

CONNX 8.9 QUICK REFERENCE CARD

Using Microsoft Word Mail Merge to Create Mailing Lists Using CONNX Data Sources

If you have Microsoft Word, you can create mailing lists using the information you have stored in CONNX data sources, including tables and views from any of the list of CONNX-compatible database types.

To create a mailing list using Microsoft Word and CONNX

- 1. Open a new document in Microsoft Word. (We used Microsoft Word 2000.) This document can be saved and used as a template for future mailing lists. Select **Mail Merge** on the **Tools** menu.
- 2. Select **Create** under **Main Document** in the **Mail Merge Helper** dialog box. Select **Mailing Labels**, and then click **New Main Document**.
- 3. Click the **Get Data** button under **Data Source** in the **Mail Merge Helper** dialog box, and then click the **Open Data Source** button.

Mail Merg	e Helper	? ×			
The next step in setting up the mail merge is to specify a data source. Choose the Get Data button.					
1 ==	Main document				
	<u>C</u> reate ▼ Setup Merge type: Mailing Labels Main document: Document3				
2 🖻	Data source	Open Data Source button			
	<u>C</u> reate Data Source				
3間	Open Data Source Use Address Book Header Options				
		Cancel			

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4. The **Open Data Source** window appears. Click the **MS Query** button. (In Microsoft Word 97, the MS Query button is on the right side of the window.)

Open Data Sou	се				? ×
Look <u>i</u> n:	🛃 Desktop		- 🗢 💼 🔍	🕽 🗙 📥 🎫 - Tools	; -
History History My Documents Desktop	의 My Computer	iborhood		MS Query button]
	File name:			V	
				Uery	Upen
	Files of type: A	Word Documents (*.do	ic; *.dot; *.ht	Select method	Cancel

5. Select a data source in the **Choose Data Source** dialog box, and then click the **OK** button.

Choose Data Source	? ×
Databases Queries	OK
<new data="" source=""></new>	Cancel
CONNX8SAMPLES32*	Browse
CRINF* CBNR7*	Options
CRSS* CRSYB*	<u>D</u> elete
Image: Construction Image: Construction Image: Construction Image: Construction Image: Construction Image: Construction Image: Construction Image: Construction	

6. Log into CONNX using your CONNX user name and password, and then click the **OK** button.

CONNX Integra	ted Logon		×
User ID: Password:	NickD ******	<u>C</u> hange	OK Cancel
Connect Options Application: Data Dictionary:	Custom)	SAMPLES.CD	<u>C</u> ustom

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 Select a table in the Query Wizard – Choose Columns dialog box. Click the Expand (+) button to view the list of available columns (fields). Select the columns you want to include in your mailing list, and then click the Add (>) button to add the columns to your query.

Query Wizard - Choose Columns		×
What columns of data do you want to include in Available tables and columns: customers_rms customerid customeraddress customercity customerstate customerzip customercountru Preview of data in selected column:	Add button	
Preview Now Options	< <u>B</u> ack <u>N</u> ext > Cancel	

 Click the Next buttons in the Query Wizard – Filter Data and Query Wizard – Sort Order dialog boxes. You may want to sort by Zip Code if you are preparing a bulk mailing. To do so, click the down arrow in the Sort By list box, and then select customerzip from the list.

Query Wizard - Filter Data	3	×	
Filter the data to specify whit If you don't want to filter the <u>C</u> olumn to filter: <u>Customeraddress</u> customeraddress customerate customerate customerate customerate	ch rows to include in your query. data, click Next. Only include rows where: C And C Or And C Or And C Or	Query Wizard - Sort Order Specify how you want your data sorted. If you don't want to sort the data, click Next. Sort by Then by Then by	Ascending Oescending Oescending Oescending Oescending OAscending OAscending
2	< <u>B</u> ack <u>N</u> ext >		C Descending
			Back Next > Cancel

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9. Select Return Data to Microsoft Word, and then click the Finish button in the Query Wizard – Finish dialog box.



10. Click the Set Up Main Document button.

Microsoft Word	×
Word needs to set of button to finish sett	up your main document. Choose the Set Up Main Document ing up your main document.
Į.	Set Up Main Document

11. Select the printer type, label type, and label size in the **Label Options** dialog box. You can select from a wide range of options.



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12. Click the **Insert Merge Field** button in the **Create Labels** dialog box. The fields you select appear in the text box. Insert paragraph returns, commas, and spaces as you would like them to appear on your labels.

Crea	te Labels			? ×
Chi sar Sar	oose the Insert Merge Field nple label. You can edit and mple Label box.	button d forma	to insert merge f t the merge fields	ields into the and text in the
	In <u>s</u> ert Merge Field 🔻		Insert Postal <u>B</u>	ar Code
Sam	customername customeraddress customercity customerstate customerzip customercountry			▲
			ОК	Cancel

13. Click the Merge button in the Mail Merge Helper dialog box.

Mail Merge Helper 🛛 😤 🗙				
The main button to	document and data source are ready to merge. Choose the Merge complete the merge.			
	Main document			
	<u>C</u> reate ▼ <u>E</u> dit ▼			
	Merge type: Mailing Labels			
) 🖓	Main document: Document3			
Z 🕮	Data source			
	<u>G</u> et Data ▼ E <u>d</u> it ▼			
	Data: CONNX8SAMPLES32.customers_rms			
3 ঊ	Merge the data with the document			
	Merge Query Options			
	Options in effect: Suppress Blank Lines in Addresses Query Options have been set			
	Merge to new document Close			

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14. Select **New Document** in the **Merge To:** text box. Select the number of records to merge, and then choose whether blank lines should be used to replace empty fields. Click the **Merge** button.



15. Your document is complete and ready to print.

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<u> </u>	Insert Format Tools Table Window Help			
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· · ·	Always Open Quick Mart 77 Overpass Ave. Provo, wa 84604 USA	Andre's Continental Food Market P.O. Box 209 Bellingham, WA 98226 USA	Anthony's Beer and Ale 33 Neptune Circle Clifton Forge, WA 24422 USA	
	Babu Ji's Exports Box 29938 London, WX1 5LT UK	Bergstad's Scandinavian Grocery 41 S. Marlon St. Seattle, WA 98104 USA	Blue Lake Deli & Grocery 210 Main St. Port Townsend, WA 98368 USA	
	Blum's Goods 143 Blum Rd. London, NW1 2BP UK	Bottom-Dollar Markets 23 Tsawassen Blvd. Tsawassen, BC T2F 8M4 Canada	B's Beverages Fauntleroy Circus London, EC2 5NT UK	
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- - - 4	Fitzgerald's Deli and Video 14 E. Eastway Dr. Bellevue. WA	Foodmongers, Inc. 418 - 6th Ave. Walla Walla. WA	Fraser Distributors North Kingsgate London.	