Mail Merging Pay2K Data into Microsoft Word

This guide will take you through the process of merging your selected Pay2K data into Microsoft Word so that you can print mailing labels. It also shows you how to create customised mailing labels for the style of labels that you have purchased. (Microsoft Word '97 is used for the following steps.)

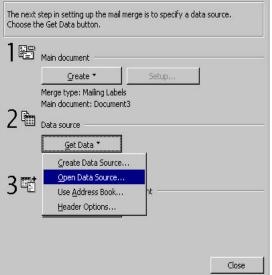
- 1. Open word and go to Tools>Mail Merge on the main menu. The mail merge helper screen will appear.
- 2. Click the Create button and choose mailing labels from the dropdown list.

Main document Create Form Letters Mailing Labels Envelopes Catalog	e this che tton.	cklist to set up a mail merge. Begin by choosing l	the Create
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Microsoft Word	×
To create the mailing labels, you can use the a new document window.	active document window Document4 or
Active Window	lew Main Document

- 4. Now click the Get Data button in the Mail Merge Helper and choose the Open data source option from the dropdown menu.
- that you opened in Word for the mail merge. Mail Merge Helper

3. Click on the Active Window button. This means that you will use the new document



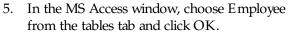
The Open Data Source screen will appear.

- In the File Type field choose MS Access Database to display all the Access files.
- Go to the c:\program files\Pay2k\data\ and open the Pay2k.samtest file.

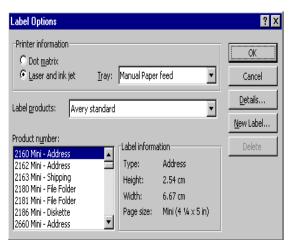
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6. Click the Setup main Document button to display the Label Options window.







7. To create a custom label, click the New Label button. The New Custom Laser dialog box will appear.

- Enter the measurements of your label.
- \blacktriangleright Choose the page size A4 (21 x 29.7 cm).
- Type a name in the label name field. For example, "Pay2K Employee Label 2x10".
- Click OK.

Tip: Measurements in Word will default to inches, so if you wish to change this go to Tools>Options on the main menu, click the General tab and change your measurement units to centimetres.

New Custom las	er		? ×
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Horizontal pitch:	8.89 cm 🌻	Number <u>d</u> own:	10 🛓
Page size:	A4 (21 × 29.7 cm)		•
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The label options screen will now display the custom label that you have just created.

Label Options			? ×
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9. Click the Insert Merge field button to display a list of fields, then click on a field to insert it into the Sample label window. In this case you would choose the name, address, suburb, state and postcode fields.

8. Choose the Pay2K Employee label 2x10 and click OK. The Create Labels window will now appear so you can continue your mail merge.

Note: Once you create a label it is then stored in the product number list for you to use next time.

Create Labels	<u>?</u> ×
	tton to insert merge fields into the rmat the merge fields and text in the
In <u>s</u> ert Merge Field *	Insert Postal Bar Code
5ample label: «GNgme» «LNgme»	
«Addr1» «Addr2»	-
«Suburb»	_
«State» «PostCode»	
	•
	OK Cancel

• Once you have entered these, click OK.

Now the merge fields will appear in the new word document divided into sections resembling labels.

«GName» «LName»	«GName» «LName»	
«Addr1» «Addr2»	«Addr1» «Addr2»	
«Suburb»	«Suburb»	
«State» «PostCode»	«State» «PostCode»	
«GName» «LName»	«GName» «LName»	
«Addr1» «Addr2»	«Addr1» «Addr2»	
«Suburb»	«Suburb»	
«State» «PostCode»	«State» «PostCode»	

➢ At this point you can click on the View

merged data button to view the fields as merged data.

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Laonne Davidson 154 Olenherie Rd. Ezal Malven 202 3145	Callean Evona 101 Matcalf Bu Hooptan VIC 5188	

Mail Merg	e Helper ? X
	document and data source are ready to merge. Choose the Merge complete the merge.
1 ==	Main document
	Edit * Merge type: Mailing Labels
7 🖻	Marge type: Maining Labers Main document: Document1
2 🖻	Data source
	Edit ▼
~	Data: Pay2K-SAM!TABLE tblEmployee
35	Merge the data with the document
	Query Options
	Options in effect: Suppress Blank Lines in Addresses Merge to new document
	Close

- 11. In the Merge window choose "Printer" in the Merge to field.
- Select the All records button if you wish to merge all the data or click the From button to select a group of records.
- Click the Merge button

10. On the Mail Merge Helper that is also on the screen, click the Merge button.

Merge to:	<u>M</u> erge
Printer Setup	<u>C</u> ancel
Records to be merged	Check <u>E</u> rrors
When merging records	Query Options
© Don't print blank lines when data fields are empty. C Print blank lines when data fields are empty.	

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Options	ОК	Cancel

13. Now save document 1 as a "Pay2K Employee merge fields" document.

12. In the Print window, click OK to print the labels.

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Tip: The next time you need to print employee labels, you can open the saved merge fields

document, click the Merge to Printer button and Word will automatically search for the employee data, merge it, print, and also show any changes to the data (for example a new employee) since you last merged.