Adjutant Software Customer Support
Tech Notes

Document Title: Creating Mail Merge documents in MS Word using Campaign ToolBox
Document Number: 016
Applies to: Campaign ToolBox


SUMMARY

Campaign ToolBox creates a database file, based on your specifications, that is designed to be used with the mail merge function of Microsoft Word. This document provides instructions on how to create a mail merge letter using Microsoft Word 2000. Other versions of Word may be somewhat different.
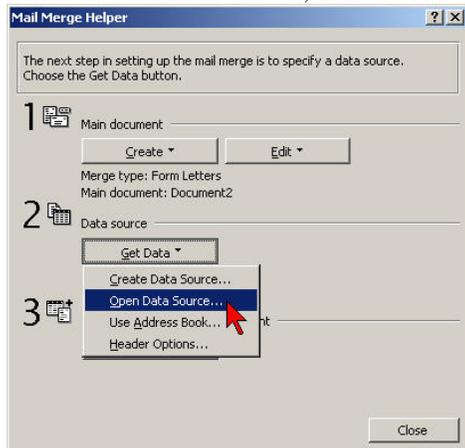
PROCEDURE

In Campaign ToolBox, refer to the Quick Reference Guide or the on-line help files to create the mail merge database file. This mail merge database file is saved in your main program folder and is named "MailMergeData.mdb". Your MS Word document will need to point to that file.

To Create an New document (letter or labels)
1. From the Tools menu item, select "Mail Merge" and the Mail Merge Helper will appear.
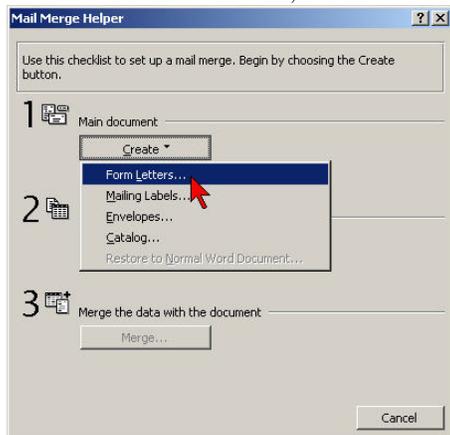

2. Click the "Create" button and select either Form Letters or Mailing Labels. (the rest of this Tech Note will assume that you are creating a Form Letter).
3. Select Active Window when prompted.
4. Click the "Get Data" button, then select "Open Data Source"

5. When the file browser box appears, find the "Files of type" drop-down list at the bottom. Change the list to "MS Access Databases (*.mdb, *.mde)". If this option does not appear in the list, it means that it was not included when Word was installed (the "Typical" installation includes this, but it can be manually excluded when someone is trying to conserve hard drive space). You will need to install this driver from the Word CD; note that Adjutant Software tech support does not include help with installing Word.
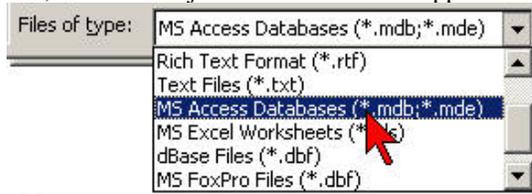

6. Browse through your system to locate the file "MailMergeData.mdb". This will be in your main Campaign ToolBox folder, which is typically C:\Program files\CTBxx (where xx is your state abbreviation). Click on the file to select it.

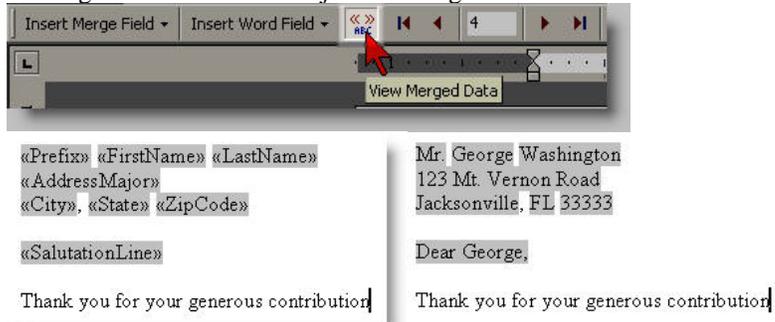7. A box will appear that has two tabs labeled "Tables" and "Queries". Make no changes, just click OK.
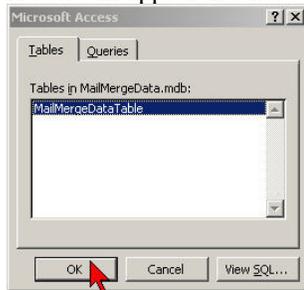
8. At this point, you will be taken back to the main document. To add a merge field, click the "Insert Merge Field" list at the upper left part of your toolbar to select the field that you want to insert into the document.
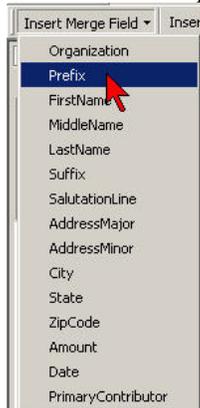
9. Continue creating your document by inserting merge fields and typing your text. Clicking on the <<ABC>> button will display the actual data rather than the field names. You can scroll through the records by clicking on the scroll buttons just to the right of the <<ABC>> button.

«Prefix» «FirstName» «LastName»
«AddressMajor»
«City», «State» «ZipCode»

«SalutationLine»

Thank you for your generous contribution

Mr. George Washington
123 Mt. Vernon Road
Jacksonville, FL 33333

Dear George,

Thank you for your generous contribution

10. Save the document when you are finished, but before merging. This will let you re-use the document later.
11. To create the final merge document, click on "Merge" on the toolbar and select "New document"
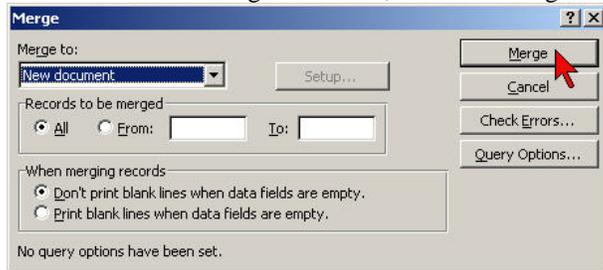
12. To specify the sort order, click on the "Query Options" button.
13. Clicking the "Merge" button will create a new mail merge document from the fields and text you just finished entering.

NOTES

1. Once you have created and saved your mail merge document (step 10), it can be used for future documents. Simply create a new database using Campaign ToolBox, then open the document. It will already be linked to the database file, and you're ready to merge and print.
2. Other word processor programs should also be able to create mail merge documents using the database file, but they have not been tested.

Adjutant Software Tech Support does NOT include help with using your word processor. Please consult the on-line help for your word processor for further information.