

Totally 4 Mail Merge

What is Mail Merge?

Definition from Wikipedia: Mail merge is a computer term describing the production of multiple (and potentially large numbers of) documents from a single template form and a structured data source. This technique is used to create personalized letters and pre-addressed envelopes or mailing labels for mass mailings from a database of names and addresses.

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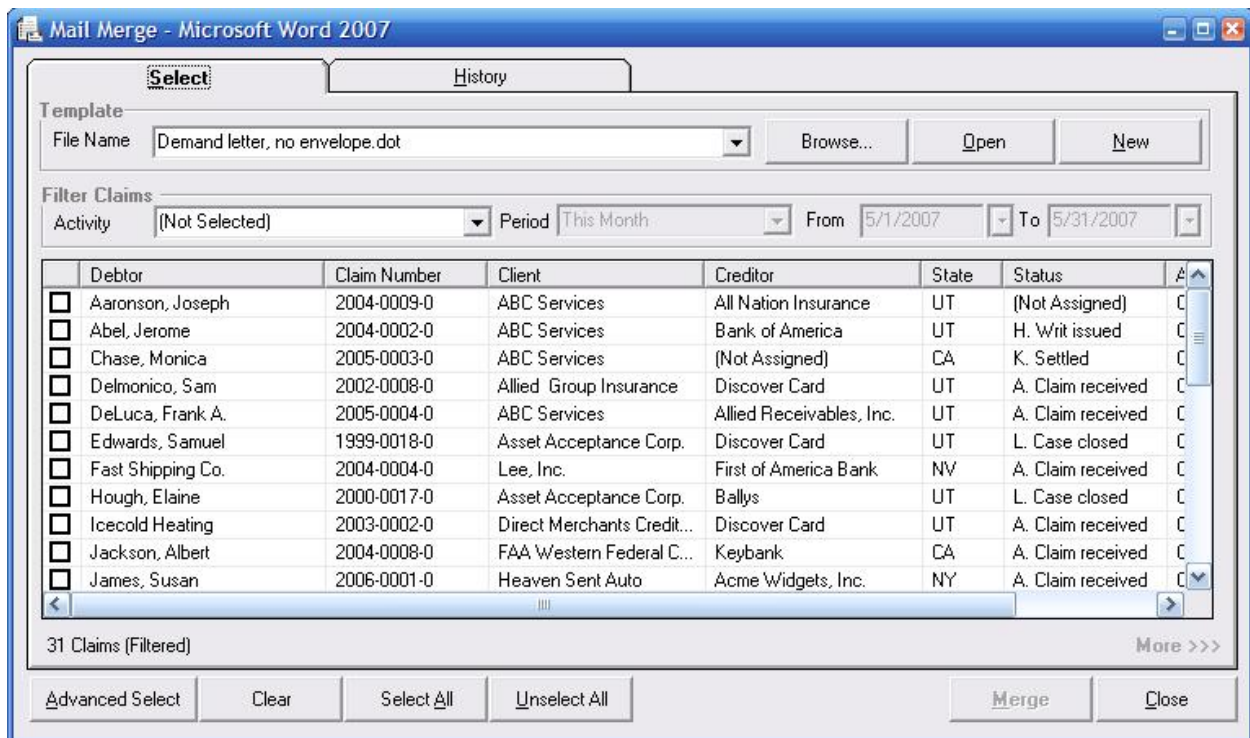
Chapter 1. Creating and Editing Merge Templates starting in Totality.

Chapter 2. Creating Merge Templates starting in Microsoft Word.

Chapter 1

How to create a NEW or edit an existing Merge Template in Microsoft Word or Corel Word Perfect starting out in Totality.

1. Open Totality
2. Click Mail Merge from the Navigator, the toolbar, or the Tools menu.
3. From the Mail Merge window select any template:
 - (i) for **Word** - with the .dot extension from the File Name field.
 - (ii) for **Word Perfect** - with the .frm extension from the File Name field.



4a. **If you are creating a new template:** Click the NEW button to open the word processor associated with the template you chose. The New Template will generate all the mail merge fields used in totality. Select all of the text (the merge fields) and delete it. You should now have a blank page.

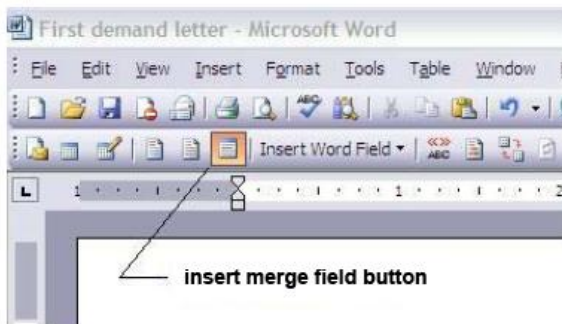
4b. **If you are modifying an existing template:** Click the OPEN button to open the word processor associated with the template you chose.

5. If you're creating a new document you can now either create your new template from scratch OR cut and paste in your pre-made document, otherwise continue to the next step.

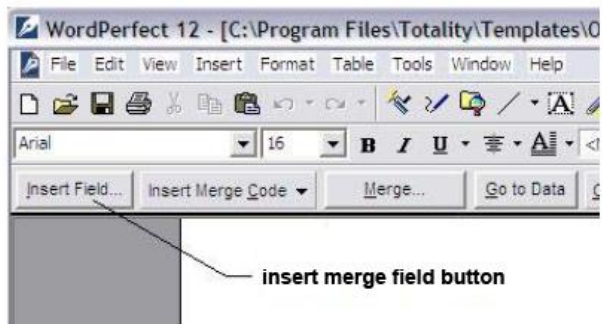
6. The merge fields must now be inserted to create a true mail merge template. The process is repetitive. First position the curser at the appropriate insert point on the template and then:

- (i) for **Word** - from the word toolbar click "Insert Merge Fields". (this should be the icon on the left of the "Insert Word Field" dropdown menu).
- (ii) for **Word Perfect** - from the toolbar select "Insert Field"

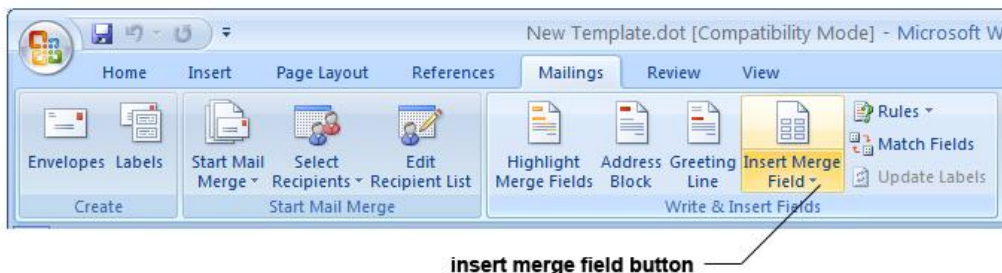
Microsoft Word 2003



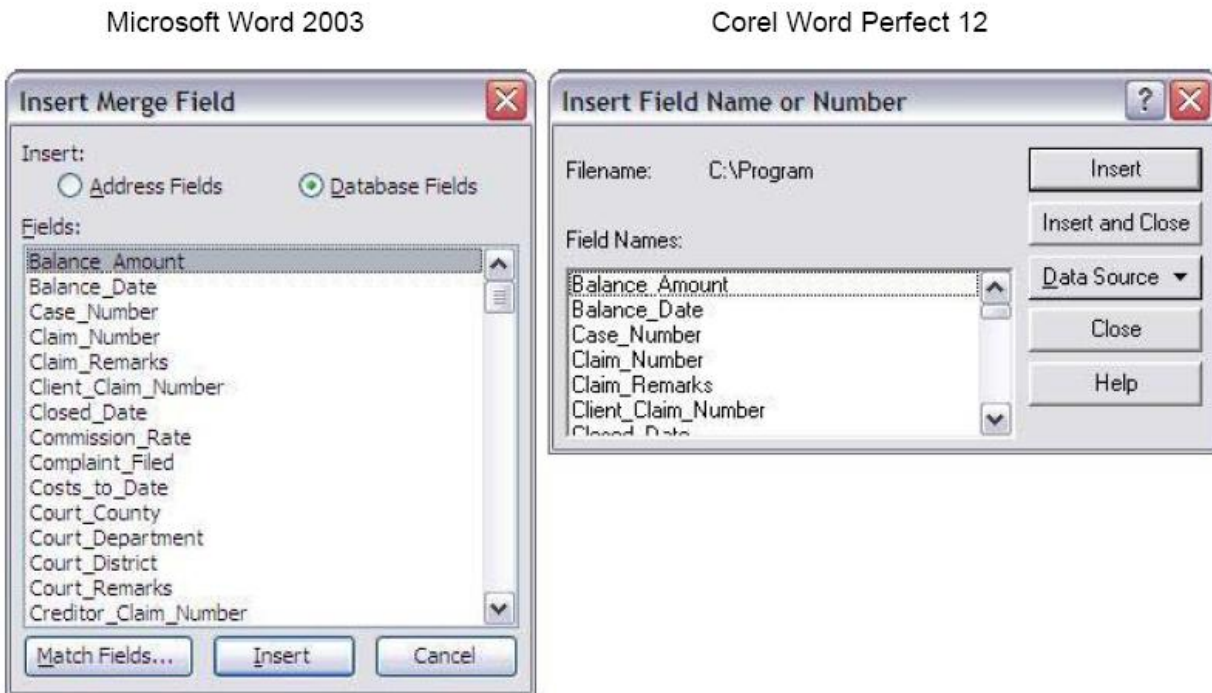
Word Perfect 12



Microsoft Word 2007



7. The following popup dialog box will appear. From here select the merge field required and click insert.



8. Close the dialog box, reposition the mouse to the next position that needs a merge field, and repeat the procedure.

9a. **If you created a new template:** When saving the template, select **SAVE AS...** and choose a new template name so as not to overwrite an existing template. Totality will set the document type and the location to save the template. Your new template should now be available in Totality. Close and reopen the merge window to see if your template is available in the File Name field dropdown. In some cases you may need to close and re-open Totality.

9b. **If you edited an existing template:** Once you have modified the form to your liking it's time to save the file. It is recommended to click **SAVE**, T4 will save to the correct location and in the correct format. Be Careful.....selecting **SAVE AS** may mean that your editor places the template in the wrong location.

Chapter 2

Creating a Merge Template starting in Microsoft Word

The following text is taken directly from Microsoft's online help and has been modified for use with Totality. To view this article in its entirety and in its original form please visit: <http://office.microsoft.com>

Start the mail merge process

To start the mail merge process:

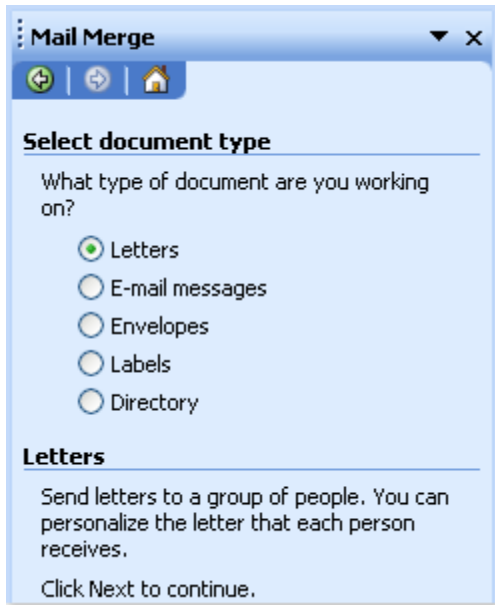
1. Start Word and open the document you wish to convert to a template for Totality, you may use a blank document if you wish.
2. On the **Tools** menu, point to **Letters and Mailings**, and then click **Mail Merge**.

Note: In Word 2002, on the **Tools** menu, point to **Letters and Mailings**, and then click **Mail Merge Wizard**.

The **Mail Merge** task pane opens. By using hyperlinks in the task pane, you navigate through the mail-merge process.

Choose the type of document you want to merge information into

The **Mail Merge** task pane opens with a question about what type of merged document you are creating. After you choose, click **Next** at the bottom of the task pane.

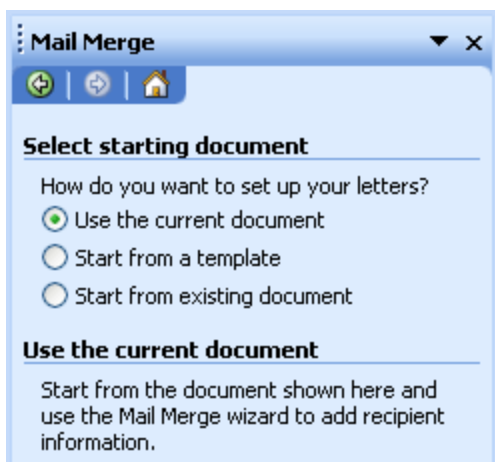


Note If you don't see the Mail Merge task pane, on the **Tools** menu, point to **Letters and Mailings**, and then click **Mail Merge** (or **Mail Merge Wizard**, if you're using Word 2002).

If you have fax support set up on your computer and a fax modem installed, you will also see **Faxes** in the list of document types.

Choose the main document you want to use

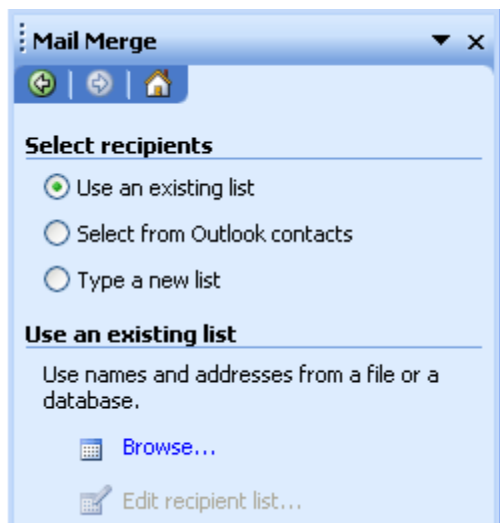
If your main document (called the **starting document** in the task pane) is already open, or you are starting with a blank document, you can click **Use the current document**.



Otherwise, click **Start from a template** or **Start from existing document**, and then locate the template or document that you want to use.

Connect to the data file

In this step in the mail-merge process, you connect to the data file where the unique information that you want to merge into your documents is stored.

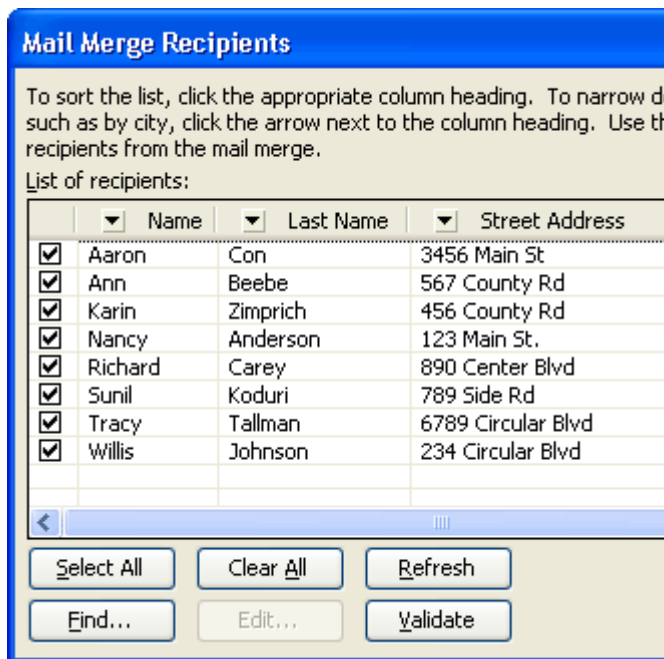


Click **Use an existing list**, and then click **Browse** to locate the Totality 4 merge file. In most cases the file "Totality4_merge.txt" can be found in C:\Program Files\Totality\Data\Mail Merge\Documents.

Choose the records in the data file that you want to use

Just because you connect to the Totality data file doesn't mean that you have to merge information from all the records (rows) in that data file into your main document.

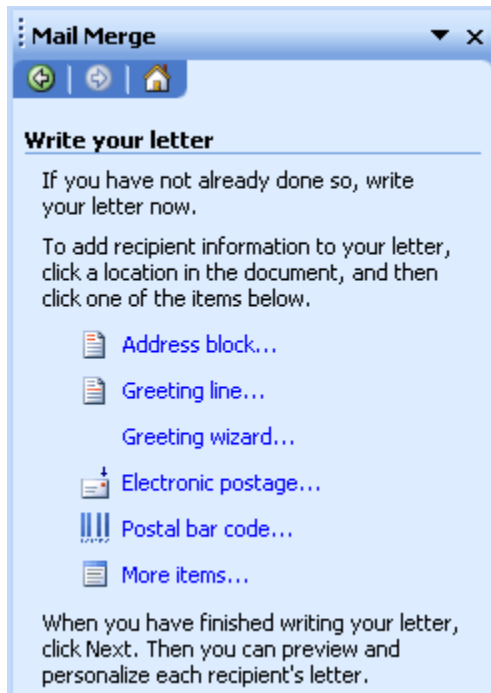
After you connect to the data file, the **Mail Merge Recipients** dialog box opens. Close this box and continue.



Add fields

If your main document is still blank, type the information that will appear in each copy. Then, add fields by clicking the hyperlinks in the task pane.

Fields are placeholders that you insert into the main document at locations where you want unique information to appear. For example, you can click the **Address block** or **Greeting line** links in the task pane to add fields near the top of a new product letter, so that each recipient's letter contains a personalized address and greeting. Fields appear in your document within chevrons, for example, «**AddressBlock**».



If you click **More items** in the task pane, you can add fields that match any of the columns in your Totality data file. For example, you might include the **Debtor Name** in your document by putting the **Debtor Name** field into the location you wish it to appear.

Once you have placed all your fields in the proper locations it's time to save the document. When you save the main document, be sure to select the file type of .DOT (Document Template) and save the file to the C:\Program Files\Totality\Templates folder, this way they will be readily accessible from within Totality.

For more detailed instructions using the Mail Merge function in Microsoft Word for projects that do not involve Totality, please visit <http://office.microsoft.com> .