Merging QuickPermit Data
Into A Microsoft Word Document

Overview:

The data that is displayed in a QuickPermit report (lists, letters, and labels) may be used to create a dynamic Word document. For instance, this would allow you to create a standard letter that contains customized text fields (names, addresses, etc.). An example of the use of this technique would be to mail a single custom letter to all employers in QuickPermit with each letter being addressed to a specific employer. This tutorial will walk you through the process that will create such a merged document.

Note: Because QuickPermit is a secure database you cannot directly access its data from an external application like Word. So it will be necessary to export QuickPermit's data from within QuickPermit to an external application. We will use Excel as the external application that will then serve as the data source for our merged document. Use of Excel provides the advantage of viewing and editing the data before merging it into our Word document (i.e. rename fields, format fields, sort records, etc.).

The following instructions are specific for Word 2000 and Excel 2000. If the version that you are using is different, the procedure to create a merged Word document may vary. For instructions specific to your version of Word, search Word's help file for "Mail Merge".

Step 1

Select a report containing the required data.

Because we will only need name and address fields we will use the Employers Mailing Labels report as the data source for our document.
- From QuickPermit's Main Switchboard, open the Reports form.
- Select "Employers" from the "Category" list.
- Select "Labels – Letter Size" from the "Available Reports" list.
- Select "All Employers" from the "Employers" frame.
- Click the "View" button to display the report.

Step 2

Exporting QuickPermit data to Excel

This operation requires that you have Excel installed on your machine.
- On the menu bar, select: File \ Analyze with MS Excel.

Step 3

Editing the Excel data source.

Rename the field names in Excel that will be used in the merged document.
- Change the field names (in the first row) to: ATTN, EMPLOYER, ADDRESS1, and ADDRESS2
- If you don't have contact names or don't want to use them in the document, then the ATTN column may be deleted.

Step 4

Saving the edited Excel file.

This step requires some basic knowledge of the Windows file structure. It is important that you remember the name that you give to the Excel file and where it is saved.
- Use Excel's menu bar to select: File \ Save As.
- In the "Save As" dialog, navigate to the folder where you want to save the data source, give it a distinctive name, and click the "Save" button.

Step 5

Establish a connection to the Excel data source.

Open a new Word document and follow the steps below.
- Using the menu bar, select: Tools \ Mail Merge
- In the "Mail Merge Helper" dialog, select to "Create" the Main Document.
- Select "Form Letters" as the document type.
- Select "Active Window" when prompted.
- In the "Mail Merge Helper" dialog, select "Get Data".
- Select "Open Data Source".
- Use the "Open Data Source" dialog to navigate to the Excel file that you previously saved in Step #4.

    Note: In order to find the Excel file, it is necessary to select "MS Excel Worksheets" in the "Files of Type" field.

- In the "Open Data Source" dialog, click the "Open" button.
- Select "Entire Spreadsheet" when prompted and click "Ok".
- Select "Edit Main Document" when prompted.

Step 6

Format the main document that will be merged with the Excel data source.

The following steps should be completed in the same Word document that is active after completion of Step #5.
- Using the menu bar, select: File \ Page Setup.
- On the "Margins" tab, enter the following margin settings: (Top = .75, Bottom = .75, Left = .5, Right = .5).
- Click "Ok" to save the margin settings.
- Set the font size to 12 pts.

Step 7

Compose the main document.

Note: Refer to the "Sample" document template at the end of this tutorial.

Beginning with the cursor at the top of the page (line 1), compose the main document.
- Enter your school name, address, and phone number (optional) on lines 1 through 4.
- Use the "Insert Merged Fields" control to insert each field into your document on lines 9 through 12.
- Compose the remainder of your document.
- Save your document to the same folder that you previously saved the Excel file.

Step 8

Merge the data source with the main document created above.

The following steps can be executed from your main document at any time.
- Using the menu bar, select: Tools \ Mail Merge.
- In the "Merge" dialog, select to merge to "New Document".
- In the "Mail Merge Helper" dialog, select the "Merge" button.
- View and /or print the merged document.

Note: It is not necessary to save the "merged" document that is created in Step #8. It is automatically recreated each time you perform Step #8 from your saved main document. It is suggested that you test the alignment of the merged document by printing only one page (choose "Current Page" in the print window before printing).

Sample / Document Specifications

Line 1   SCHOOL NAME
Line 2   STREET ADDRESS
Line 3   CITY, STATE ZIP
Line 4   PHONE (Optional -- If only a 3-line address block is used, leave this line blank.)
Line 5   BLANK LINE
Line 6   BLANK LINE
Line 7   BLANK LINE
Line 8   BLANK LINE
Line 9   MERGE DATA FIELD #1
Line 10   MERGE DATA FIELD #2
Line 11   MERGE DATA FIELD #3
Line 12   MERGE DATA FIELD #4   (Optional -- If only a 3-line address block is used, leave this line blank.)
Line 13   BLANK LINE
Line 14   BLANK LINE
Line 15   Dear Employer   _ _ _ _ _ _ (TOP FOLD) _ _ _ _ _ (3 5/8" FROM TOP OF PAPER) _ _ _ _ _ _ _
Line 16   BLANK LINE
Line 17   Begin the body of the letter.   ***
Line 18   X
Line 19   X
Line 20   X

ENVELOPE		
#9 Double Window Envelope		
(Columbian - #CO165 or equivalent)		

Line 21   X
Line 22   X
Line 23   X
Line 24   X
Line 25   X

PAGE SETUP			
Top Margin	.75	Font Size	12 pt.
Bottom Margin	.75		
Left Margin	.5		
Right Margin	.5		

Line 26   X
Line 27   X
Line 28   X
Line 29   X
Line 30   X
Line 31   X
Line 32   X
Line 33   X
Line 34   X
Line 35   X   _ _ _ _ _ _ _ _ _ _ _ (BOTTOM FOLD) _ _ _ _ _ (7 3/8" FROM TOP OF PAPER) _ _ _ _
Line 36   X
Line 37   X
Line 38   X
Line 39   X
Line 40   X
Line 41   X
Line 42   End of body   ***
Line 43   BLANK LINE
Line 44   Sincerely,
Line 45   BLANK LINE
Line 46   BLANK LINE
Line 47   YOUR NAME
Line 48   YOUR TITLE
Line 49   BLANK LINE