

Adding Mail Merge Fields to Your HTML Library Documents

Many of our WorkCenter users wish to type a special message and include mail merge field names in the footers of their letters or emails. This will allow you the ability to merge contact data into these footers and customize the message to meet your particular needs. This flash video will demonstrate the best method to accomplish this and ensure your contact data will merge using the field listing names.

We will be adding text to the Footer area inside our document. In order for WorkCenter to recognize the mail merge fields inside the Footers, we will need to add these to the body of the letter and then copy and paste them into the footer. The primary reason for this is Microsoft operating systems take over the formatting of the headers and footers with our mail merge fields. To demonstrate the procedures, let's open one of your library letters inside WorkCenter by clicking on the Library and edit a letter using these steps:

#1: For adding the text to the bottom of your document, right click on your desired letter and select "Edit Item". You will notice the letter will open and you will see the existing mail merge fields incorporated in the letter. Click on VIEW and select "Show Field Lists" from the drop down menu. You will see the "Field Listing" menu appear at the left of your WorkCenter screen. Open the heading you wish to use. For this example, we will be using the "My Custom Fields" since we have decided to add our address to the footer.

#2: Click and drag the mail merge field names into your letter. For our example, we will drag the My_StreetAddress, My_CSZ, My_Phone and My_Fax into the letter. This same procedure will work with any of the field listing mail merge names.

#3: In order for WorkCenter to now recognize and format these fields, we will need to save and close the letter. As you can see, the letter closed. We will now open the letter again using a right click and select "Edit Item" again. We are doing this so we can now cut and paste these activated mail merge fields into the footer of this document.

#4: You will see the field names you have added to this letter and they will have red marks around them. That will tell you that you have properly activated these fields. Highlight the line items and now you will need to use short-cut keystrokes to cut and paste these fields into your document footer. Once the line has been highlighted, hold down your "Ctrl" key and press the "X" key. You will notice the field names now disappear and will be ready to paste into the footer of this letter.

#5: Now you will need to paste this into your footer in your document. Open the letter again using a right click and select "Edit Item". Once the letter is open, click on VIEW and select the option "Manage Header and Footer". Once the Manage Header & Footer screen appears, you will need to click on "Add Footer" if that option is not already appearing. For this example, we will select "Footer all Pages". Now click on the "Footer all Pages" line located in the left side of the screen and you will notice the footer screen appear and you will see a cursor flashing.

#6: To paste the mail merge fields you have cut out of the letter, position the cursor in the proper spot and hold down your "Ctrl" key and press the "C" key to paste the fields into the letter. Save the edits by clicking on the "Close Button" and then click on FILE and SAVE. The letter will be saved and close.

#7: To test your footers for mail merging, select a contact record, click on the letter you just edited and then click on the printer icon. You can also just drag your contact on top of the letter or double click on the letter to open the document. We recommend that you now print the letter to make sure your edits are programmed correctly.

To learn more about WorkCenter, read the WorkCenter quick start reference guide, view the other flash videos and watch for the next upcoming WEBnR coaching and training sessions offered by vForms.