

POMA Technique WORD Mail Merge Interface

Introduction

The purpose of this POMA Technique is to describe the manner in which you can interface POMA with the Microsoft Word Mail Merge capability.

The names and addresses that are merged into a Microsoft Word document are always the ones from the most recent POMA label run. If you print labels for those individuals without email addresses, then those are the only ones that appear in the labels and the only ones that will be able to be merged with a Word document.

This technique has an accompanied sample Word document which is used in the example technique below. The Word document has the following file name;

“Sample Mail Merge Letter.doc”.

The example uses POMA Version 4.00 Build 01b or higher and Microsoft Word 2002 or MS Office 2003.

Available Data from POMA

The Microsoft Word process described below uses data that is generated every time you run labels in POMA. That is, whatever names and addresses were on the last set of labels you ran in POMA is the data that is available to do the mail merge within MS Word.

You will be able to automatically generate individual letters to each of the names in the label run where their address and greeting line (if desired) appears on their individualized letter.

When POMA generates labels, it simultaneously outputs a Microsoft Excel spreadsheet that contains the label information. This file is always placed on the C: hard drive of the individual's PC that is generating the labels, even if you are running in a server environment. The location of the generated Excel spreadsheet is:

C:/POMA/Export/POMA Label List.xls

This is the location where Microsoft Word will retrieve its mail merge data.

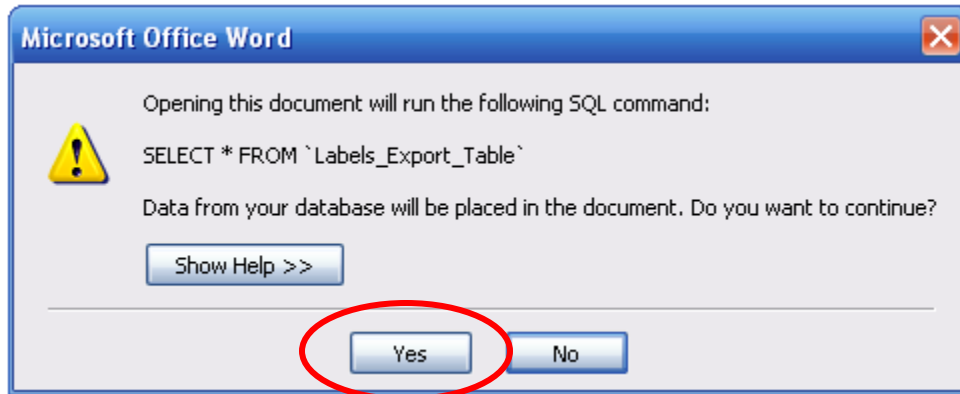
The following describes one method for doing mail merge using an existing document and, hopefully, it is the easiest. If you are adventuresome you can actually do merges going directly against the POMA Database, but this would require a good understanding of the mail merge capability as well as the structure of the POMA database.

Open Existing Word Mail Merge Document

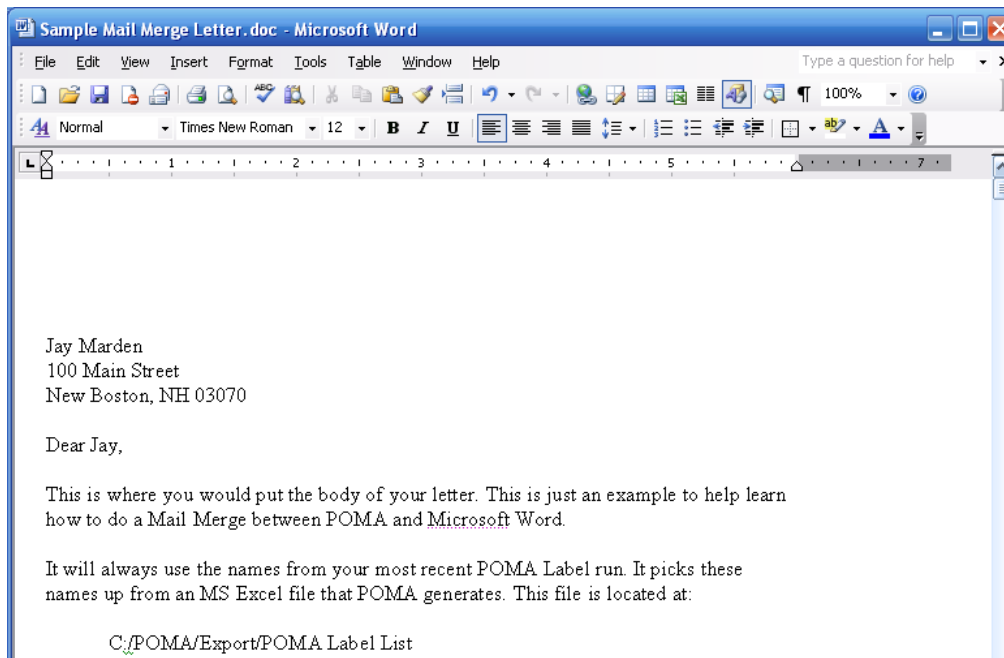
Along with this technique you should have received a sample Word file called:

“Sample Mail Merge Letter.doc”.

Open this document in Word. You may or may not get the following message. If you do, it is letting you know that there are names and addresses that the sample letter is to be sent to. Go ahead and click on “Yes”. If you don’t get this message, just go to the next paragraph.

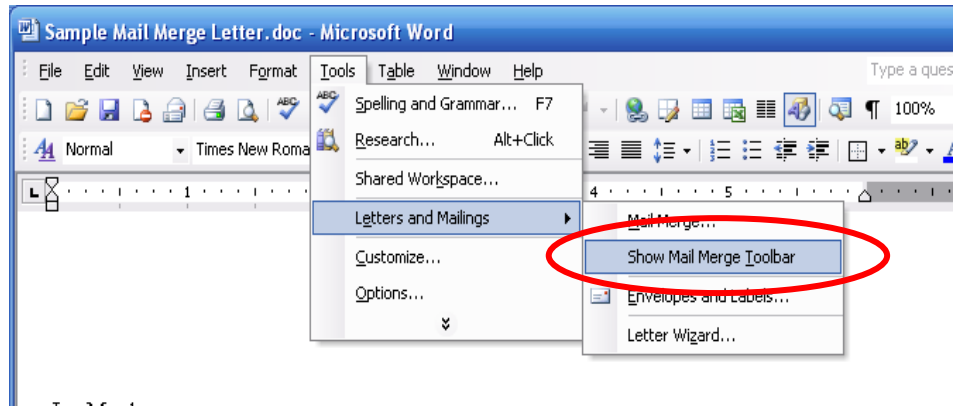


The letter that is loaded will look something like the following and notice that one of the names from your last POMA run is already in the letter. Don’t worry about this and don’t make any changes to the letter yet.

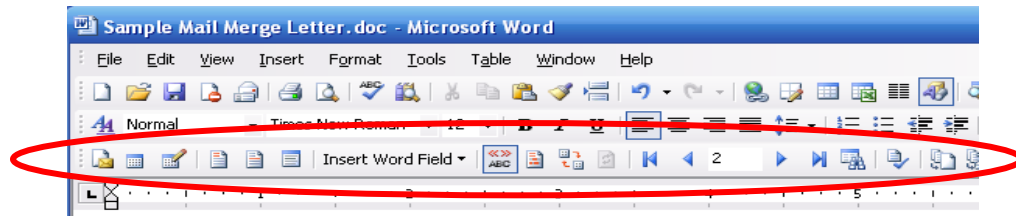


Display the Mail Merge Toolbar

Before any modifications to the letter can be done you have to display the Word Mail Merge Toolbar. Click on **Tools**, then click on **Letters and Mailings**, then click on **Show Mail Merge Toolbar**.

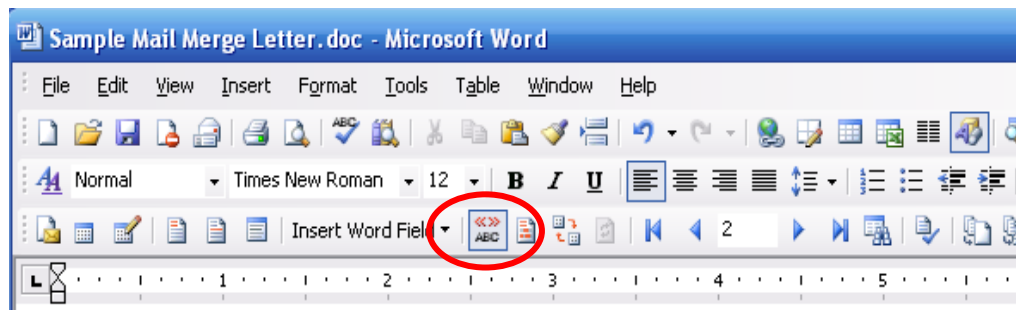


This will display the Mail Merge Toolbar which looks like the following:

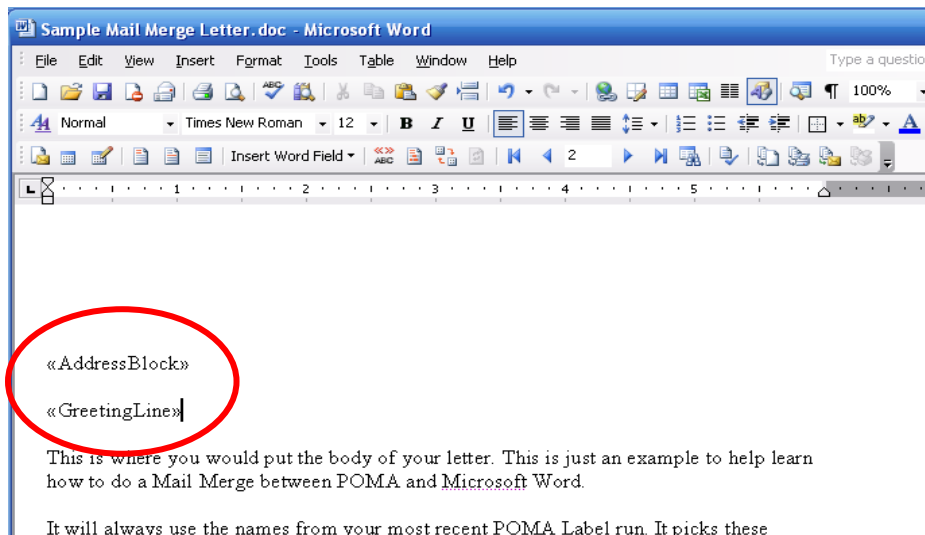


Edit Letter

In order to edit the generalized letter, however, you have to get out of the already merged data. To do this all you have to do is click on the “View Merged Data” button to turn it off. This button is shown below:



Now the letter should look like the following:

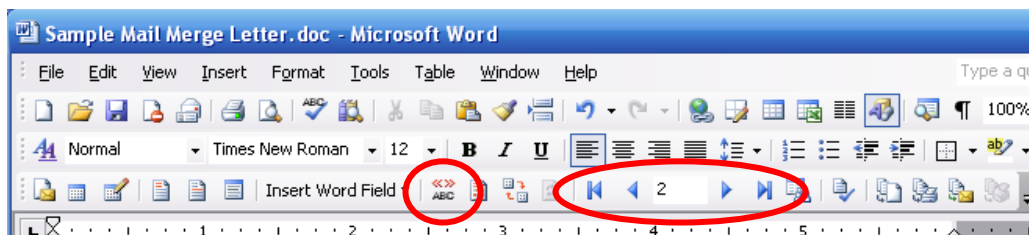


Note that the AddressBlock and GreetingLines no longer have names, but rather a single line with arrows on either side. Do NOT delete these lines. They are what are used to automatically merge your label data into the letter. You can, however, now write your letter. Delete the body of the letter that is there and replace it with yours. You can also put lines above the AddressBlock line (for example you may want to put the date centered above the address block or just below it). You can also put in line feeds to better center your letter.

Once you have written your letter, be sure to save it with your own letter name clicking on **File** then **Save As...**

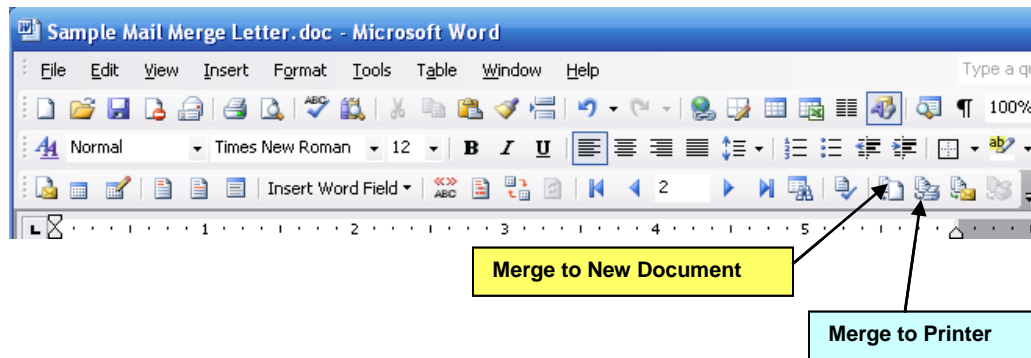
View Your Merged Letters

Now that you have your own letter, you can view the merged letters by clicking on the “View Merged Data” button and scroll through each of letters using the “Record” arrows. Both of these items are highlighted below.



Printing Your Letters

Now you are ready to print your letters. There are two ways you can do this. First, there is a button on the Mail Merge Toolbar titled “Merge to Printer”. This will print all the letters (you also have the option of just printing selected ones). Second, you can select the button titled “Merge to New Document” which will produce a new Word document with all the individual letters in it and you can print it in the normal fashion. The diagram below shows where these two buttons are on the toolbar.



Conclusion

There is much more you can do with the mail merge function of Word, but this will at least give you a starting point.

If you have questions or want to merge other data in the POMA database, just call POMA Support.