

CONNX 9.0 Quick Reference Card

Using Mail Merge in Microsoft Word XP with CONNX data sources

If you've been wondering how to merge data from CONNX data sources using the Mail Merge function in Microsoft Word XP. here's how:

1. Open both Microsoft Word XP and CONNX. In CONNX, select the samples. cdd in the File/ Open dialog box. Under Tools/Options, select the Quoted Delimiter and Enable CONNX Database Catalog Support check boxes. Click the OK button, and be sure to save the CDD you created.



5. Log on using your integrated CONNX logon, select an ODBC DSN database type in the Application list box, and then click the OK button. Select the database that contains the data you intend to use, and then click the Next button.

RMS

Name

• 2

customers_rms

equipment rms

ill orders_rms

I products_rms

III syscnxColumns

- 2. In Microsoft Word XP, under Tools, select Letters and Mailings/ Mail Merge Wizard. Click Next: Starting Document at the bottom of the Mail Merge pane on the right.
 - 3. Next, you'll be choosing a source for the address block of a mass mailing from a CONNX RMS data source, but you can use any available data source. In the next pane, click Next: Select Recipients. When the pane changes, click the Browse button and then click New Source.
 - 4. You can now locate an ODBC Data Source Name (DSN). In this case, we are using the CONNX8Samples32 CDD. Click ODBC DSN, and then click the Next button. Click CONNX8Samples 32, and click Next.



©CONNX Solutions, Inc., 2004. All rights reserved. Microsoft Word XP is a registered trademarks of Microsoft Corporation in the United States and/or other countries.

CONNX Solutions. Inc., 2039 152nd Avenue NE Redmond, WA 98052 www.connx.com 425/519-6600 fax: 425/519-6601 1-888-88CONNX

Using Mail Merge in Microsoft Word XP with CONNX data sources Page Two

6. Select a database table, one at a time. At this point, you can rename the file or add a description. Click the Finish button.

Data Connection Wizard - Finish	? ×
Save Data Connection File and Finish Enter a name and description for your new Data Connection file, and press Finish to save.	
File Name:	
RMS customers_rms.odc Browse	
Save password in file	
Description:	
(To help others understand what your data connection points to)	Select Data Source
Search Keywords:	Look in:
	History
Cancel < Back Next > Einis	My Documents

 Choose the data source you created (it will have the extension .odc), and then click the Open button.



8. The Data Link Properties dialog box opens. On the Connection tab, enter your CONNX user name and password. Make sure the checkbox for Allow Saving Password is selected. Click the OK button.

🖳 Data Link Properties 🛛 🗙 🗙
Provider Connection Advanced All
Specify the following to connect to DDBC data: 1. Specify the source of data: C Use <u>data</u> source name <u>Refresh</u>
Use cgnnection string Connection string: DSN=CONNX8SAMPLES32,UID=infomautuse Build 2. Enter information to log on to the server User name Information to log on to the server
Password: Password: Blank password: Blank password: Allow gaving password
BMS
OK Cancel Help

9. Back in Word XP, select Mail Merge Recipients. Click the Select All button or another selection of recipients of your letter. Click the OK button.

Mail Merge Recipients ? X To sort the list, click the appropriate column heading. To narrow down the recipients displayed by a specific criteria, such as by city, click the arrow next to the column heading. Use the check boxes or buttons to add or remove recipients from the mail merge. List of recipients:					
_	customerid	customername	customeraddress	 customercity 	
	ALWAO	Always Open Quick	77 Overpass Ave.	Provo	
	ANDRC	Andre's Continental	P.O. Box 209	Bellingham —	
	ANTHB	Anthony's Beer and	33 Neptune Circle	Clifton Forge	
	BABUJ	Babu Ji's Exports	Box 29938	London	
	BERGS	Bergstad's Scandina	41 S. Marlon St.	Seattle	
	BLUEL	Blue Lake Deli & Gro	210 Main St.	Port Townsend	
	BLUMG	Blum's Goods	143 Blum Rd.	London	
	BOTTM	Bottom-Dollar Mark	23 Tsawassen Blvd.	Tsawassen	
	BSBEV	B's Beverages	Fauntleroy Circus	London	
	Bubba				
	CONSH	Consolidated Holdin	12 Berkeley Gardens	London	
	FASTC	Eastern Connection	35 Kina George	London	
<u></u>	elect All Clear	All <u>R</u> efresh		ОК	

Page Three Mail Merge in Windows XP

- 10. Click Next:Write Your Letter. Compose your letter and click File/Save.
- 11. Once your letter is complete, click Address Block in the Mail Merge pane and select the Match Fields button. Select the fields from the list boxes that you want to appear in the address block, and then click the OK button.

State Customerzip Postal Code customercountry Spouse First Name Image: Customercountry Optional information Image: Customercountry Middle Name Image: Customercountry Suffix Image: Customercountry Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)	Match Fields Mail Merge has special features for easily working with address field components to simplify address insertion. Required information Last Name First Name Courtesy Title Company Address 1 City State Postal Code Spouse First Name Optional information Middle Name Suffix Use the drop-down lists to choose the field from your datat address information Mail Merge expects (listed on the left.)	resses. Please specify address	Preview your letters One of the merged letters is previewed here. To preview another letter, click one of the following: Recipient: 1 Find a recipient Find a recipient Find a recipient Edit recipient list Exclude this recipient list Exclude this recipient Then you can print the merged letters to add personal comments.
---	---	--------------------------------	--

12. Click Complete the Merge and preview your letters under the Preview pane. Click Find a Recipient and move through the merged mail by using the arrow keys. You can edit the text of each address by selecting the label in each letter typing the corrections. Click File/Save once you've reviewed your labels.

📴 Document1 - Microsoft Word	_ 8 ×
Eile Edit View Insert Format Iools Table Window Help	Type a question for help 🛛 🗸
□ 🕞 🔐 🐥 Normal 🔹 Times New Roman 🔹 12 🔹 B I 🕎 💽 喜 🚍 🗮 ‡≣ ▾	ЕЕ∉∉∣⊡∙ℤ∙ሏ∙.
L	Ф ♦ Mail Merge ▼ ×
	Complete the merge Mail Merge is ready to produce your letters.
August 29, 2002 Always Open Quick Mart 77 Overpass Ave. Provo, UT 84604	To personalize your letters, click "Edit Individual Letters." This will open a new document with your merged letters. To make changes to all the letters, switch back to the original document.
Dear Sir or Madame:	Merge \$ Print \$ Edit individual letters
Inank you very much for your interest in our product. We will be looking forwarc hearing from you in the near future. Sincerely,	
X. P. <u>Wordington</u> CONNX Solutions, Inc.	
▼ ↓ ↓ ■ G G 3 3 4	Step 6 of 6
Page 1 Sec 1 1/1 At 2.3" Ln 8 Col 6 REC TRK EXT OVR	
😹 Start 🛛 🖉 😹 🖸 🛛 🗐 Document 1 - Microsof 🚔 samples.cdd - CONNX Dat	🕮 🅀 🔞 🛛 11:19 AM

13. Click Print to open the Word XP Print pane and select a printer. You can also choose Edit Individual Letters which opens a file containing the letter you select in the Merge in New Document dialog box. To return to the Mail Merge function, click Microsoft Word on the task bar.

Next: Complete the merge

Previous: Write your letter

Merge to New Document 🛛 🔋 🗙
Merge records
• Al
C Curr <u>e</u> nt record
C Erom: To:
OK Cancel