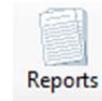


## Preparing Manager SE Data to Work with Mail Merge (MS Word 2010)

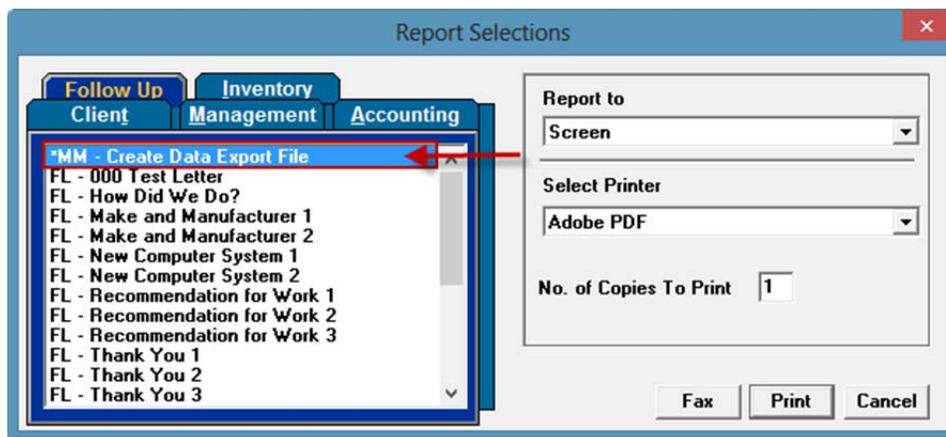
Using Manager SE with Mail Merge results in more personalized and professional looking customer communications. This document shows how to run a special query from the Manager SE Reports menu to prepare an output file that can be used by Mail Merge to add actual customer service data to each recipient's letter. NOTE: While other versions of Word differ slightly, they do work in a similar fashion.

### Part 1: Running a Query from Manager SE Reports to Prepare Data File



Step 1: In Manager SE, click on Reports and select the Followup tab.

Step 2: Double-click on \*MM – Create Data Export File to open the Followup tabs.



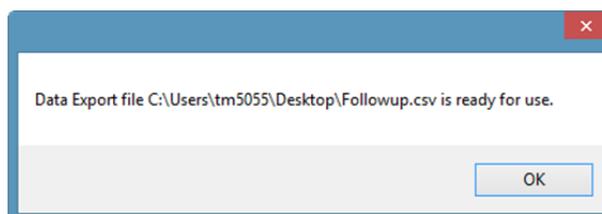
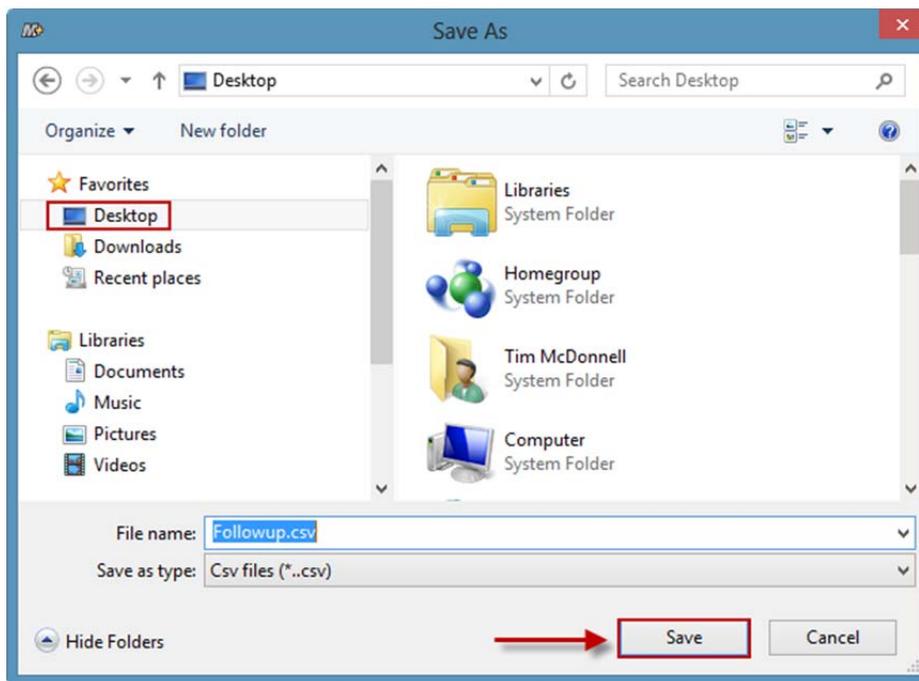
Step 3: Use the Followup tabs to determine which customer records will be on the recipients list according to activity, new customer [shown below], recommendations, inspections, service dates, etc. Click on Search to build the list of recipients.



Step 4: The resulting list is displayed in the View List tab. Click on Print to create the output file.



Step 5: The resulting file (Followup.csv) should be saved to preferred location (Desktop, etc.).

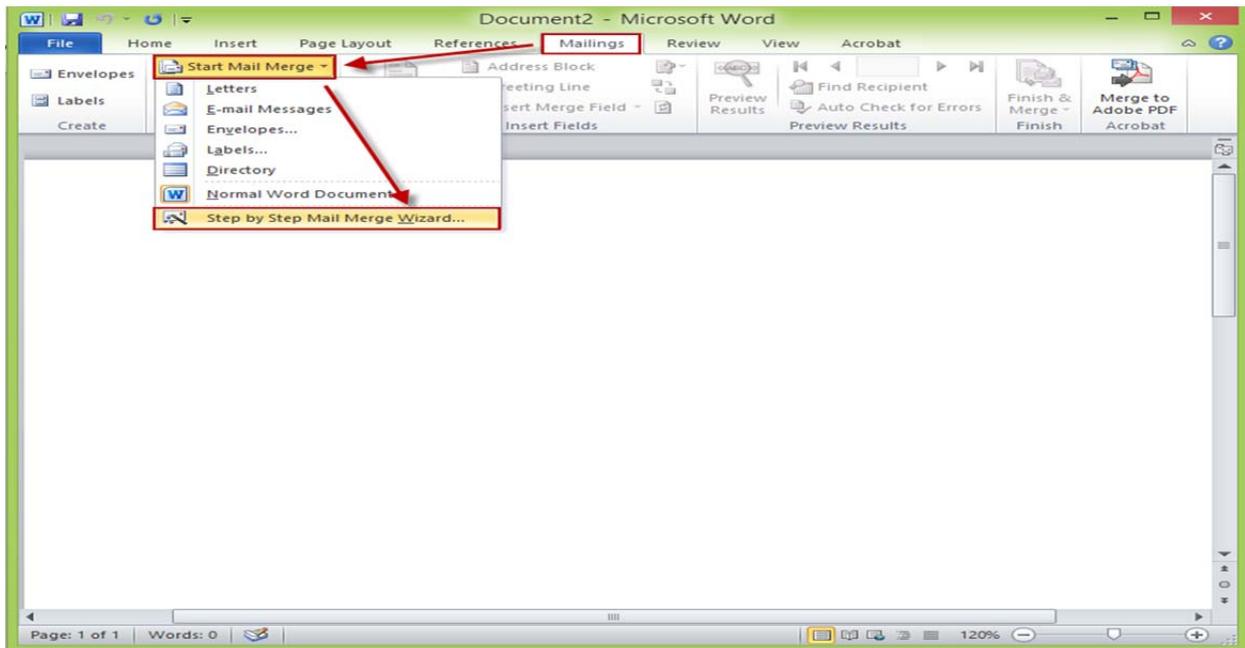


## Part 2: Starting a Mail Merge Document from Microsoft Word

Step 1: Open a new Word 2010 document, click on the Mailings tab.

Step 2: Select 'Start Mail Merge' and then Step by Step Mail Merge Wizard.

NOTE: If you have previous mail merge experience you can choose any of the options.



Step 3: Follow this 6 step Mail Merge wizard; define document type, new or from template, recipients list to use, writing the letter, inserting data fields, previewing the results and then printing the letters.

Mail Merge

**Select document type**

What type of document are you working on?

Letters  
 E-mail messages  
 Envelopes  
 Labels  
 Directory

**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

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

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:

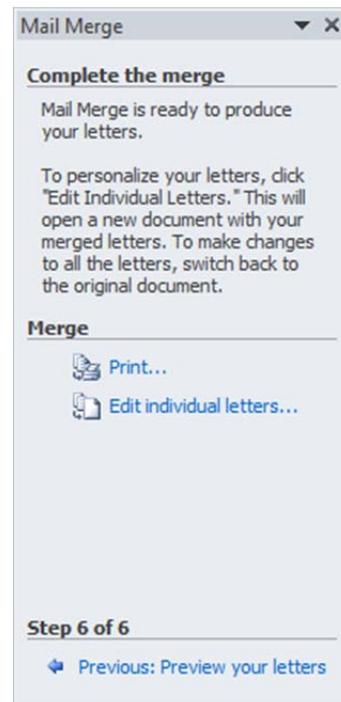
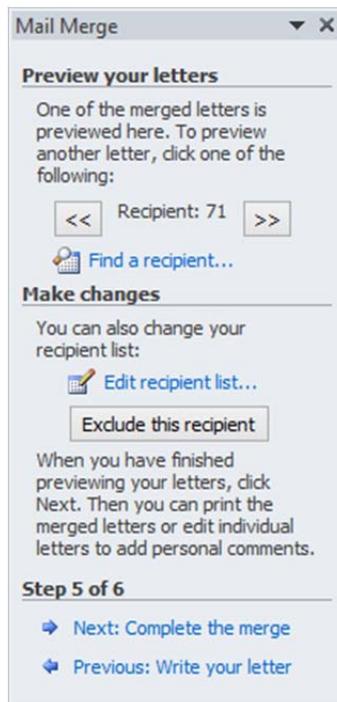
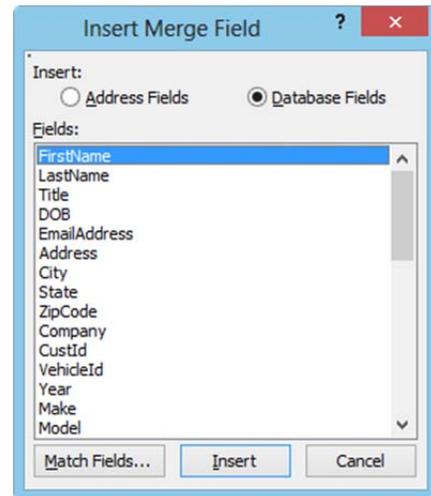
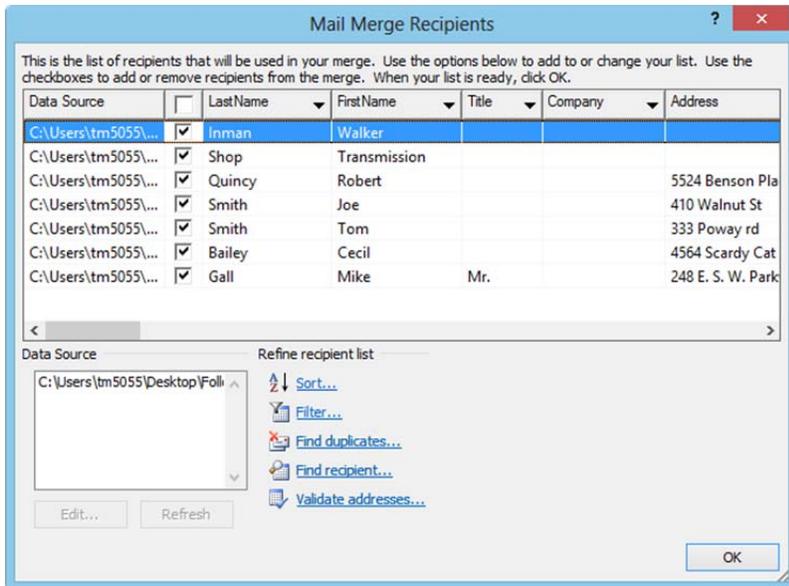
[:\Users\tm5055\Desktop\Followup.cs

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

**Step 3 of 6**

Next: Write your letter  
Previous: Starting document

During the wizard process when you select to use the data file from Manager SE, you'll be able to see the list of recipients for editing, SE customer data fields that are available to put into the letter body.





Click on Forum icon or  
go to [managerforum.net](http://managerforum.net)



Forum Knowledgebase Training Resources

*Discuss. Read. Watch. Learn.*

Step 4: Preview of the letter output reveals how each is going to look with Manager SE data inserted.

This is a very simple example to show the insertion of data fields with standard text. The second example is what the actual output would look like for each of the recipients.

Dear «FirstName»,

We wanted to remind you that your «Year» «Make» «Model» «License» is due for service.

Call us for an appointment and we'll get this done for you just as quick as we can.

«ShopName»

Dear Jeff,

We wanted to remind you that your 1993 Toyota Land Cruiser ROCKMAN is due for service.

Call us for an appointment and we'll get this done for you just as quick as we can.

Forward Thinking Automotive

There are numerous options to explore within Word Mail Merge that we cannot cover them all in this document. Please refer to the built in help files and documentation supplied by Microsoft for their product.

NOTE: As long as you save your recipient list (Followup.csv), it can be used for future mailings. If you need to create a list with different selection criteria, return to Manager SE Reports – Followup to build the new list. Click on Print to create the Followup.csv file to work with. Keep in mind that if you keep the file name and location the same it will overwrite (replace) the previous version.