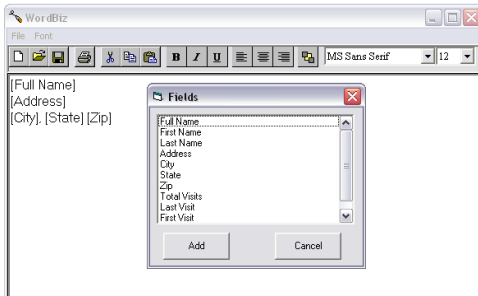


wordbiz & mail merge

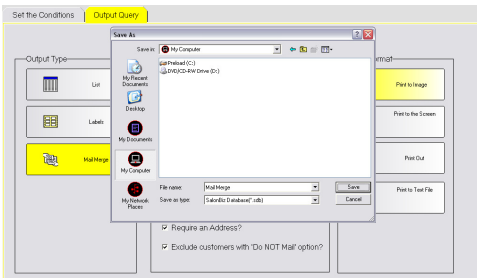
Create and mail documents for your customers through the system.



WordBiz

1. From the SalonBiz®/SpaBiz® menu bar, click on the Communications icon (Envelope).
2. Click on the WordBiz button.
3. Click on the Fields button. It is the button to the left of the font type showing three little boxes.
4. To make a heading for your letter, select by clicking once on Full Name for the first field. Click the Add button.
5. Press the Enter key on your keyboard to go to the next line in the document.
6. Click on the Fields button.
7. Select the Address field. Click the Add button to add the address field to the document.
8. Press the Enter key on your keyboard to go to the next line in the document.
9. Click on the Fields button.
10. Select the City field. Click the Add button to add the city field to the document.
11. Type a comma and a space after "City" in the document.
12. Click on the Fields button.
13. Select the State field. Click the Add button to add the state field to the document.
14. Type a space after "State" in the document.
15. Click on the Fields button.
16. Select the Zip field. Click the Add button to add the zip field to the document.
17. Press the Enter key on your keyboard 5 times and begin the text. For Example: Type in "Dear" and then a space and then click on the Fields button and select the "First Name" field. Click the Add button to add the first name field to the document.
18. Type a comma after "First Name" and press the Enter key on the keyboard and type in the body of the text.
19. To save the document, click on File on the top left of the WordBiz window.
20. Select Save As and select where you will save the document.
21. Click on the Save button. You will now be able to do a mail merge with this document from a customer query.





Mail Merge

1. From the SalonBiz®/SpaBiz® menu bar, click on the Communications icon (Envelope).
2. Click on the Queries button.
3. Create the customer query that you would like to merge with the WordBiz document.
 - This is done by clicking on the add button and naming the query.
 - Click on the set the conditions tab.
 - Add all statements for the query into the query conditions box.
4. Click the Output Query tab.
5. Make sure the questions “Require an address?” and “Exclude customers with do not mail option?” are checked.
6. Click the Mail Merge button.
7. Click the Print to Image button.
8. Answer Yes to the message will pop up “There are ___ customers in your query. Do you wish to continue to print?”
9. A window will then pop up to save the customer query. Name and save the query.
10. A window will pop up to show the location of the saved document.
11. Click OK.
12. Answer Yes to the message “Would you like to run Word Biz now?”
13. The wordbiz window will open. Go to File, then Open.
14. Answer Yes to the message “Is your file using Mail Merge?”
15. Select the saved document and click Open.
16. Click on the Print button.
17. A window will pop up “Please select a location of the mail merge file.” Click OK.
18. Next select the name of the saved customer query, and click Open.
19. All pages for this document will then be sent to the printer.

