

Mass Correspondence

Theoretical Part:

A typical example of using Mass correspondence can be entrance exams. Participants send a request; the school processes it and prepares an inviting letter for the entrance exam. There are important information inside the letter which tell the student for example the time and date of the exam and also necessary tools which should be brought. All letters are very similar but imagine you have 300 students and you want to write the same letter to all of them, you would only change several data which differ according to the students. This data is the first name, the last name, address, file number, reference number and date of birth. This would be a very long work which can be done much faster using the Mass correspondence. It even allows you to use different title according to their sex.

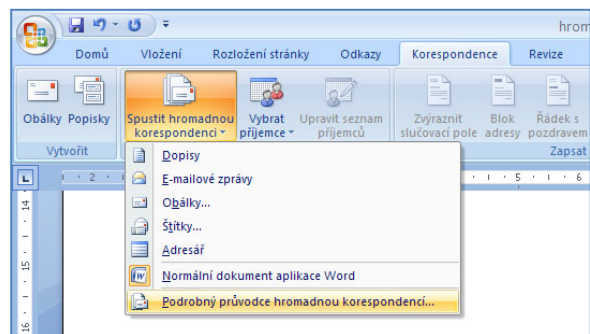
The mass correspondence inserts data from database into a letter with the same content for everyone (it is something like a scheme). The database is represented by a file where each row is used for one student and all data is separated by semicolons. Such a file can be acquired from the school information system where all participants are written.

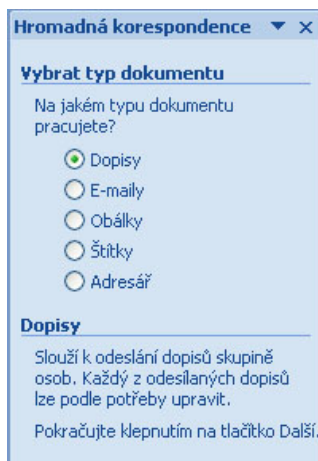
Practical Part:

Before we start working with the Mass correspondence, it is suitable to create the mentioned scheme. In our case we will use the prepared document “*seminar-ctvrty-rocnik-pozvanka-zadani-formatovane.doc*”. This is a simple document which will be used to explain the mass correspondence.

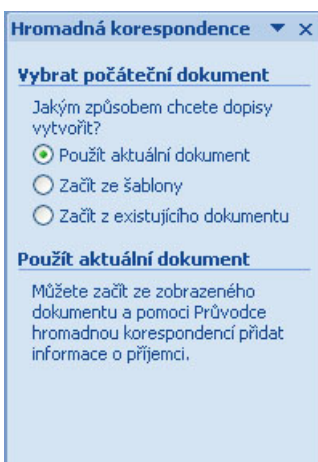
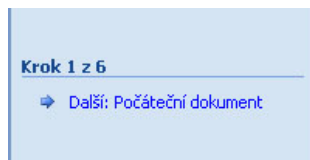
Open it now.

To work with the Mass correspondence you can use the bookmark Correspondence inside Microsoft Word. Here you can find several tools for this action. The first and the simplest tool is the button “Launch Mass Correspondence” where you can select the command “Advanced Guide of Mass Correspondence”.

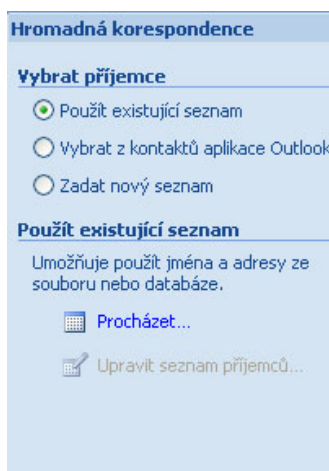
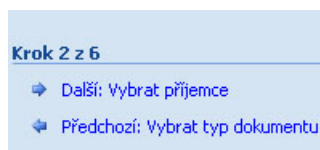




After the guide is launched you can see a panel inside the right part of program which will guide you through the whole process. You have to select the type of document. As you can see there are many options. The most classic variant is a letter and we will choose it. Choose the option and press “Next” button in the bottom part.



The following request deals with the data source for the Mass correspondence. We will use the first option because we previously opened our scheme document. You can also use predefined schemes for this purpose or create a new document. Continue by clicking on the “Next” button.

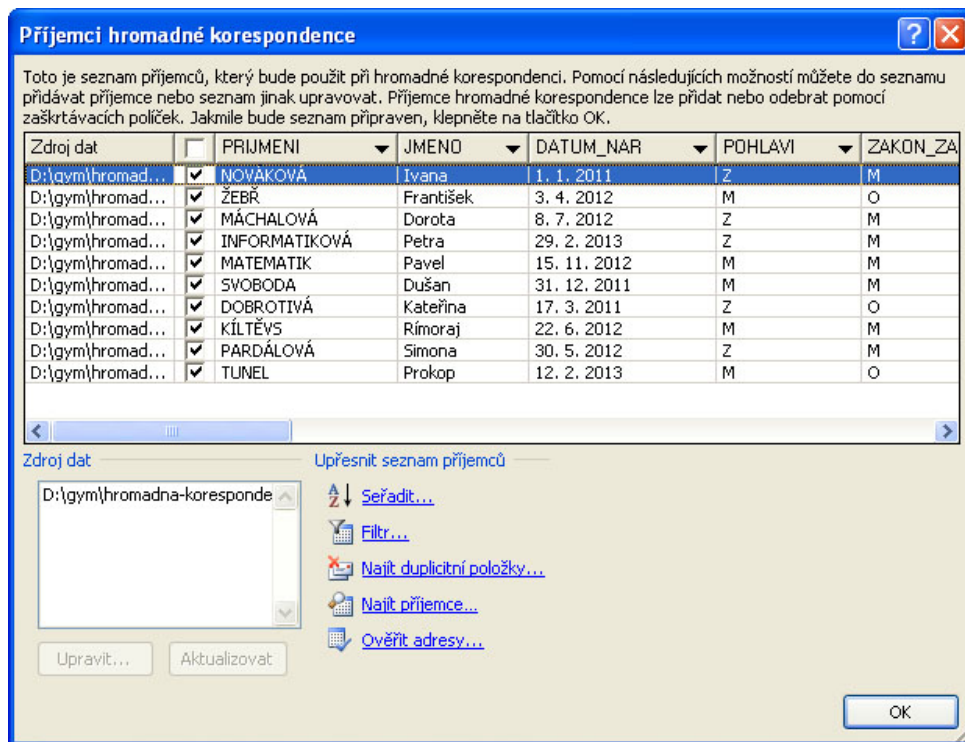


At this moment you will be prompted to select the database. You can select a database or contacts from Microsoft Outlook or select a text list. We will use the first option “Use existing list” and then click on the “Browse” button. A new dialogue window will open where we will choose the database file “*seminar-ctvrty-rocnik-pozvanka.csv*”. A new dialogue window “Recipients of mass correspondence” will open where you can work with the database.



After confirming the dialogue window we will continue as in the previous steps by clicking on the “Next” button.

Mass correspondence is prepared now. You have a letter (scheme) with attached database and you have to set it to behave properly. You also have details about the participant inside the letter but dynamic link to data is not operable now. These details are static now.



Vytvořit dopis

Vytvořte dopis (pokud jste to již neprovedli).

Chcete-li do dopisu přidat informace o příjemci, klepněte na místo v dopise a potom klepněte na jednu z níže uvedených položek.

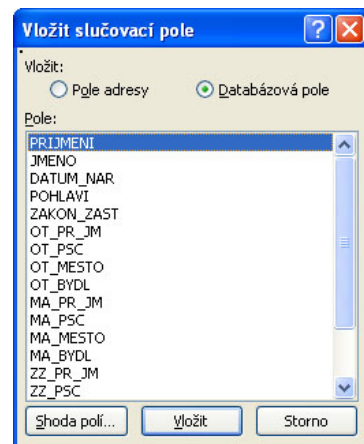
- Blok adresy...
- Řádek s pozdravem...
- Elektronické razítko...
- Další položky...

Po dokončení práce na dopisu klepněte tlačítko Další. Potom můžete zobrazit náhled a jednotlivé dopisy upravit.

You can see “Create Letter” in the header. In this case we are interested in the last item from the list – “More items...”. A new dialogue window “Insert Merging Field” will be opened after clicking on this option

Krok 4 z 6

- ➔ Další: Zobrazit náhled dopisů
- ➔ Předchozí: Vybrat příjemce



You have to know how to use this dialogue window. At first, before clicking on “Add items...” you should select the place inside your letter where you want to place the merging field. We will try the first name at first. Select the name Ivana in the letter and then click on “More fields...” and choose JMENO. After double clicking on that field, it will be inserted. Then the Cancel button will change to Close button. You can close the dialogue window. Repeat the whole procedure to insert all merging fields inside the letter. You can also insert fields without the guide using the correct button on the Correspondence toolbar.

Zobrazit náhled dopisů

Je zobrazen náhled jednoho ze sloučených dopisů. Chcete-li zobrazit náhled jiného dopisu, klepněte na jednu z následujících možností:



Najít příjemce...

Provést změny

Lze také změnit seznam příjemců:

Upravit seznam příjemců...

Vyloučit tohoto příjemce

Po dokončení zobrazení náhledu dopisů klepněte na tlačítko Další. Sloučené dopisy lze pak vytisknout nebo je upravit a přidat vlastní komentář.

Once you are finished continue by clicking on the button “Next” inside the bottom part of the guide. The header of the panel contains title “View previews of letters”. You can switch between single letters using left and right arrows and you will see the changes.

Krok 5 z 6

- ➔ Další: Dokončit hromadnou korespondenci
- ➔ Předchozí: Vytvořit dopis

Dokončit hromadnou korespondenci

Dopisy hromadné korespondence jsou připraveny.

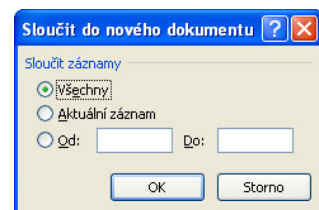
Chcete-li dopisy upravit, klepněte na odkaz Upravit jednotlivé dopisy. Tím otevřete nový dokument se sloučenými dopisy. Chcete-li změny provést ve všech dopisech, přepněte zpět do původního dokumentu.

Sloučit

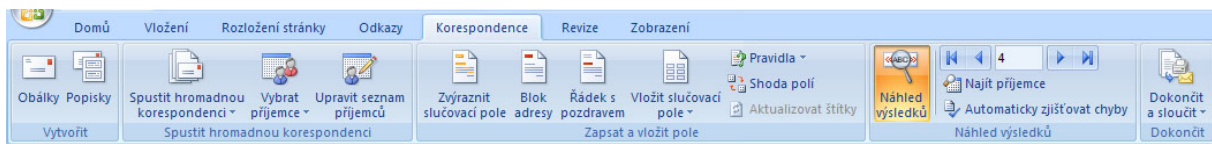
Task...

Upravit jednotlivé dopisy...

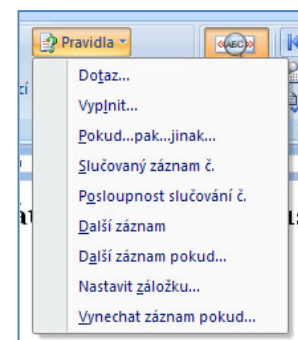
If everything is all right you can finish the mass correspondence. After clicking on the “Next” button you will get to the last part of the guide where you can merge all letters. Click on the item “Edit single letters” where you can choose which records should be merged. Select the first option “All”. You will get a new document with all letters together.



You can add additional changes using the panel Correspondence. You can see buttons like “Insert merging field”, “Preview or results” and next to these buttons you can switch between single participants. There is also the “Finish and merge” button and more.



We did not explain the way how to change the salutation of recipients. That means salutation like “Your daughter” or “Your son” and then the word “uchazeč” or “uchazečka” (participant). We will use so called rule for this. You can find a button “Rules” on the Correspondence panel. A list of commands will open after clicking on it where we should choose “If... then... else”.



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Ve Zlíně

Vložit pole Pokud: IF

KDYŽ

Název pole: POHLAVI Porovnání: Je rovno Porovnat s: M

Vložit tento text:
Vašeho syna

Jinak vložit tento text:
Vaši dceru

OK Storno

Zvu tímto Vaši dceru
Jméno a příjmení: Petra NOVÁKOVÁ č. j. 980

The correct procedure is to select the place (text) where the changes will be applied. Then click on “If... then... else” and choose the condition. Choose the Name of field as POHLAVI, select equals to and in the field compare with write letter M. There is a prepared section POHLAVI in the database where M means male and Ž means female. Then write the text for male participants in the first field and the text for female participants to the second one.

Pozvánka

Zvu tímto Vaši dceru
Jméno a příjmení: Pe
Datum narození: 1. 1.
dne 11. ledna 2010
gymnázia se sportovně
Časový harmonogram
Kmenový sport pla
7.30 - zahá

Vymout
Kopírovat
Vložit
Aktualizovat pole
Upravit pole...
Přepnout zobrazení polí
Písmo...
Odstavc...
Odrážky
Číslování

You can further edit the condition by selecting the text where it is placed (you can see that the background color is darker) and clicking on it using the right mouse button. Select the option “Switch display of fields”.

This will display the text in a special form which can be used to edit the condition as you want.

Zvu tímto { IF { MERGEFIELD POHLAVI } = "M" "Vašeho syna" "Vaši dceru" }
Jméno a příjmení: Pavel NOVÁKOVÁ č. j. 980
Datum narození: 1. 1. 2011