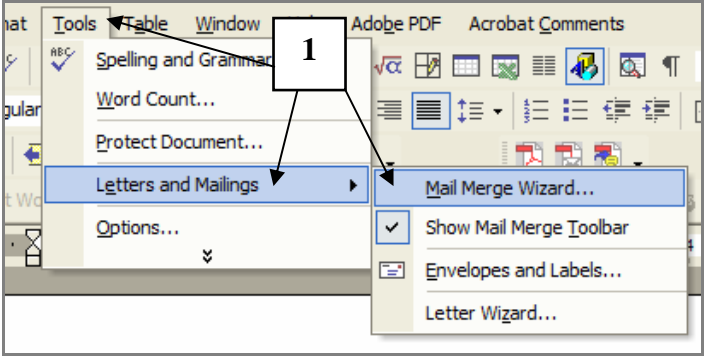
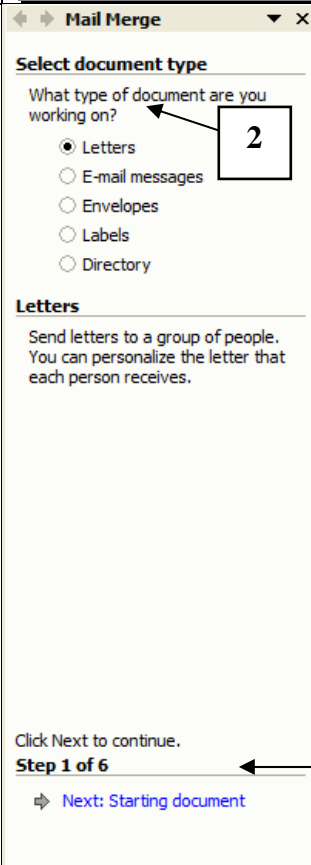


List Price Catalog Mail Merge Instructions

12.2.42	Run Menu Path 12.2.42 – Customer List Price Multiplier Report (FT only). This will put a file in C:\Pick called ft.txt
This file will contain the <i>Customer Number</i> , <i>Customer Name</i> , <i>Customer Addresses</i> , The <i>customer’s multiplier</i> , and the two different <i>customer prices</i> (based on the customer’s multiplier) for the example part number given, G31-705, in case you decide to use that letter, and the customer’s phone numbers. The fields that will be used in the mail merge are the <i>customer name</i> , <i>address</i> , <i>multiplier</i> , <i>G31-705 price</i> and <i>24 lot price</i> . The Customer number and phone number are for your reference.	
Next, open the letter you intend to use in Microsoft Word.	
Make any necessary edits that will be consistent on each of the letters (for example, your city, the owner’s name etc...)	
1	Next, click on TOOLS, then select LETTERS & MAILINGS, then select MAIL MERGE WIZARD.
	
2, 3	<p>On the “Select the Type of Document” window, select Letters². Then select the “Next: Starting Document”³ at the bottom of the window.</p> 

4, 5

Mail Merge

Select starting document

How do you want to set up your letters?

- Use the current document
- Start from a template
- Start from existing document

Use the current document

Start from the document shown here and use the Mail Merge wizard to add recipient information.

Step 2 of 6

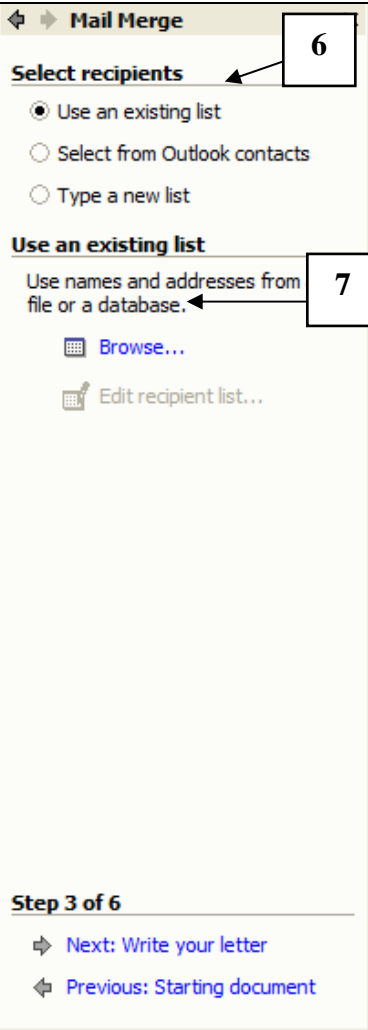
Next: Select recipients

Previous: Select document type

On the “Select Starting Document” window, select “**Use the current document**”.

Then select the “**Next: Select recipients**” at the bottom of the window

6, 7

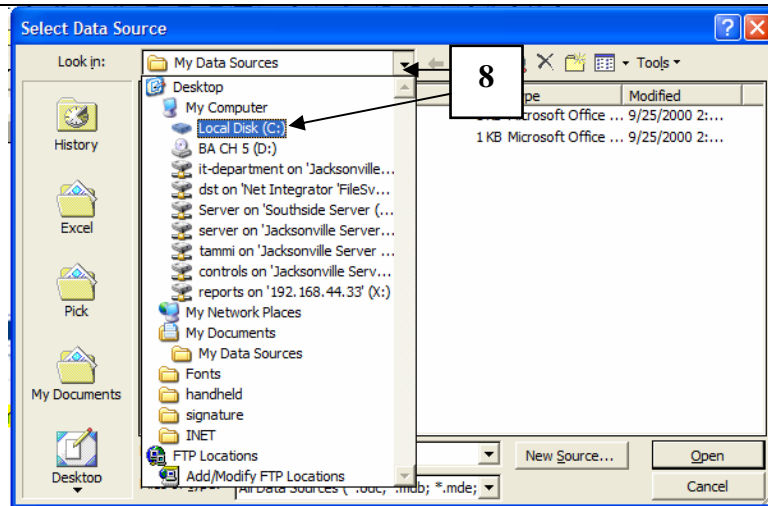


On the “Select Recipients” window, select “Use an existing list”⁶,
Just below, where it says “Use Existing List” select **Browse**⁷.

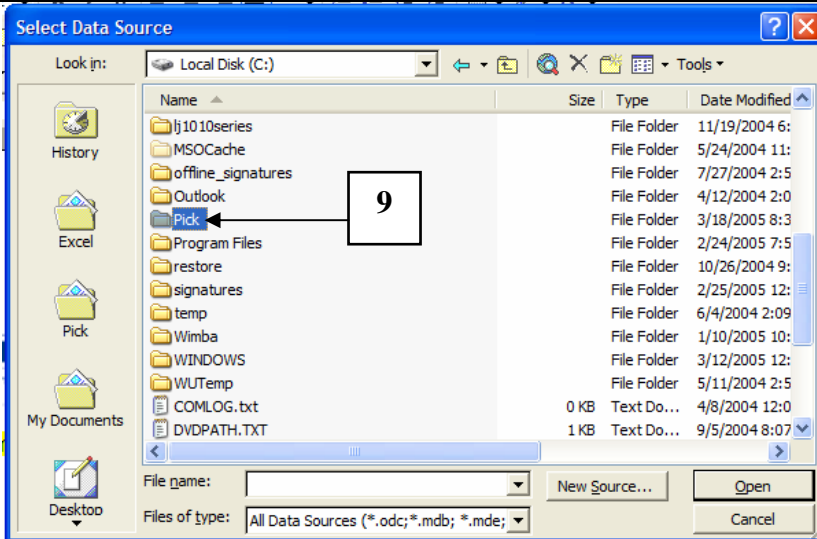
8

This will open up the Open file dialog box with the “My Data Sources” folder open.

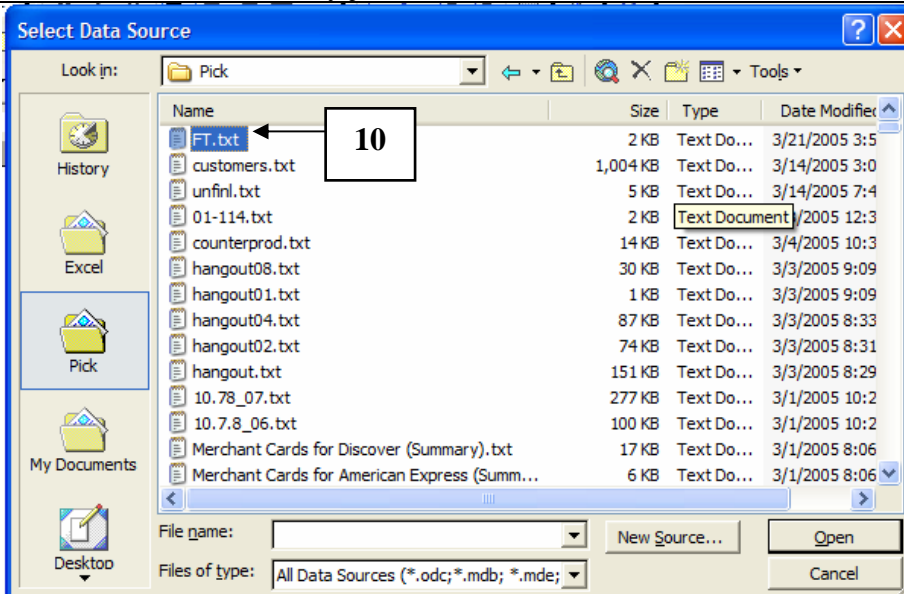
Click the drop down for Look In (where it says My Data Sources) and select the **Local Disk C:** drive.



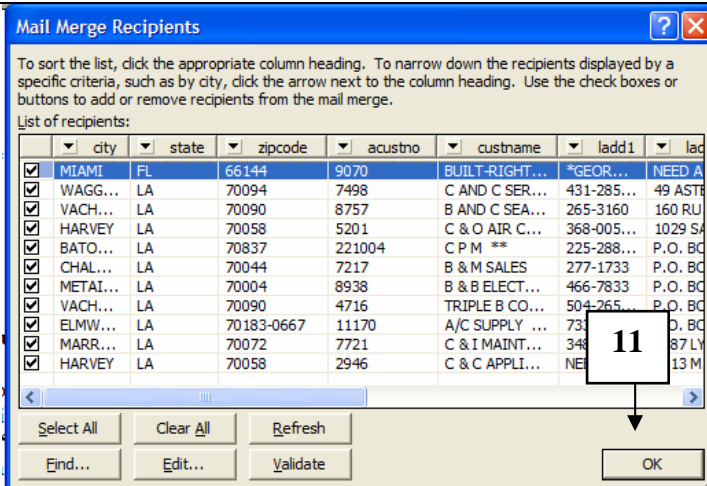
9 Then double-click on the Pick folder



10 Select the 'ft.txt' file (may just be 'ft')



11 The recipient list will be displayed on the screen, click OK.



12

Mail Merge

Select recipients

- Use an existing list
- Select from Outlook contacts
- Type a new list

Use an existing list

Currently, your recipients are selected from:
[:\Pick\ft.csv] in "ft.csv"

- Select a different list...
- Edit recipient list...

Step 3 of 6

- Next: Write your letter
- Previous: Starting document

On the Wizard screen, select “Next: Write your letter”

In the next step you will create your mail merge fields

13

Mail Merge

Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- Address block...
- Greeting line...
- Electronic postage...
- Postal bar code...
- More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

Step 4 of 6

- Next: Preview your letters
- Previous: Select recipients

Place your cursor in the area of the letter where the address will go and click on ‘More Items...’

14 You will be presented with the Insert Merge Field window. First, select Customer_Name and click Insert, then close.

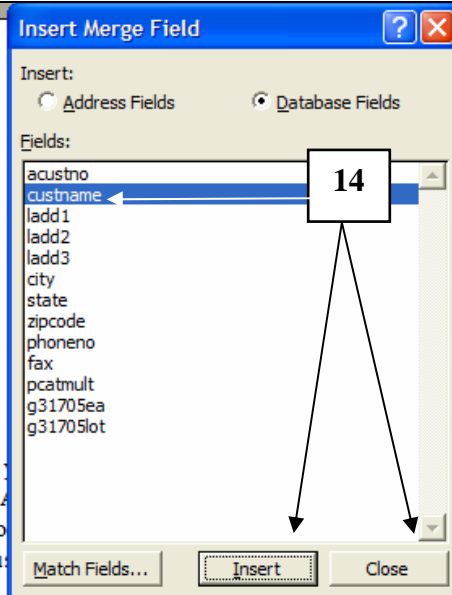
Sample Letter # 3

March 24, 2004

«custname»

Dear Valued Customer,

The mail will soon be delivering
featuring easy find product tabs. A
that it reflects "List" prices. No
product information with your cus



15,
16 Move your cursor to the next line, for the first address line¹⁵, then repeat step 12, only selecting ldd2¹⁶ (the second address line) this time. Repeat these two steps until you have added merge fields for each piece of the address. **IMPORTANT: Remember to put the comma (,) and spaces in for the City, State and Zip code.**

Sample Letter # 3

March 24, 2004

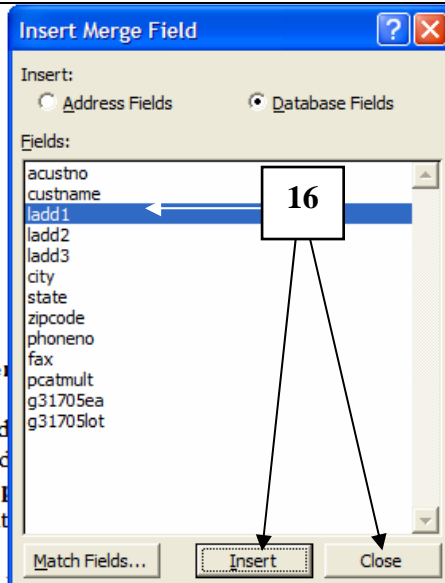
«custname»

«ladd1»

Dear **15** Customer

The mail will soon be d
featuring easy find prod
that it reflects "List" p
product information wit

Your multiplier is .45



17 In the end, your address block should look like this:

March 21, 2005
 «custname»
 «ladd1»
 «ladd2»
 «ladd3»
 «city», «state» «zipcode»

17

*****The following 7 steps only apply if you decide to use Sample letter #3, which shows an example of how the list price times multiplier works.*****

1, 2 Select the sample multiplier in the letter as shown below¹, then select MORE ITEMS... from the wizard and select pcatmult², then press Insert² and close².

Dear Valued Customer,

The mail will soon be delivered featuring easy find product tabs that it reflects prices. Product information with your product information.

Your multiplier is .45 times. Johnstone G31-705 smoke .45 = \$25.00 net. Or if you cost is \$50.22 x .45 = \$22.60.

Pricing may vary due to monthly errors, etc. Other seasonal, monthly net pricing.

Useful information and up to the available 24/7 at our website.

Insert Merge Field

Insert:
 Address Fields Database Fields

Fields:

- acustno
- custname
- ladd1
- ladd2
- ladd3
- city
- state
- zipcode
- phoneno
- fax
- pcatmult
- g31705ea
- g31705lot

Match Fields... Insert Close

Repeat steps 1 & 2 for the other Multipliers

3, 4 Next, select the sample each net price (25.00³), then select MORE ITEMS... from the wizard and select g31705ea⁴ and press Insert⁴ and Close⁴.

Dear Valued Customer,

The mail will soon be delivering featuring easy find product tabs that it reflects prices. Product information with your product information.

Your multiplier is «pcatmult». 333: A Johnstone G31-705 smoke \$55.65 x .45 = \$25.00 net. Or if you cost is \$50.22 x .45 = \$22.60.

Pricing may vary due to monthly errors, etc. Other seasonal, monthly net pricing.

Useful information and up to the available 24/7 at our website.

Insert Merge Field

Insert:
 Address Fields Database Fields

Fields:

- acustno
- custname
- ladd1
- ladd2
- ladd3
- city
- state
- zipcode
- phoneno
- fax
- pcatmult
- g31705ea
- g31705lot

Match Fields... Insert Close

Repeat steps 3 and 4, only selecting the 24-lot net price in the letter and the g31705lot from the Merge fields. When you are finished it should look like the image below:

Your multiplier is «pcatmult» times the list price in the catalog. For example on page 333: A Johnstone G31-705 smoke detector has a list price of \$55.65 ea. Your true cost is $\$55.65 \times \text{«pcatmult»} = \«g31705ea» net. Or if you purchased 24 lot with the list price of 50.22, your true cost is $\$50.22 \times \text{«pcatmult»} = \«g31705lot» .






5

Mail Merge

Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

-  Address block...
-  Greeting line...
-  Electronic postage...
-  Postal bar code...
-  More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

Click “Next: Preview your letters”⁵

Step 4 of 6

- Next: Preview your letters
- Previous: Select recipients

5

6,
7

Mail Merge

Preview your letters

One of the merged letters is previewed here. To preview another letter, click one of the following:

<< Recipient: 1 >>

Find a recipient...

Make changes

You can also change your recipient list:

Edit recipient list...

Exclude this recipient

When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments.

Step 5 of 6

Next: Complete the merge

Previous: Write your letter

On this screen you will be able to see the data from the merge fields actually merged into the document⁶.

6

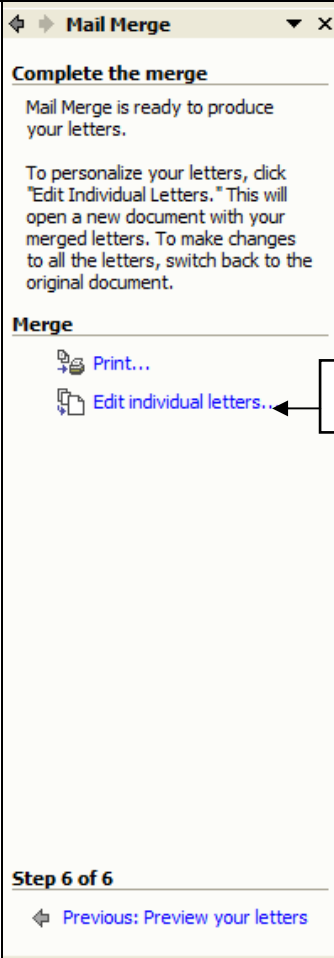
AA Heating & Air
1234 Mockingbird Ln.
Suite 500
Ormand Beach, FL 32222

Your multiplier is 0.55 times the list price in the catalog. For example on page 333: A Johnstone G31-705 smoke detector has a list price of \$55.65 ea. Your true cost is $\$55.65 \times 0.55 = \23.00 net. Or if you purchased 24 lot with the list price of 50.22, your true cost is $\$50.22 \times 0.55 = \20.00 .

Double check all data to make sure it is correct and formatted correctly, then click “Next: complete the merge⁷”

7

8



On the final screen of the Mail Merge Wizard, step 6 of 6, select “Edit Individual Letters”
By selecting this, the individual merged letters will be printed to a new document, separate from the mail-merge. You may then look over each letter, save the new document, and print them.

9 After you click Edit Individual Letters, you will be prompted for which records to merge. Leave All selected and click OK.

