



[Mail Merge Tutorial](#)

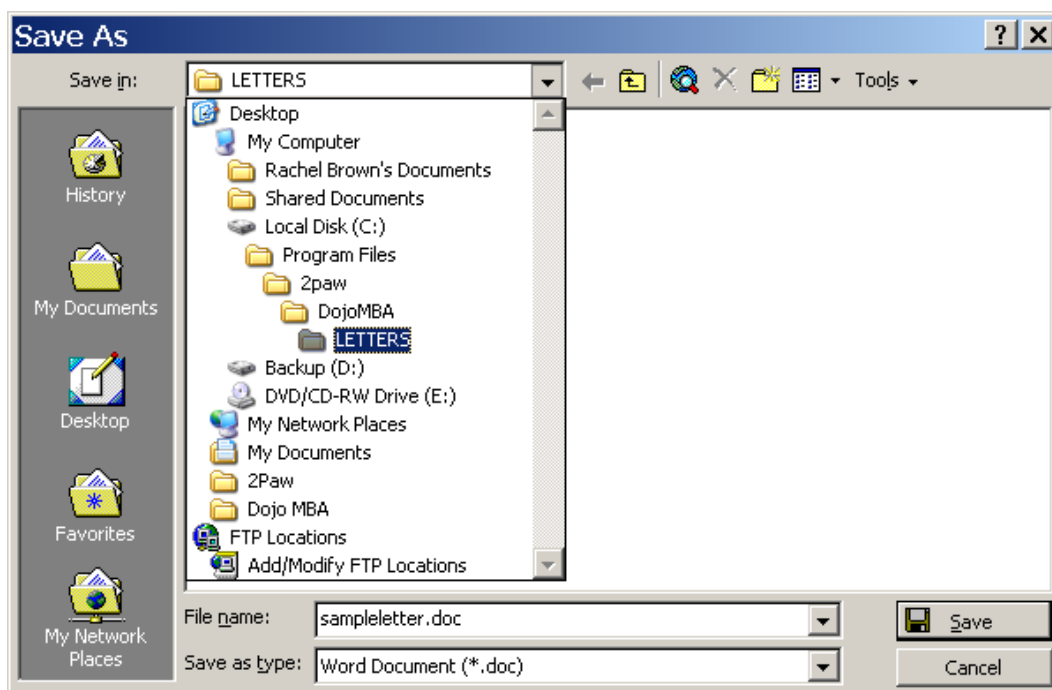
Create your own documents and easily merge contact information directly from Dojo MBA!

Introduction

The following information takes you through step-by-step instructions on how to create Mail Merge documents and how to merge contact information directly from Dojo MBA into a Word document to quickly create letters, certificates, lists and more.

Finding Your Folder

Dojo MBA, by default, stores your form letters in C:\Program Files\2paw\DojoMBA\LETTERS. Make sure the document you want to merge with is saved under this file.



**Hint – You can create a shortcut on your desktop to find this file more quickly by right clicking on the ‘letters’ file and clicking ‘create shortcut’.*

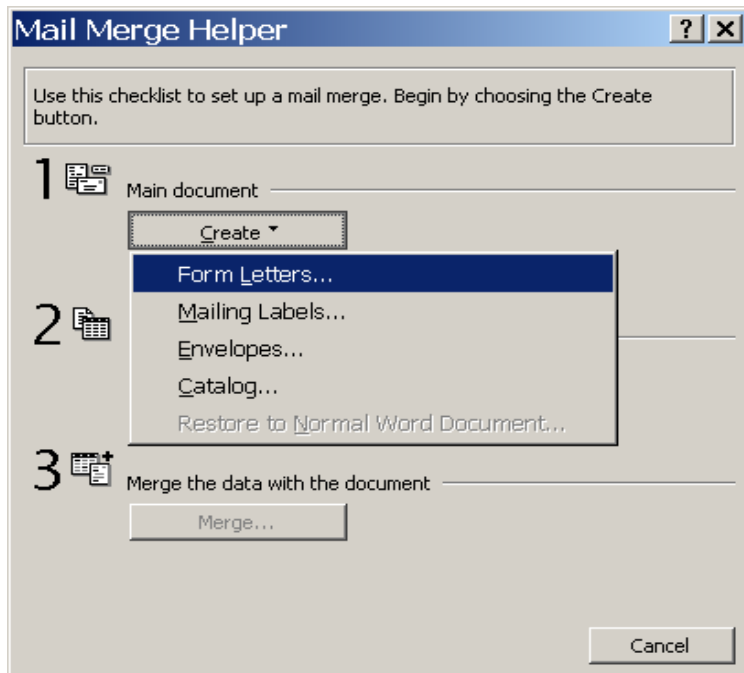
You will notice there are files already in the ‘LETTERS’ folder. These are general templates that Dojo MBA has provided which demonstrate how you can use merge documents. You may use these Word documents at your disposal and edit the information to fit your school’s needs.

We will assume you want to convert an existing document to make a form letter. In our next example, we will show you how to prepare your document using a form letter.

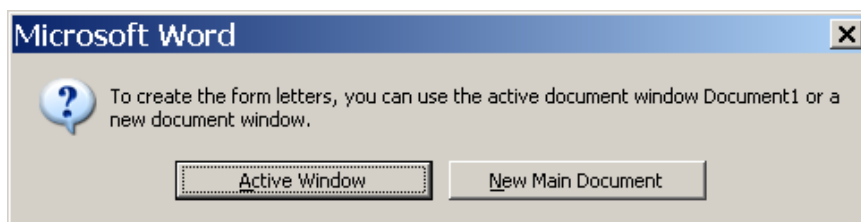
Creating a Mail Merge Document

1. PREPARING THE DOCUMENT

To start, you need to open the document that you want to use for a mail merge document. Once this is opened, click on 'Tools' and then find and click on 'Mail Merge'. This brings up the 'Mail Merge Helper' window, which you need to customize. First, click on 'Create' under Step 1 – Main document, and select the type of document you are using.

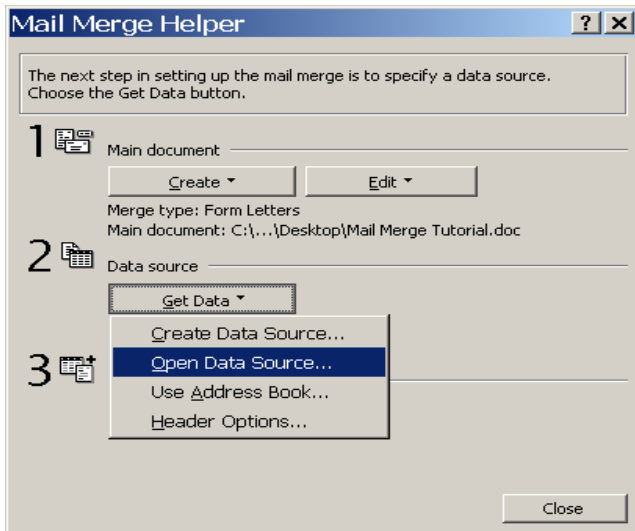


It will bring up the next screen:

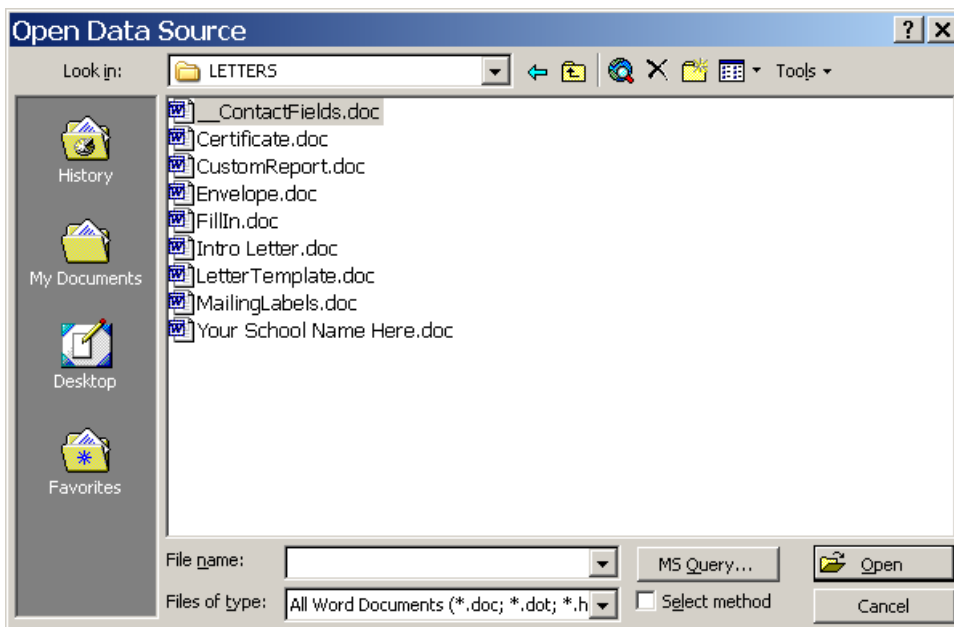


Click on 'Active Window'.

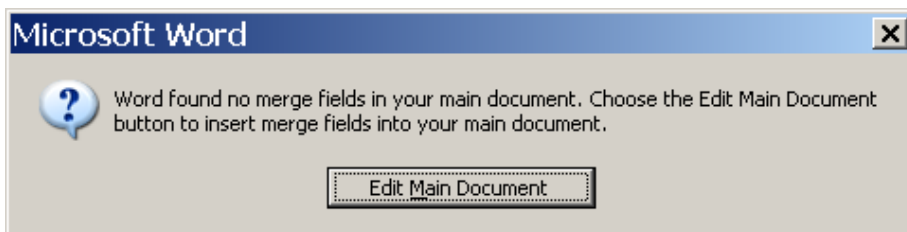
Next, click on 'Get Data' under Step 2 – Data Source. Select 'Open Data Source' on the drop down menu.



Proceed to finding your 'LETTERS' folder. When this is located, select the document '_ContactFields.doc'. This document is used as the Data Source and contains all available fields that are transferable from Dojo MBA (ie: FirstName, Address, etc).



It will bring up the next screen:

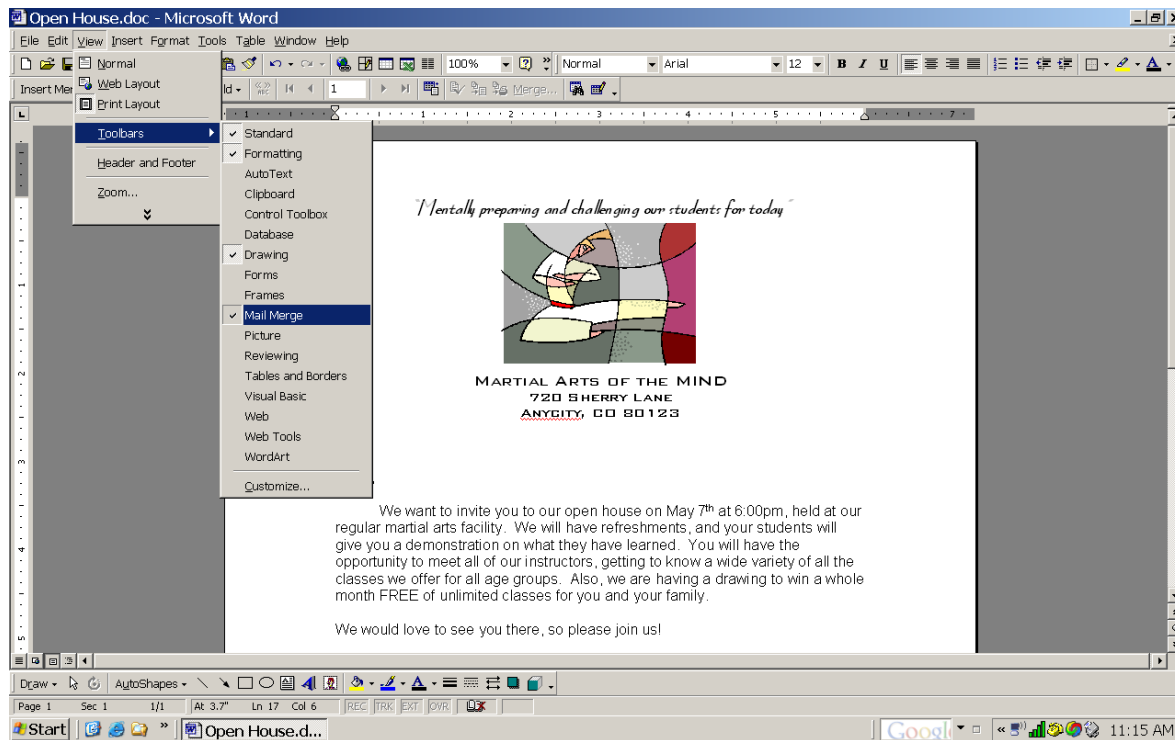


Click on 'Edit Main Document'.

This will bring you back to your main document, but now allow you to insert the necessary fields to prepare your Mail Merge document. These fields are located under the 'Insert Merge Field' option, and should be located on your upper left toolbar.

If you cannot see the 'Insert Merge Field' option, double-check your View by:

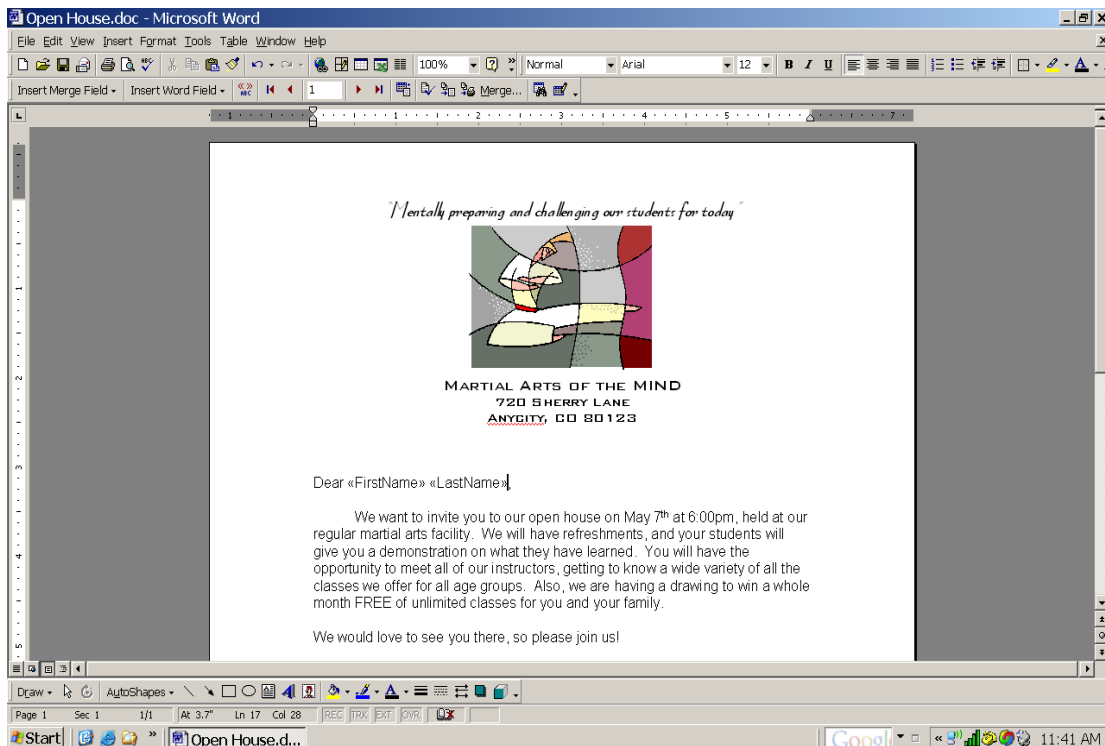
- ❑ Click on 'View' on your main Toolbar
- ❑ Scroll down and click on 'Toolbars'
- ❑ Make sure 'Mail Merge' is selected.



If this still does not bring up the 'Insert Merge Field', right click on the 'Insert Word Field' then scroll down and click 'Customize'. Make sure all the correct boxes are selected to see the full Mail Merge taskbar.

The 'Insert Merge Field' contains many fields that will be a placeholder for the appropriate information from selected students (which you will select later) in Dojo MBA. To insert a field, place the cursor where you want the field to be placed. Click on 'Insert Merge Field' and select the appropriate field. It will automatically be placed into the document. You will be able to tell what is a 'Merge Field' by the <<FirstName>> around the field.

*Hint - You will also see an option next to 'Insert Merge Field' that says 'Insert Word Field'. This option allows you to include additional information in the resulting merge documents and control how Word merges the data. To find out more information on how each Word Field option works, run a search under the 'Help' section on your Word document and type in 'Word fields for use in mail merge'.



*Hint – You can also press **Alt F9** to see the codes more clearly. When doing this, your fields will look like this: { MERGEFIELD FirstName }. Look at Word help for more information on this topic.

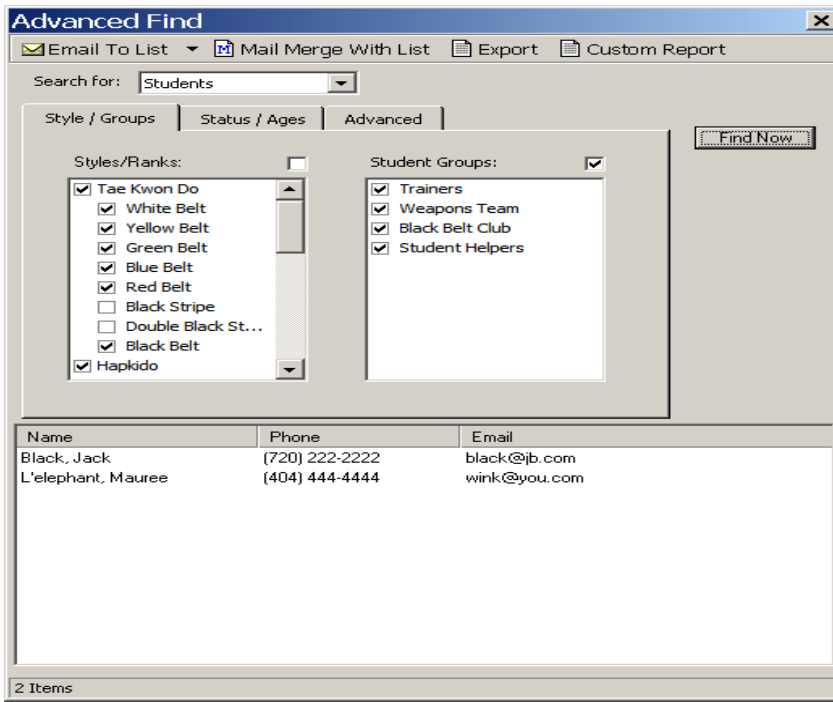
Once you have inserted all of the appropriate Merge Fields, save your document under the ‘LETTERS’ folder.

Next we will go over how to merge your contacts into a prepared Word document to finalize the Mail Merge process.

Merging Contacts into a Completed Document

1. SELECT YOUR CONTACTS

In Dojo MBA, you can do Mail Merge from several places, such as the student window, the Mail Room, or clicking directly on ‘Advanced Find’. In this example, we show ‘Advanced Find’. Click on ‘Advanced Find’ up at the top on the main toolbar. This will bring up a box where you can specifically select which group of students you want to include in your mail merge document. After choosing your selection, click the ‘Find Now’ button on the right.



This will bring up a list of the selected contacts. Then you are ready to merge your contacts into a document.

2. MERGING CONTACTS INTO A DOCUMENT

Click on 'Mail Merge With List' on the toolbar at the top of your 'Advanced Find' box. This will bring up a box to locate and select your document. You may need to search for it depending on where you have saved your document. Double click on the desired document. It will then ask, "Would you like to add a note to each recipient for this action?" allowing you to automatically and quickly make a note in every selected students file. Make your selection, and then hit 'Continue'. It will let you know that it may take a few moments to generate. Press 'OK'. This will open up the document, and merge the selected contacts into the designated fields. This will complete your mail merge process.

