



Making the Most of Merge Letters

Basics

Why Use Merge Letters?

- More accurate
- Saves time
- “Never type the same thing twice!”

Review

What is a Merge Document?

The part of the merge operation that includes the text that does not change per document.

What is a Data Source?

A data source supplies the Merge Letter with the text that changes in each letter – for example, the inside address information. In Pearl, the data source for a merge letter is a query.

The Pearl query includes any fields that will be used in the letter, will define the SORT order – the order in which the letters will print, and includes any criteria that defines which records the merge letters will print for.

Word merge letters will always retrieve the latest information from the data source records.

Section 1: Before You Begin: Baseline Conditions for Successful Pearl Letters

1. All Pearl users should have the same version of Microsoft Office with all available service packs installed.
2. All Microsoft Office applications (Access, Excel, Word) should be the same version (i.e., don't mix Access 2003 with Word 2002).
3. Pearl should be updated to at least v. 4.17.
4. The user on the machine that opens Pearl must have read/write/edit permissions on Pearl's root directory and all subfolders.
5. All workstations must have Pearl mapped to the same drive in the same way. Terminal server sessions must also use that same mapping.
6. Merge letters created for Pearl must use the same drive mapping used to open Pearl (stored in the target property of the shortcut to Pearl).

Note: You will likely encounter problems if any of these conditions are not met.

Section 2: Creating a New Letter

Create a new query.

1. Name the query in a way that clearly associates it with the letter it will be used for (examples: **qryNotificationLetterDoc** or **qryNotificationLetter** and **Notification Letter.doc**, **qryNotifyDoc** or **qryNotifyLetter** and **Notify.doc**).
2. If the query's SQL statement exceeds 510 characters, you may get a message that the letter is not a merge document. Instead, base your new query on one of Pearl's full queries and only select the fields that will be used in the merge letter and fields on which to set criteria.
3. During the initial design phase or while editing an existing letter, use criteria in the query (like Num<10) to limit temporarily the size of the record set to 10 or less records. This will save time in viewing the merge to preview changes while composing the document. Remove the criteria after you are satisfied with the design and are ready to run the full merge.
4. Using a query with a parameter prompt might only work if opening the letter from the letters folder. You may get an automation error if you attempt to open the letter from Pearl Navigator. Keep in mind that Pearl Set commands will not work unless the letter is opened from Pearl Navigator.
5. **Please note: The merge-to-Chronicle feature will only work for the Chronicle of the main table in the query, and only if the key field of that table is in the query once. Keep in mind that that Constituent List and Contacts Tracking share the same Chronicle system: CLIST Chronicle, so be sure to include the Ser field in queries based on CONTACTS or CLIST. If the key field of the main table is not included in the query, Pearl will automatically insert [Pearl Chronicle No] as the first line in your merge letter and handle it accordingly.**

Create the letter.

1. In Pearl Navigator, go to Letters and click New. Select the query you just created as the data source, then click OK.
2. Compose the letter using the fields available in the query. Save when finished.
3. If you want the letters to be automatically saved to Pearl Chronicle, add this line of hidden text at the beginning of the letter in design view:

```
[Pearl Chronicle Yes]
```

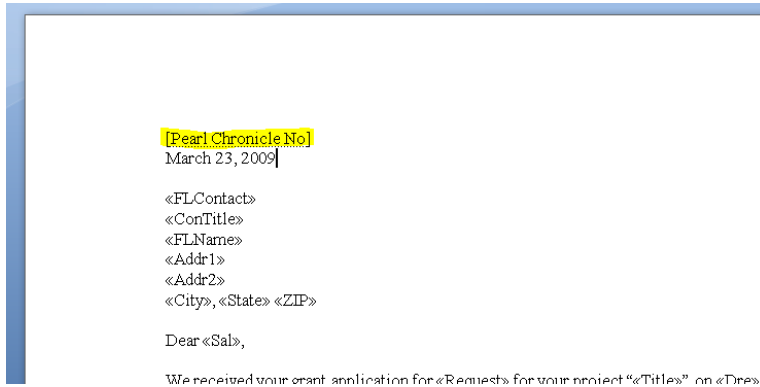
```
March 23, 2009
```

```
<<FLContact>  
<<ConTitle>  
<<FLName>  
<<Addr1>  
<<Addr2>  
<<City>, <<State> <<ZIP>
```

```
Dear <<Sal>,
```

```
We received your grant application for <<Request> for your project "<<Title>" on <<Dre>
```

4. If you do not want the letters to be saved to Chronicle, add this line of hidden text at the beginning of the letter in design view:



5. If neither [Pearl chronicle Yes] nor [Pearl Chronicle No] is added to the beginning of the letter in design view, Pearl will offer to save the letters to Chronicle at the time the merge is executed.
6. Test the letter by previewing it from Pearl Navigator. If the size of the query's record set is not limited by criteria, use a filter when previewing the letter.

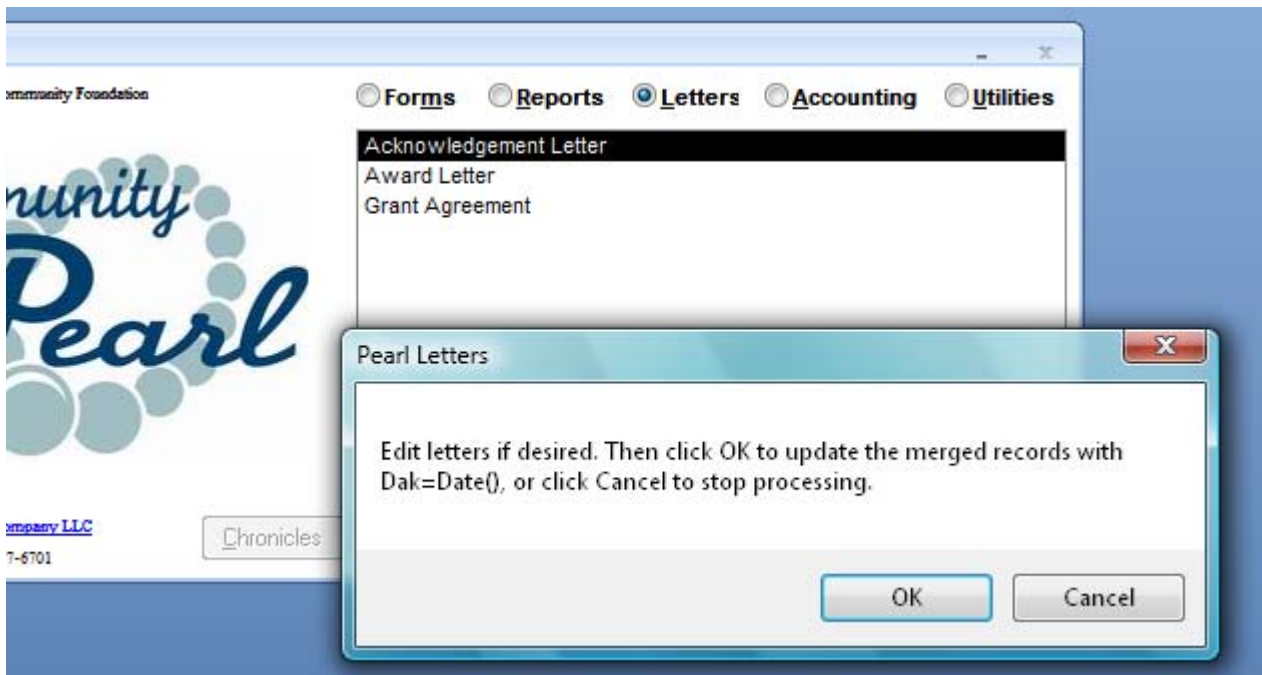
Section 3: Reattaching a Letter to its Data Source

1. Identify the query in Pearl that the letter needs to be connected to. Unhide the database window in Pearl and find the query in the list of query objects. Open the query to find out how many records are in the record set. If there are more than 20 to 30 records, go to design view and change the criteria (this can be temporary) so that there are less than 30 records that display when the query is run. (For example, change the criteria for Dco from >#6/1/2007# to >#6/1/2008.) Save changes.
2. Close Pearl. Open the letter in the Pearl\Letters\ folder (using the common mapped drive) with Word. If you get a message that Word could not find the data source, click the Options button, then click on the Remove Data/Header Source. If you do NOT get that message, continue with step 3.
3. In the Tools menu, select Letters and Mailings>>Mail Merge.... On step 3 of 6, click on "Select different data source" or "Browse" depending on whether you had to click through the message boxes in step 2. Navigate to Pearl.mdb using the common mapped drive for Pearl. Select Pearl.mdb and click Open.
4. In the Confirm Data Source box, select the DDE connection and click OK. Find and select the query from Step 1, make sure the Link to Query checkbox is checked and click OK. Click OK when the merge records display. Close the Letter and save changes.
5. Open Pearl and verify that the merge is working as expected when you open the letter in Preview mode from Pearl Navigator. Initially, two Word documents should open, then one of them will close after the merge is executed.

Section 4: Running Merge Letters

With [Pearl Chronicle Yes]

The merge will execute and you will receive this message. If you have a Set Command in the letter, Pearl will indicate how your data will be updated.



Caution: The message may be hiding behind the Word document. *Do not close the merge document before clicking **OK** or **Cancel** – Pearl will close it for you.*

Each letter will have a line of hidden text indicating the source record in Pearl. Pearl will attach the letter to the corresponding record in Pearl Chronicle.

[Pearl Record REQUESTS-1]
[Pearl Chronicle Yes]
March 23, 2009

Laura Carlson

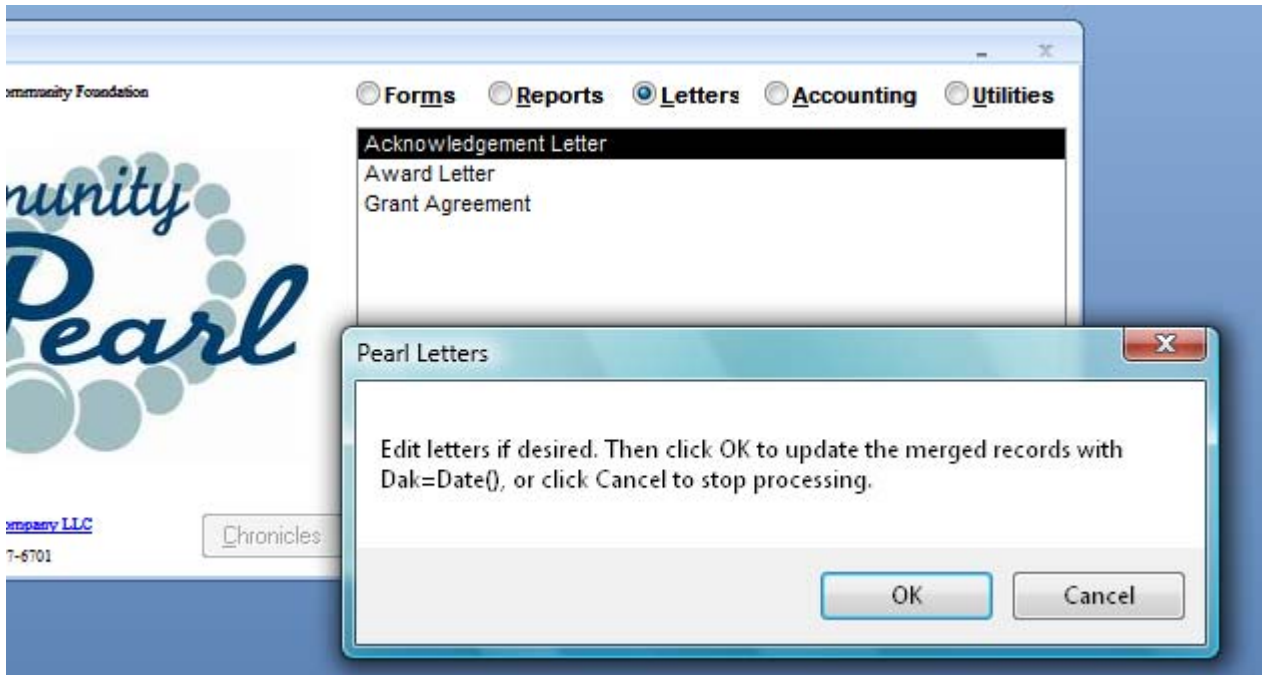
If you choose to send your letters to Chronicle, you still have the option of saving the Letters1 document as one large document from Word. Keep in mind, however, that any changes you make to that document after saving the letters to Chronicle will not be reflected in the individual letters in Chronicle.

Section 4: Running Merge Letters (cont.)

With [Pearl Chronicle No]

Please note: If the query behind your merge letter does not include the key field of the main table in your query, Pearl will automatically make your merge letter a [Pearl Chronicle No] letter.

If you have a Set Command in the letter, Pearl will indicate how your data will be updated. If you do not have a Set Command in the letter, you will not get a message.



Caution: The message may be hiding behind the Word document. *Do not close the merge document before clicking **OK** or **Cancel**. Pearl will not automatically close the letter if it is set to [Pearl Chronicle No].*

Each letter will have a line of hidden text indicating the source record in Pearl, but will not save the letters to Chronicle.

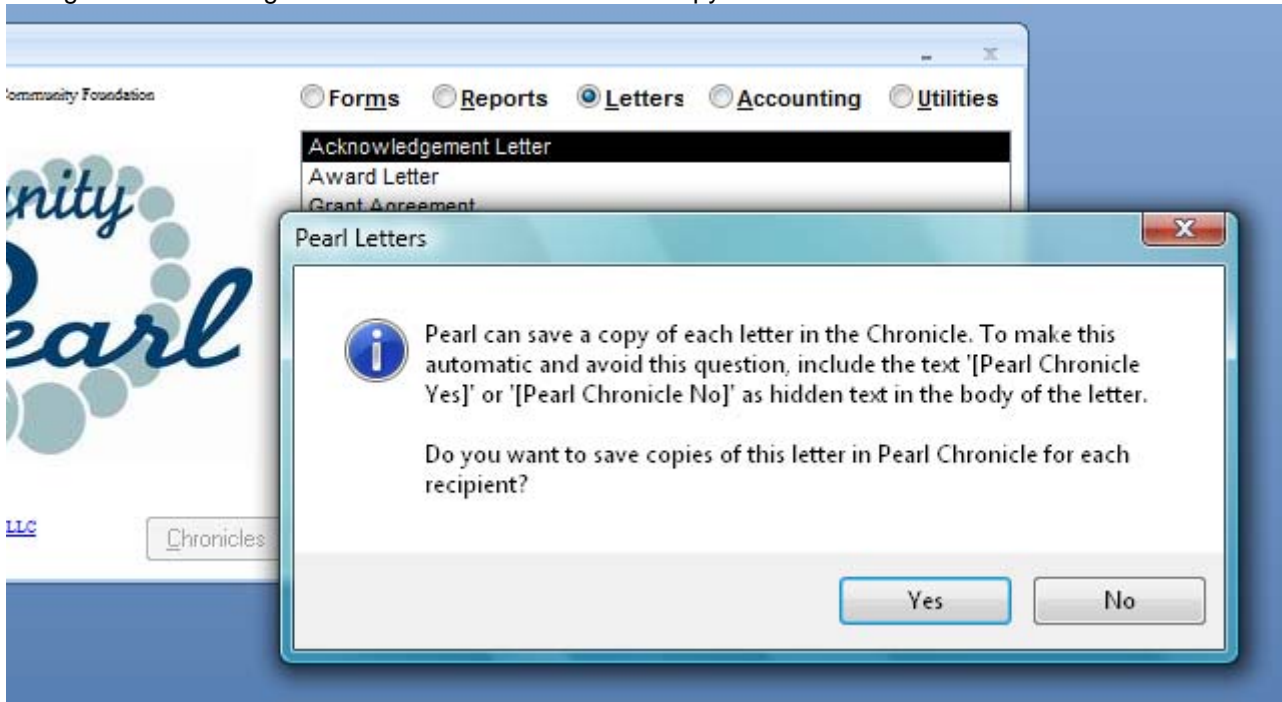
[Pearl Record REQUESTS-1]
[Pearl Chronicle No]
March 23, 2009

Laura Carlson

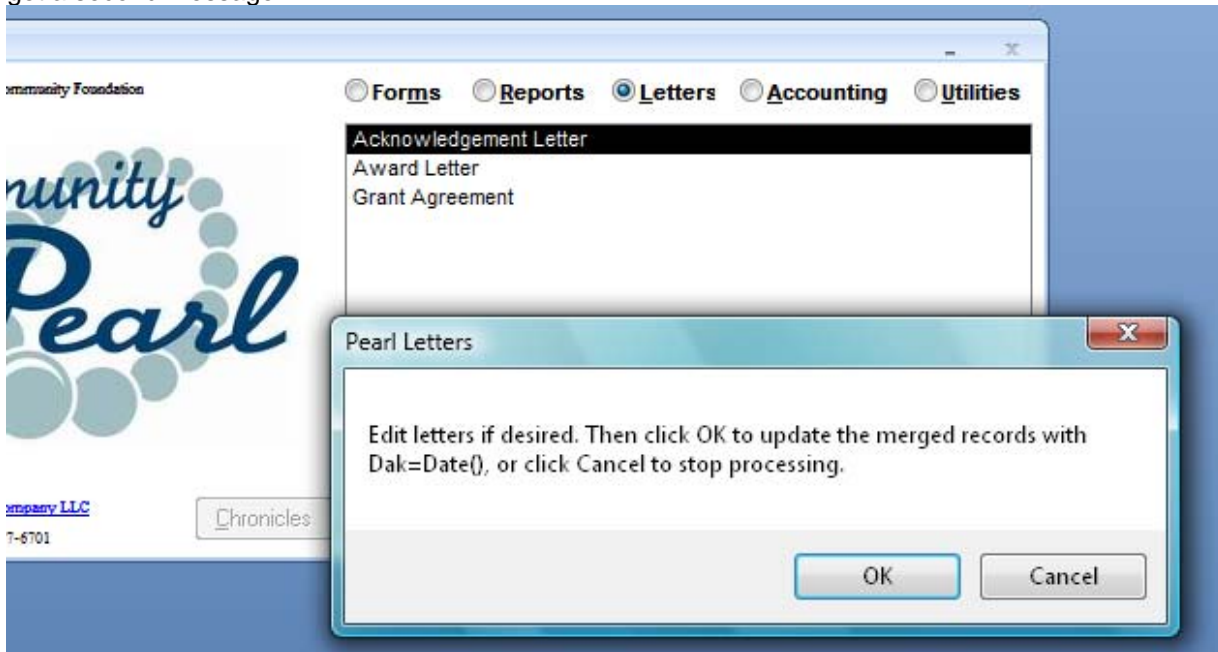
Section 4: Running Merge Letters (cont.)

Without [Pearl Chronicle Yes] or [Pearl Chronicle No]

Pearl will first display a message about how to make processing to Chronicle automatic. Caution: The message may be hiding behind the merge letter. Pearl will offer to save a copy of each letter in Chronicle.



If the key field of the main table is not included in the query, Pearl will automatically insert [Pearl Chronicle No] as the first line in your merge letter and handle it accordingly. When you click on the Yes or No button and if there is a Set Command in the Letter, Pearl will indicate how the data will be updated. If you select No and there is no Set Command, you will not get a second message.



Caution: The message may be hiding behind the Word document. Do not close the merge document before clicking **OK** or **Cancel**, or you will get an error message. Pearl will not automatically close the letter unless you have chosen to save copies of the letter in Chronicle.

Section 5: Tips and Tricks

Fixing Letters: Avoid the frustration of attempting to fix a broken merge letter by copying the body of the broken letter into Notepad. Use this de-formatted text as the basis for a fresh merge letter using the steps in Section 2.

Parameter prompts in queries: Parameter prompts will work with Pearl's Word Automation, but you may experience special problems. We recommend using filters in Pearl Navigator to achieve the same results.

For Office XP and higher: In Microsoft Word, click on the Tools dropdown menu and select Options. Under the General tab, make sure the 'Confirm Conversion at Open' (about 4th one down) option is marked. As you are going thru the mail merge steps, after you select your data source (step 3), you'll get a Confirm Data Source box - make sure you select the MSAccess Databases via DDE (*mdb, *mde) option.

Recipients List: If you are not seeing all records from the query in your merged document, check two things:

1. In Design view, click on the Mail Merge Recipients icon. In the Mail Merge Recipients dialog box, click the arrow in front of one of the column headings and click (Advanced...). In the Query Options dialog box, click the Clear All button if there is any criteria applied.
2. Be sure the record Navigator is set to #1.

The best site for general Word merge tips: <http://homepage.swissonline.ch/cindymeister/MergFram.htm>

Section 6: Pearl Set – Updating Fields in Pearl during the Merge Letter Procedure

At the end of any Merge Letter you can imbed commands to update one or more Pearl fields that the Merge document "knows" about.

The Pearl Set commands must be enclosed in square brackets in hidden text and adhere to the following format. [Pearl Set FieldToUpdate=Value] (If case is altered from example, function does not work.)

When you preview the merge letter from the Pearl Navigator, Microsoft Word is loaded, the template document is loaded and the merge automatically takes place to a new document. IT WON'T WORK IF YOU DON'T PREVIEW FROM THE NAVIGATOR

Preview and print the merge letters, then close the new document (save it if you want). Notice that the Pearl icon on the Start Bar is blinking, click on it and you'll see a prompt asking if you want to update the field you specified with the data you specified. If you respond "Yes", you'll see a second message that tells you how many records will be updated with that information. If you've set more than one field to be update, the additional update questions will be displayed. If you DON'T want the Pearl fields updated, click No when prompted.

NOTE: Since the Pearl Set command gets formatted as hidden text, you MUST turn on the formatting marks to show Hidden Text (In MSWord click on the Tool dropdown menu, select Options, under Formatting Marks section, check the Hidden Text option). **Important: This must be done after opening the letter from Pearl Navigator using the Design button; doing this after opening the letter from the Letters folder will not affect Word settings for Pearl's use of Word Automation.** The Pearl Set command should be the last line in the merge letter HOWEVER, do not make the final hard carriage return be hidden. You can verify that it is not by marking the ALL option under Formatting Marks.

Examples of the field updates you can do:

```
[Pearl Set DateField=DateAdd("m",-3,[date])]  
[Pearl Set DateField=Date()]  
[Pearl Set DateField=[Update DateField to what date?]]  
[Pearl Set DateField=Now()+1]
```

```
[Pearl Set TextField=NULL]  
[Pearl Set TextField="Minnesota"]
```

[Pearl Set TextField="State: "&[State]]
[Pearl Set TextField=[Update TextField to what State?]]

[Pearl Set NumField=1000]
[Pearl Set NumField=if([each]>500,[each]+100,[each])]
[Pearl Set NumField=[each]+500]
[Pearl Set NumField=NULL]

Section 7: Advanced Features

“If Then Else” Statements

Drop down menu on the **Insert Word Field** button on toolbar; Fill in the Fields to compare and the operator. Type the text in the “**insert this text**” area which you would like to see in the merged document, if the comparison is true. In the area of the Window that says “**Otherwise Insert this Text,**” type in a place holder like, “XXXX”. Then press **Okay**. From your merge document, place the cursor at the place holder and start the **If Then Else** process over.

What’s the Difference between Ask and Fill In?

(Drop down menu on the **Insert Word Field** button on toolbar)

A Fill-In Prompts you to enter text. Your response is printed in place of the field. The prompt is displayed each time a new data record is merged unless you choose the **Ask Once** checkbox.

Displaying Dates

To track when a document was created, last printed, or last saved, click **Field** on the **Insert** menu, click **Date and time** in the **Categories** box, and then insert a CREATEDATE, PRINTDATE, or SAVEDATE field. You can use options with these fields to print the date, the time, or both.

Switch formatting (dates and numbers)

When you merge number and date fields from an Access query, the format of those fields will appear as they are stored in the database – for instance, a date may appear as **12/25/2005** instead of **December 25, 2005**, a number may appear as **10000** rather than **\$10,000** or a text field may display ‘capital campaign’ for the program name rather than ‘Capital Campaign’ or ‘CAPITAL CAMPAIGN’. To format information coming into the merge letter, you must include formatting with the {MERGE FIELD } instructions – these formatting instructions are called ‘Switches’.

Text Switches

If the Program field in Access is stored as ‘**capital campaign**’ and you’d like it displayed as ‘**Capital Campaign**’, set the following switch:

{ **PROGRAM * Caps** } * is the text formatting switch
 Caps indicates to capitalize the first letter of each word

Other Text Switches: * FirstCap capitalize the first letter of the first word (Capital campaign)
 * Upper capitalize the entire value (CAPITAL CAMPAIGN)
 * Lower all letters lower case (capital campaign”

Numeric Switches

If the Grant field in Access is stored as **10000** and you’d like it displayed as **\$10,000** set the following switch:

{ **GRANT \# \$#,##0** } \# is the numeric formatting switch (\$10,000.00)

To include the two decimal places use **\# \$#,##0.00** as the switch

Date Switches

If the DRE field in Access is stored as **12/25/2005** and you'd like it displayed as **December 25, 2005** set the following switch:

{ DATE \ @ "MMMM d, yyyy" } \ @ is the date formatting switch

To include the day of the week – Sunday use the following switch:

\ @ "dddd MMMM d, yyyy" **Sunday December 25, 2005**

To abbreviate the month - Dec

\ @ "MMM d, yyyy" **Dec 25, 2005**

To use only the month name of the date – December

\ @ "MMM" **December**

To include the time

\ @ "dddd MMMM d, yyyy', at' h:mm". **Monday October 21, 2002 at 10:09**

Sending Merge Documents Electronically

Include the contact's email field in the query in Pearl. From the Merge Window in your Word Document, drop down the list for "Merge To" and change option to Electronic mail.

Section 8: Trouble Shooting

Where Are those "Darn" Merge Letters?

Merge letters are stored in the Pearl\letters folder on the server if on a network.

Alternative Ways to Open a Merge Letter.

Open Microsoft Word; then open document; continue using the Mail Merge Helper if necessary open query in design view; click **Office Links** on **Tools** menu, **Merge with MS Word**; choose to Create or link to an existing merge document; Save in the Pearl\Letters subfolder.

Multiple Copies of Pearl Open when Previewing

Typically, multiple copies of Pearl opening is caused by the path set for the shortcut key to Pearl being different than the path Microsoft Word is using when linking the merge document to the data source. Check the properties of the Shortcut to Pearl to see how it is mapped.

Merged Document Lost Records

Check if criteria is correct in (Access) query.

Check if Query Options (MS Word) are set in Merge Document.

Blank Lines Appear in Address of Merged Letter

From the Merge window, under "When merging records," choose the option, "Don't print blank lines when data fields are empty."

Toggling Field Codes

Use **F9** to toggle one field code or right click on Field code and choose "Toggle Field Codes"

Use **Alt +F9** to toggle field codes for whole document

Changing Word Field Options

To always see the field codes in the main document, click **Options** on the **Tools** menu, click the **View** tab, and select the **Field Codes** check box..

To show field shading in the main document, click **Options** on the **Tools** menu, click the **View** tab, and select "Always," "When selected" or "Never" from the Field Shading box.

If Field codes are printed instead of the value, information click **Options** on the **Tools** menu, click the **Print** tab, and then clear the **Field codes** check box.

Field Codes appear but no results when merged

It is critical that Insert Word Field instead of typing the squiggly brackets ({}) and typing a field. If you manually type it, it may appear the same as the correct method but Word does not interpret them as being equal.

Field is not Updating

It could be that the field is locked. To lock a field and prevent changes to the current field results, click the field, and then press CTRL+F11. To unlock a field and allow updates, click the field, and then press CTRL+SHIFT+F11.