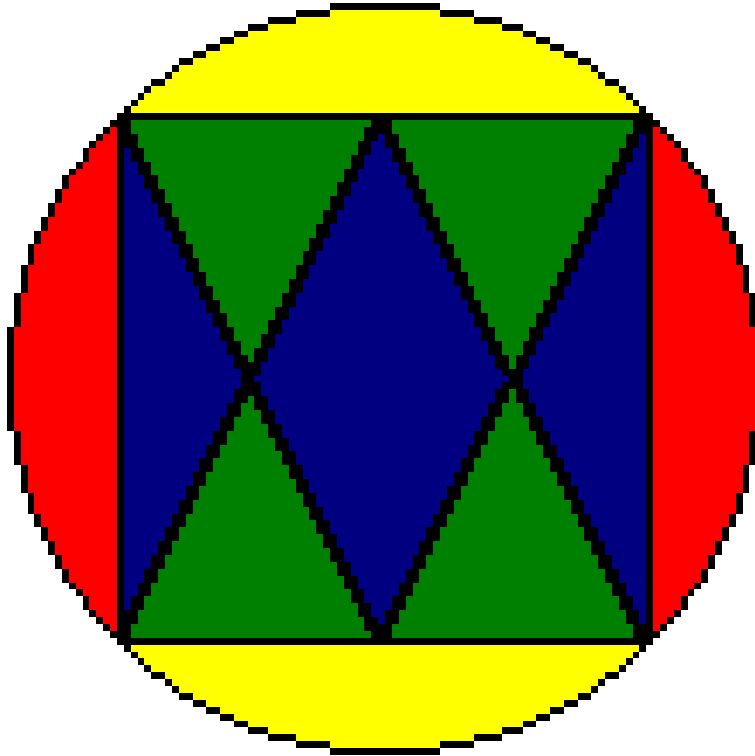


User guide

for



Hela,

the design fashion salon!

By Tim Guhl

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Introduction:

The user guide will be divided into three sections.

1. Explanations how mail merge works in general.
2. How to use the pre-set environment.
3. How to extend the environment to fit new needs.

The user guide will be aided by a training session, which will enable a user, that's you, with basic knowledge of word to understand and use this environment.

Part 1: What is mail merge?

The computer is able to store huge amounts of data. It is also used to edit documents, doing your word processing on the computer has the main advantage that you can save and later change the document if the need occurs.

Mail merge combines these two abilities. A mail merge document is produced in the following way. The user writes the document, often being a circular letter. He also has all the addresses stored on the computer. The difference between a normal document and a mail merge document is that the user did not put the names and addresses in directly, but a command for the computer. The computer then knows what to do and will fit the addresses of the people out of the address list in the right place.

When mail merge was first introduced it increased the amount of junk mail enormously. Now it was possible to write a letter on time and fit in 10000 addresses in a matter of seconds.

But the computer can do more. Not only can it fit in the right address but it can also make decisions whether to put in a passage of text depending on data stored in the database. And this is only one more example of the things it can do.

Part 2: How can you use the system?

The environment I created for you consists of a database that fits your needs and some standard documents I thought you will need. It is flexible, so whenever you want another document you can easily create it yourself.

I will first explain the database, why I included which field and how you can change the data and the base itself. Then I will explain how to use the existing documents and last you will be told how to set up the new documents.

The database:

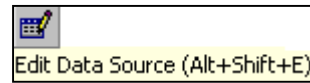
The database consist of the following fields:

Field name	Comment
Title	To address the person correctly.
Name	The name for address.
Surname	The surname for address.
Street	For the address.
Town	For the address.
Country	For the address.
Postcode	For the address.
Card level	The system I set up has tree levels, gold, normal gold and normal.
Birthday	To find out who to send the birthday letter.
Hela information requested	To run query on whether to sent information.
Other information requested	Query on whether to sell address and name to other companies.
Family status	To decide on how many places to reserve at invitations.
Sex	Decided to add later. Can make documents more personal (bring your husband/wife) and ask them to wear certain dress (please in black suit/long skirt)
Reward points.	To save how much money the customer spent in the last few weeks.

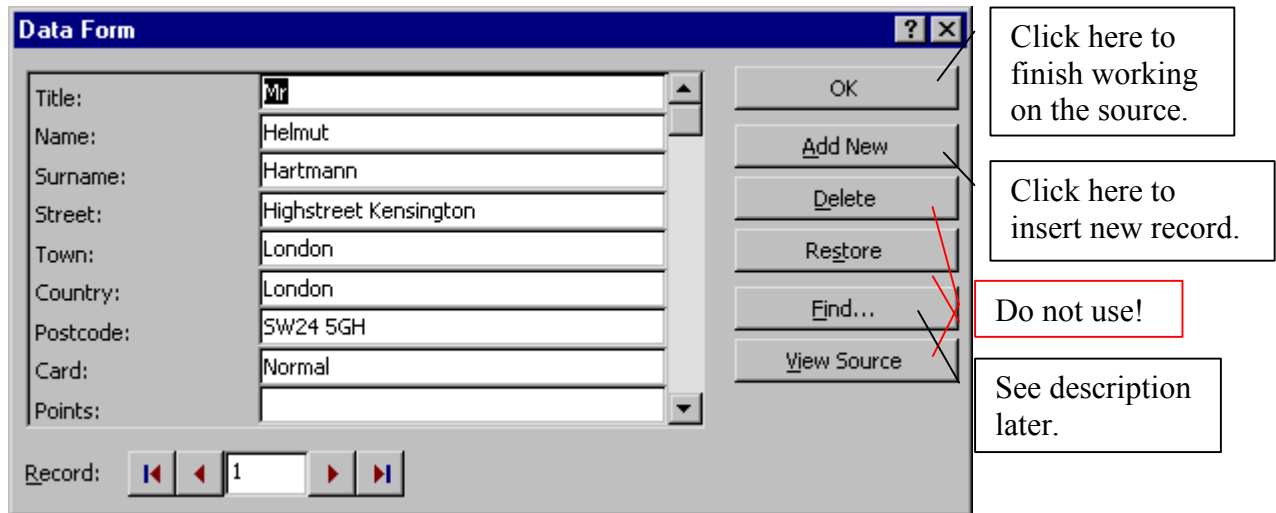
How do you enter new records into or change the database?

If you want to change the database you just open one of the documents starting with “MM”.

Then you will click on the little button looking like this:

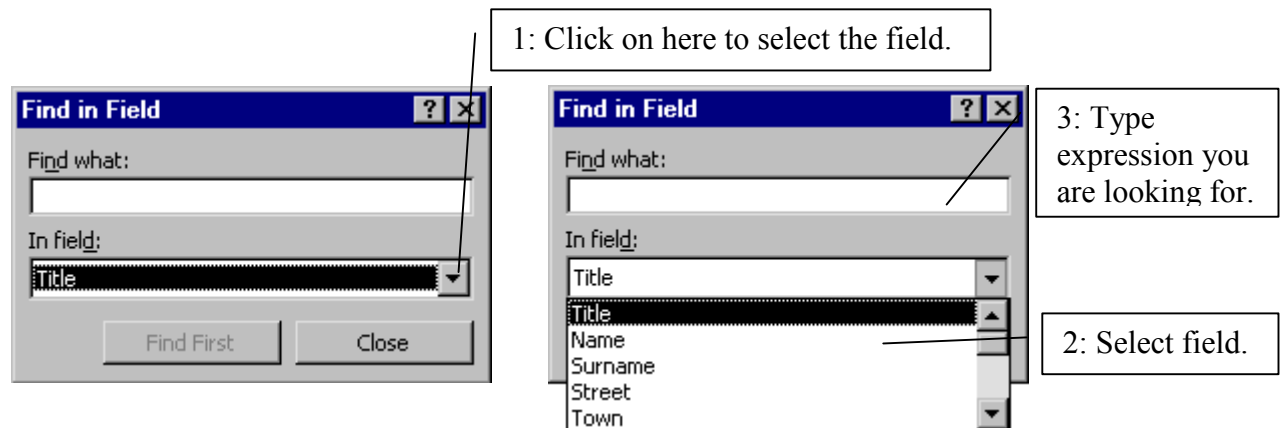


You will end up on the following screen:



This user interface gives you all possibilities to change the data.

To find a certain customer click on “Find...” and you will end up on the following screens:



After completing these first three steps, you click on Find first and it will select the first record it can find the letter-combination in for you. It is case sensitive. If this is not the right one you can continue searching by clicking on find next till you find the record you were looking for.

Above I said you may not use the delete button. That is because I used the record number as the customer id. If you now delete one record the id of all following customers is made one smaller. This would cause major confusion. Therefore if you need to delete a member, this case will hopefully never occur anyway, then you just insert deleted in the title. This will

cause the record to be ignored at any later stage. The only document the name will come up in is the “Sell information” as this will bring you some more money.

Formats of data:

Most of the fields are entered following common sense. There should be no doubt of you to enter the name of a person. The following though have to be entered in a certain way:

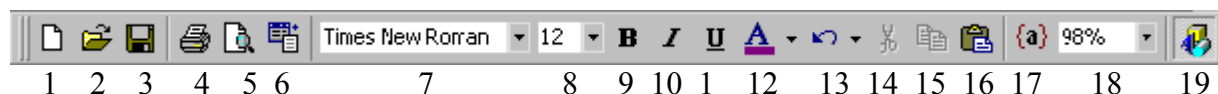
Field name	Format
Title	Mr, Mrs, Ms or deleted.
Card level	Gold, Normal or Normal gold
Birthday	1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5, 5.5, 6, 6.5, 7, 7.5, 8, 8.5, 9, 9.5, 10, 10.5, 11, 11.5, 12, 12.5. My special format works like this. For the first 15 days the value of the field is equal to the number of the month. From then onwards till the end of the month the value is equal to the number plus 0.5 (e.g. Birthday 2 nd of February, value in the field: 2; Birthday 18 th of February, value in the field 2.5).
Information Hela, information others.	y or n.
Family status	single, couple or family.
Sex	m or f.

It is important that you follow these instructions as the documents will not work otherwise.

The toolbars:

When you open one of the documents you should have two toolbars only.

Reward Card System:



- | | |
|---|-----------------------------------|
| Button 1: Open a new document. | and to make document a mail merge |
| Button 2: Open an existing document. | document if it is not one jet. |
| Button 3: Save the active document. | Button 7: Select Font. |
| Button 4: Print the active document. | Button 8: Select Font size. |
| Button 5: Print preview the active document. | Button 9: Bold. |
| Button 6: Open the mail merge helper. To change query options if active document is a mail merge document | Button 10: Italic. |
| | Button 11: Underline. |
| | Button 12: Change colour of text. |
| | Button 13: Undo last actions. |

Button 14: Cut.

Button 15: Copy.

Button 16: Past.

Button 17: Show field codes.

Button 18: Set zoom factor.

Button 19: Open Toolbar drawing.

Mail merge:

This toolbar should be open when you have a mail merge document as an active document.



Button 1: To insert a field of the database (e.g. “name”).

Button 2: To insert special functions like If-then-else statements.

Button 3: Switch between seeing merge data (e.g. “Mr.”) and description (e.g. “Title”).

Button 4: Go to first record.

Button 5: Go to previous record.

Button 6: Here you see and you can put in a certain record number.

Button 7: Go to next record

Button 8: Go to last record.

Button 9: Open the mail merge helper.

Button 10: Check document on errors.

Button 11: Mail merge into document to view first before printing.

Button 12: Mail merge document and print at once.

Button 13: Mail merge document.

Button 14: Search for record.

Button 15: Edit data source.


The documents:

Now I will describe one document after another. I advice you to look at the system while you read this and that you compare the system with the write-up and that you are not scared to try things out.

The documents I created for you are standard documents. They should not be changed if you are not sure you want to do so. So your standard answer when closing the file and when being asked whether you want to save it, will be “No”. You can say “Yes” but you should make sure you only change the things you want to change.

MM Header:

This is a document all other documents are based on. It is the letterhead I used for all other letters. The speciality is that the output is colourful if the user has risen to gold card level and only consists of black elements for normal card members.

To see what kind of output you get just click on  and you will be able to look at the output in a file.

You will use this document if you produce your own new documents.

MM Information:

This document was created for you to send out your junk mail. Whenever you have a new dress you think you should tell your customers about you run this document. For gold card members you will even have a picture of the dress on your most beautiful member of staff in the letter.

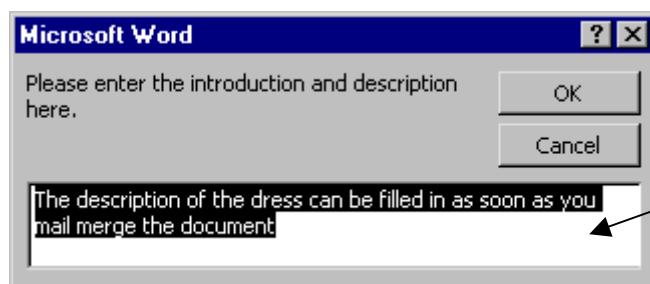
When you open the document you will see the following graphic is included in the text:

Steps to insert a picture:
Click on this picture.
Go to: Insert, Picture,
From file.
Select file.
File appears in document,
click (right button) on it.
Go to: Format picture
Go to: Position and de-
select Float over text.
Now click on me and press
Del.

If you follow these instructions you will be able to fit the picture of the dress you want to sell in there.

Also this picture will only be printed on gold card users letters. This will reduce your printing costs and will push up the speed.

When you mail merge the document you will see the following screen:



This is called a fill in box. Enter your description of the dress here and it will be filled in every single letter. So whenever you want to send out your junk mail you only have to enter the text one time and it will be fitted into all of your letters.

MM Invitation:

This document will be sent out if you want to invite your customers to a party or if you want to present your dresses on the catwalk.

Again I did use a fill in box for you to enter a description of your event in. This description again will be filled into each and every letter. The second speciality is that the document automatically tells the user how many places have been reserved for him. He will have to

confirm them but it will seem to him you thought about him personally and he will feel very honoured. The places are appointed following these rules:

1. No places are reserved for normal card users.
2. One place is reserved if your family status is “single”, two if it is “couple” and you are asked to tell staff how many if your family status is “family” as we do not know then.

MM New Year:

This letter is sent to gold card users only. Beginning of every year you appoint gold card users the decision being based on the quantities bought the previous year. Their card level is “gold”, the once who want to be gold, but are not appointed are “normal gold”. This document will go put to all gold card members (“gold” and “normal gold”). It will tell all appointed gold card users that they are appointed and ask all “normal gold” members to pay £30.

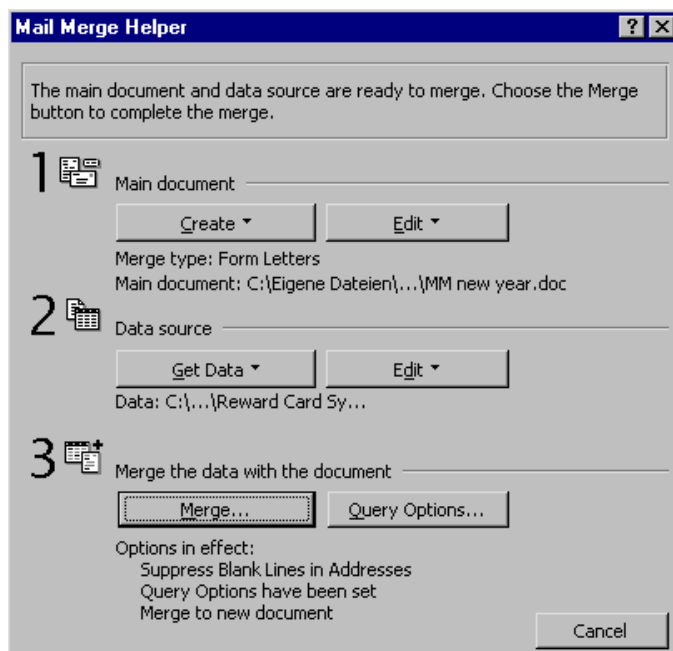
QUERIES:

This will be of use later. At the moment I only included it so that you start to understand queries.

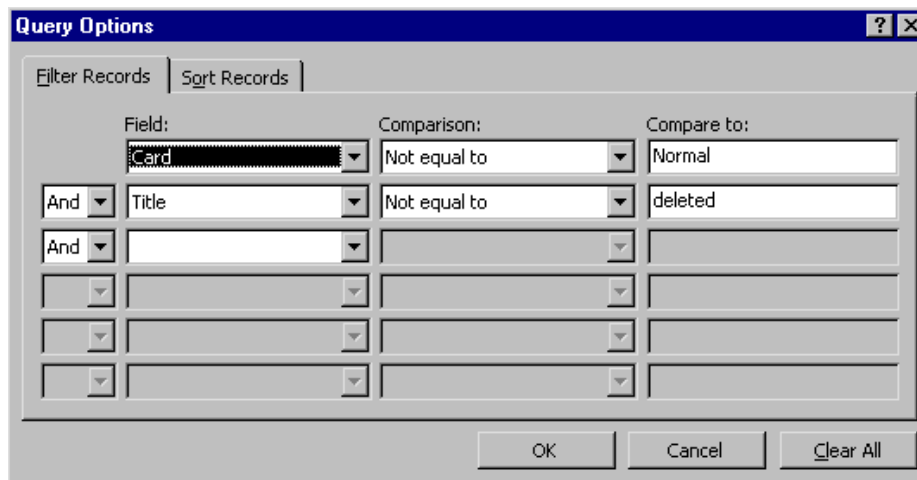
How come the computer only prints out this document for gold card users? If you click on



you will end up on the following screen:



After clicking on “Query Options” you will see this screen:



Now I will try to explain how this works. Query means the program will only output a document with the data of that record if the query rule is satisfied. So in this case if the card level is not equal to “normal” then the program will merge the data of that record into the standard document and you will have this as a output you can print. If the card level is equal to “normal” than the program will just ignore this record of data and go on to the next customer.

The query option “title” not equal to “deleted” is in every single document except “MM Sell address” because this is how you delete a customer from your database, remember?

MM Sell Address:

This document was created so that you can sell the addresses of customers which did not say they did not want you to, to other companies and earn some money out of the system.

The main difference is that all the other documents are set up to start a new page when they start a new data record. This one continues on the same page till it is full.

MM Welcome:

This document consists of two parts. Part one is a letter you send of to the customer. It welcomes the new member and tells the “normal gold” card users to pay £30. The second part consists of two parts again. One part is the user membership card. You only have to cut it out and laminate it. It tells you the card level (only whether gold or not gold), name and customer number.

The rest of the second page is a section with all data you have on the customer and this will act as a backup and a section where you can keep record of the reward points earned.

This document is normally printed when you enter a new customer. It will only be sent out to that single customer. Therefore I think you best bet might be to set a query option to Surname

equal to the surname. How to do so was described to you in the description of “MM New Year”. This will make sure you only print out the one. Otherwise you will have to select the document out of a long document containing a lot of documents and you will have to print the two pages only.

MM Birthday:

This document is sent to every user that’s birthday is coming up. I invented a special system for that. Why that? Well do you want to check every day whose birthday is coming up and then print out the document for him? NO! Therefore I designed this system.

My special format of saving the birthdays works like this. For the first 15 days the value of the field is equal to the number of the month. From then onwards till the end of the month the value is equal to the number plus 0.5 (e.g. Birthday 2nd of February, value in the field: 2; Birthday 18th of February, value in the field 2.5).

So if you print out the documents for all users with the value 2 entered on the 27th of January and put them in the post the next day some of them will be a little bit early but still in acceptable range of days. Then you print out the document for everyone with the value set to 2.5 on the 13th of February. You follow the same procedure for all the other months.

How to select the right records? Easy, in MM New Year I described the query tool. Use it. Here I included an example of the option settings.

Field:	Comparison:	Compare to:
Birthday	Equal to	3.5
And	Title	Not equal to
And		deleted

Buttons: OK, Cancel, Clear All


How to manage the reward points:

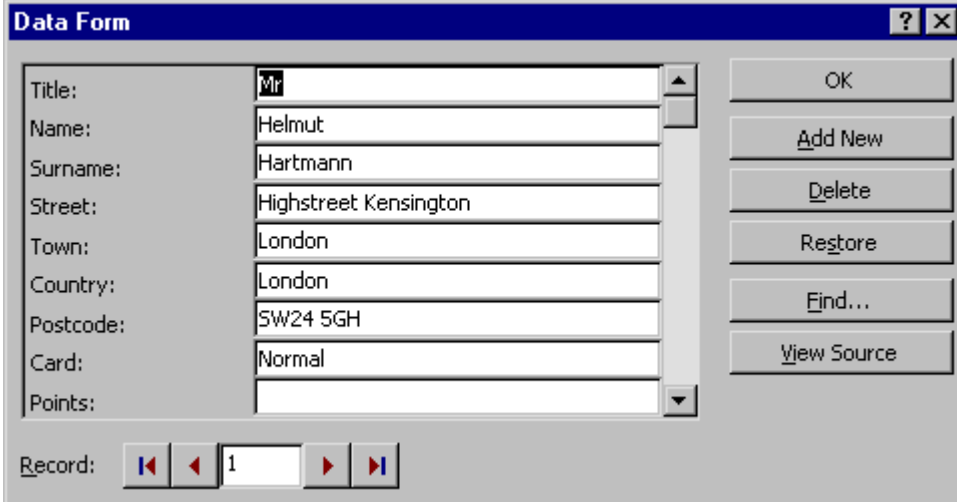
The system offers you two alternative ways of managing the reward points.

1. **Manual System:**





You use the second half of the Welcome letter. This sheet of paper is placed in a filing cabinet next to the till. Whenever a customer buys an article the member of staff will get the card and write down how many were earned. This filing cabinet will later be used to evaluate the customer and to pay him back the rewards.

2. **Automated System:**

I set up a field “reward points” in the database. The member of staff selling will open any of the mail merge documents and click on . Then he will be on the database user interface:



Data Form	
Title:	Mr
Name:	Helmut
Surname:	Hartmann
Street:	Highstreet Kensington
Town:	London
Country:	London
Postcode:	SW24 5GH
Card:	Normal
Points:	

Record:   1  

On the button you see the little field behind “Record:”. The member of staff will enter the customer ID on the customer membership card into this field. The member should come up. Otherwise you used the wrong way to delete a member. You can skip through the records as well. Use the < and > buttons. Then you can alter the value in the position “Points:”.



Part 3: Extending the system:

To create a new document to send to the user the most effective way is to open “MM Header”. Then you extend the document to the form you want and save it as something else. I would keep the tradition and start all mail merge documents with “MM”. This will keep your hard drive tidy.

You will also need some skills I will bring a little bit closer to you in this section. Please note this is only very comprehensive. It is only meant to bring back to memory what you learned in our teaching session. If you need more complete help, please refer to Microsoft Word help.

Inserting a merge field (like name):

Click on  and select the one you want from the list.


You can choose whether you want to see the full code or not by clicking on . You can also choose whether you want to see the actual text of the selected record or a simplified field code by clicking on .

Using the query options:

Please refer to the descriptions of “MM New Year” and “MM Birthday”.

Using Merge Fields:

Merge fields are functions offered by word to enable you to create a more flexible document.

Open the list to choose from by clicking on .

You will see the following list. How to use the different functions will be explained in Microsoft Word Help. I will only make the decision which one to use easier by explaining what they are.

Ask...	The user will be asked to put text in when he mail merges the document.
Fill-in...	
If...Then...Else...	If statement is true, then “output” if not then “else output”.
Merge Record #	Fits the number of the record you are printing into the text. In this case this is equal to the customer ID.
Merge Sequence #	
Next Record	
Next Record If...	
Set Bookmark...	
Skip Record If...	

This should be enough for now. If you want to extend you knowledge you can do a course and you can read it up in help.