

## Use of GenX2005 Merge Module with Word® 97

Professional Document Systems has made available a Merge Module for use with Microsoft Word® products. This feature can be used to create forms as simple or complex as you desire. We cannot hope to address everyone's needs, so we will just go over the basics here. If you have any questions, feel free to contact us and we'll try to help.

Click on "Word Merge" under Tools on the menu bar.

The list on the left holds all your files. Highlight a file in the left-hand list that you want to merge with Word and click the topmost button with the ">" on it. If you want to merge all your files with Word, click the button with the ">>" on it. This will put all your files in the list on the right. To remove a single file, highlight a file in the right-hand list and click the button with the "<" on it. To remove all files, click the button with the "<<" on it.

When you are finished adding files to the "Selected" list, click the "Continue" button. GenX2005 automatically creates a database containing some of the pertinent data from each of the files you selected. It then places it on your C: drive in a folder it creates called "GenXMerge". Within that folder, the software creates an Access database called "GenXMerge.mdb". Within that database is a table called "Letters". Select this table for a data file when you create a mail merge document in your word processing software.

As an example, if you were using **Word® 97**, you would start Word®, go to "Tools", then "Mail Merge".

In the window that appears, you would click the "Create €" button that is located under 1 - "Main document". Then click on "Form Letters...", and "New Main Document".

Under 2 - "Data source" click the "Get Data €" button. Then click on "Open Data Source...". At this time a window labeled "Open Data Source" will appear. You need to navigate to your C: drive and find the GenXMerge directory. When you have selected that directory, click on the dropdown arrow (€) next to "Files of type" and choose "MS Access Databases (\*.mdb)", or something to that effect. The point here is to select MS Access as the data source if prompted and then click OK. You should see "GenXMerge.mdb" appear on your screen. When it does, click on "Open".

You should now end up at a window labeled "Select Table" or "Microsoft Access". Select the table "Letters" if it is not already highlighted. Click OK.

At this juncture, you will be prompted to insert merge fields into the new document. Because this document is being newly created, you will also have to type in the desired text. Begin doing this by clicking "Edit Main Document". You may now enter your text and set up the document so it will insert the proper information from the selected files. Insert your cursor into the locations where you need file information and select "Insert Merge Field" A list of available fields will appear. Select the proper field and the corresponding file information for that field will be inserted. You can switch back in forth between the field name and specific file values for that field by clicking on the  $\begin{matrix} << >> \\ A & B & C \end{matrix}$  button on the Mail Merge toolbar .

If you wish to change the formatting for any particular field, just click anywhere in the document and key ALT + F9 at the same time. Format the fields as you desire and type ALT + F9 again to get out of the formatting mode. (If you have questions on this procedure, go to help and look up "format merged data".)

Save the letter as a “Document Template” in the folder of your choice. Just select your recipients and print them out whenever you’re ready.

Phew! But don’t be discouraged... we won’t have to do this every time we need to print a document. You will, however, have to do this once for each new document. The system will automatically remember where the data source is, and update it when you select different files in GenX2005.

**Please Note:**

When selecting fields for the merge, the following are the representative values for the fields selected. If you simply select “Type of Property”, for example, and place it on your document a “1” will appear if it’s a single property, a “2” if it’s multi-family, etc.. This is probably not what you want.

In order to have your document print out “Single Family”, etc., you will need to instead click the “Insert Word Field€” button. Then choose the “If...then...else” option from the pull down menu.

Using this example, you would select “Type\_of\_Property” in the drop down under “Field name”. You would leave “equal to” in the “comparison” section and put a “1” under “compare to”. Where it says “Insert this text”, you would type in “Single Family”. Now every time a “1” appears in the “Type of Property” field, it will print out “Single Family” instead. This procedure would have to be followed for each designation under “Type\_of\_Property”.

<u>Type of Property</u>	<u>Type of Buyer/Seller</u>
1 = Single Family	1 = Individuals
2 = Multi-Family	2 = Corporation
3 = Condominium	3 = Estate
4 = Planned Unit	4 = Trust
	5 = Partnership
	6 = Other

**Viewing a Sample Merge File:**

To view a sample merge file, follow the procedure “Create A Merge File” in GenX. Then open your Word® application (we’ll stick with our Word® 97 example), go to “File”, and click “Open”. In the “Open” window that appears, you should browse your C: drive to the “GenXMerge” folder. Click on the “Homestead Example.doc”.

By toggling back and forth between with (ALT + F9) and  $\llcorner\llcorner\llcorner$  you can see how we’ve formatted currency, dates, phone numbers and connective symbols.

**Using the Word® Merge Document You’ve Created:**

When you want to open a merge document you’ve created, first go to “Create A Merge File” in GenX and enter your file numbers.

Open the Word® document and click on the “Merge to Printer” icon on the Mail Merge toolbar. Click “OK” on the print dialog box that appears. Your documents will print out. Good luck!