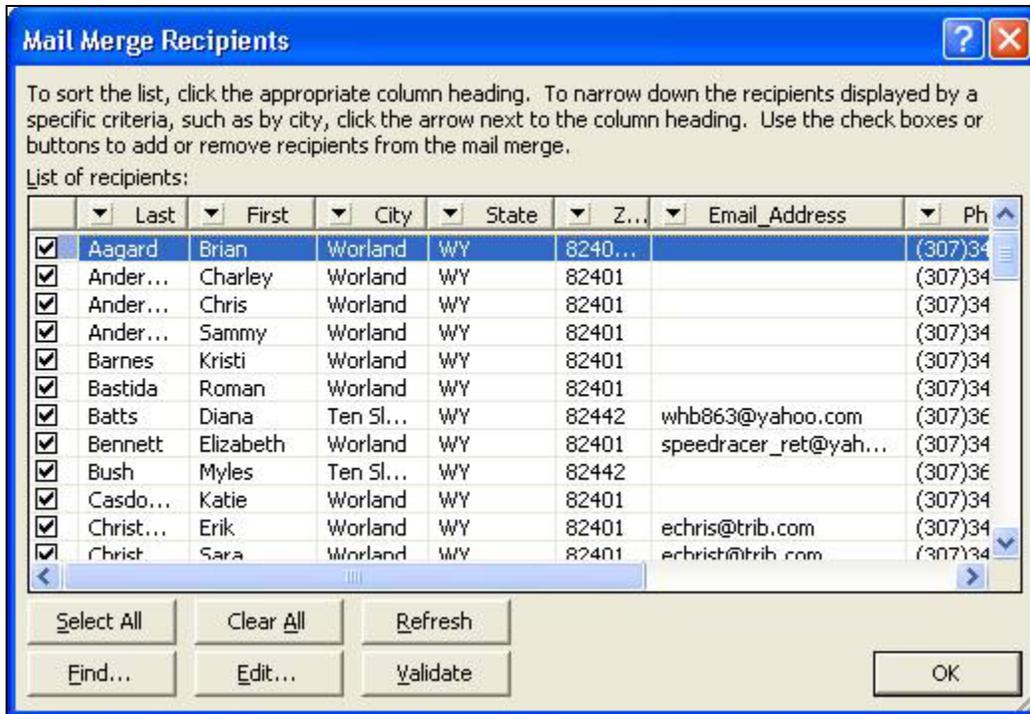


Figure 3. Mail Merge Recipients

18. Click the [Address Block](#) link in the *Write your letter* section. The *Address Block* dialog box displays.
19. 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.

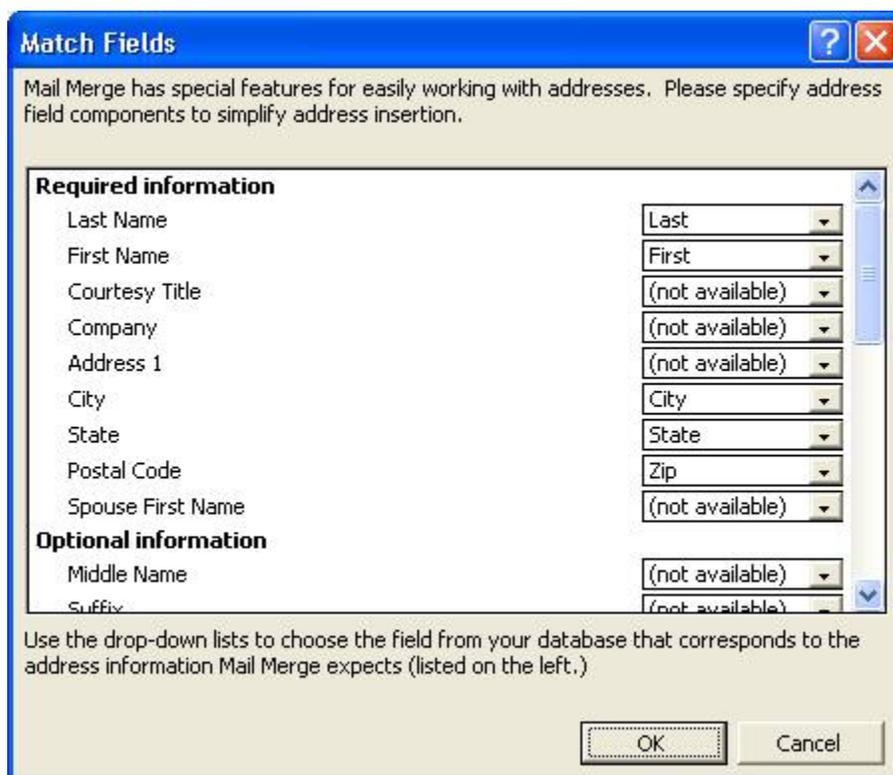


Figure 4 - Match Fields

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.



Figure 5. Greeting Line

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

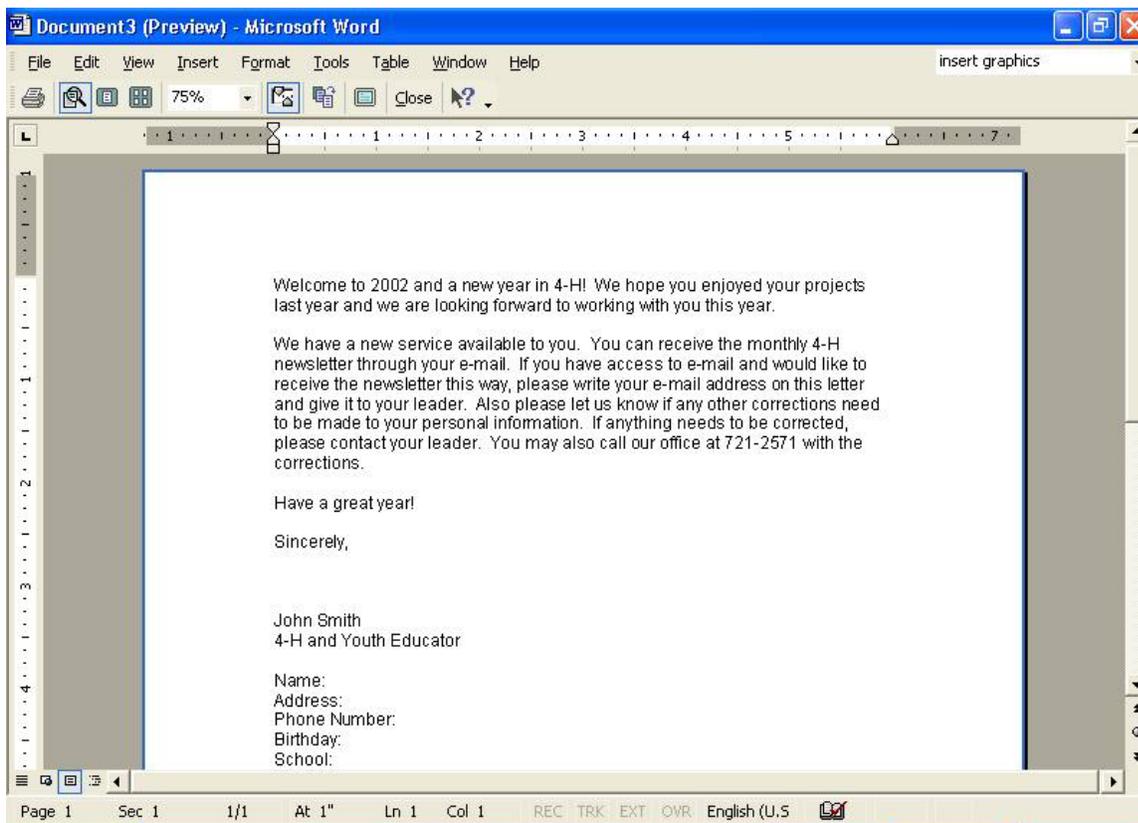


Figure 6. Sample Letter

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.

36. In the Mail Merge task pane, click the [More items](#) 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.

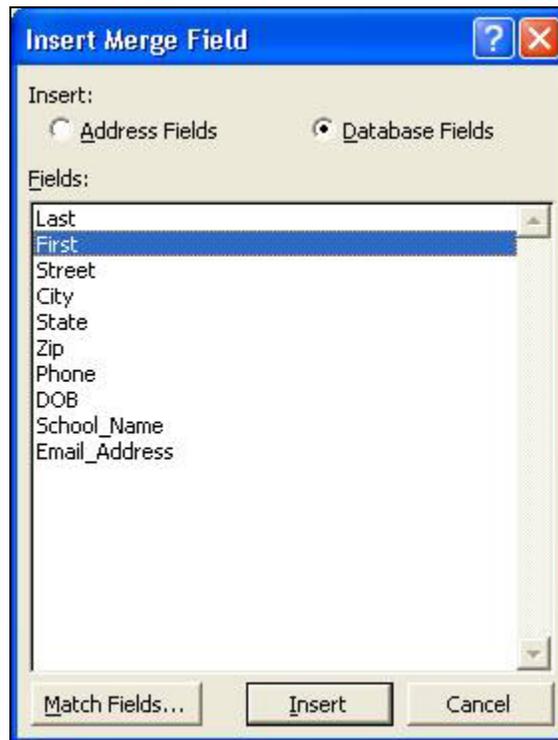


Figure 7 - Insert Merge Field

40. Press the **spacebar** to add a space after <<First>>.
41. Click the [More items](#) 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 [More items](#) 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 ½" mark on the ruler.

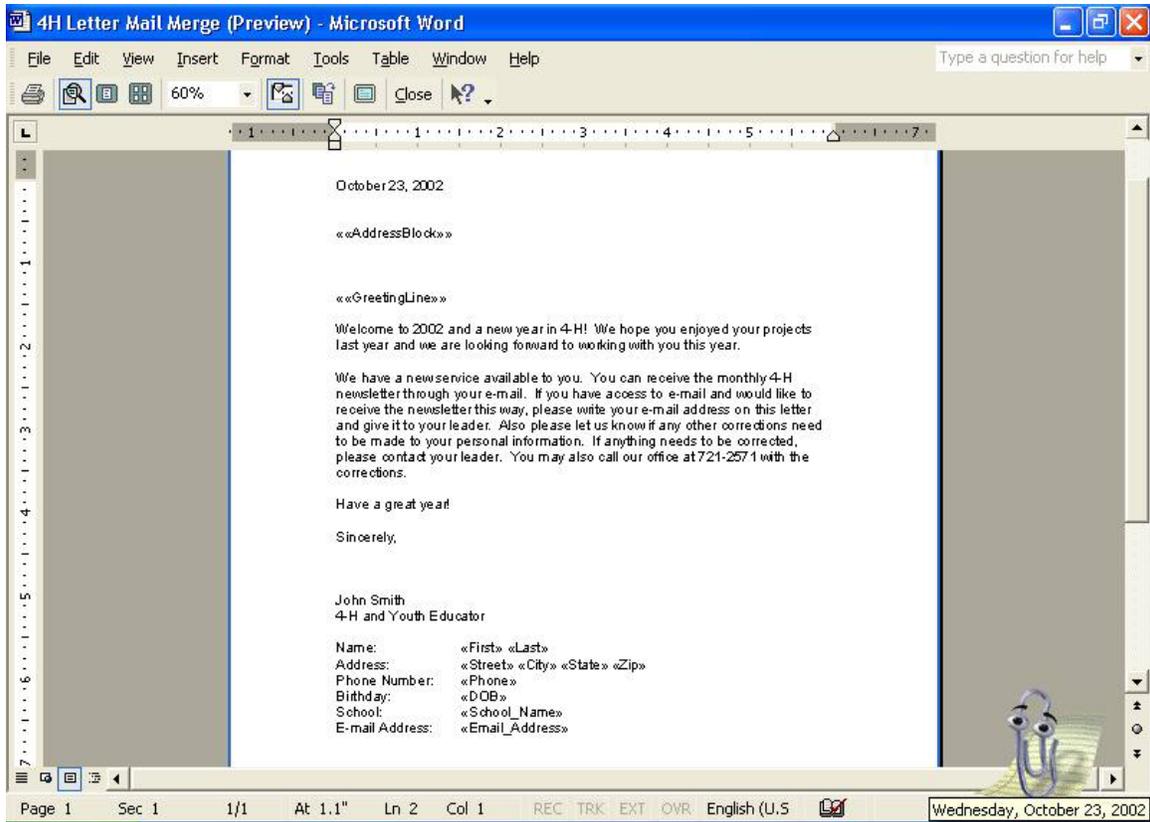


Figure 8 - Final Letter

67. Click the [Next: Preview your letters](#) 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 [Previous: Write your letter](#) link to make changes to the letter. Click [the Previous: Select recipients](#) link and the [Edit recipient list](#) 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.