



# Datatel Users Coffee Klatch

## Mail Merge Processing from Datatel

---

Once you have a document downloaded from the Datatel system, you need to use that document some how. Typically this is done through mail merge. Using mail merge with a Datatel data file is a little different than standard mail merges. To begin with the data document has no header of field names.

### Creating a Header for mail merges

The header file consists of a row of field names separated by commas. You can create these any way you want. I will show two examples:

#### *In Word:*

Start a new document

Type the field names as you would like them to be called in your merge document

Separate each field name with a comma

Save the file

#### *In Excel*

Start a new document

Enter field names as you would like them called across the top row of the spreadsheet

Save the file

### Creating the Merge Document

Start a new word document

Select the "tools" menu

Select "Mail Merge"

Under "Main Document" Click "Create"

Choose "Form Letters" (you could make other types of documents as well)

Choose "Active Window" (This will use the new blank document as your merge letter)

#### *Setting the Header:*

Under "Data Source" Choose "Get Data"

Select "Header Options"

Choose "Open"

Change "File of Type" to ALL

Navigate to your header file you saved earlier and select it

If it is an excel worksheet you will be asked to select all or part of the worksheet...

Click "OK"

If it is a Comma separated file...

Select ";" (comma) as the filed delimiter

Click "OK"

#### *Setting the Data File:*

Under "Data Source" Choose "Get data"

Choose "Open Data Source"

Change "File of Type" to ALL

Navigate to your downloaded data file and select it

Select ";" (comma) as the filed delimiter

Click "OK"

Click "Edit Main Document"

---

*Create the Merge Letter:*

We can now create the Letter to be merged. You are now on your blank document you started with and there are Merge buttons at the top of the screen. To create your letter, begin typing the content. When you need to use a data field:

Click on “Insert Merge Field”

Select the needed field

As you create the document, you can use any or of the fields and you can use them more than once. Remember to include any formatting or punctuation you might want. Once the document is complete you can merge the document by doing the following:

*Merging the Letters:*

Click on the “Tools” Menu

Click “Mail Merge”

Click on “Merge”

“New Document “ will be selected

Click “Merge”



Whitman College Technology Services

© Copyright 2001