

# Merging Exported Contact Data in Microsoft Word

## Microsoft Word – Merging Mailing Data to Letters

### LABELS

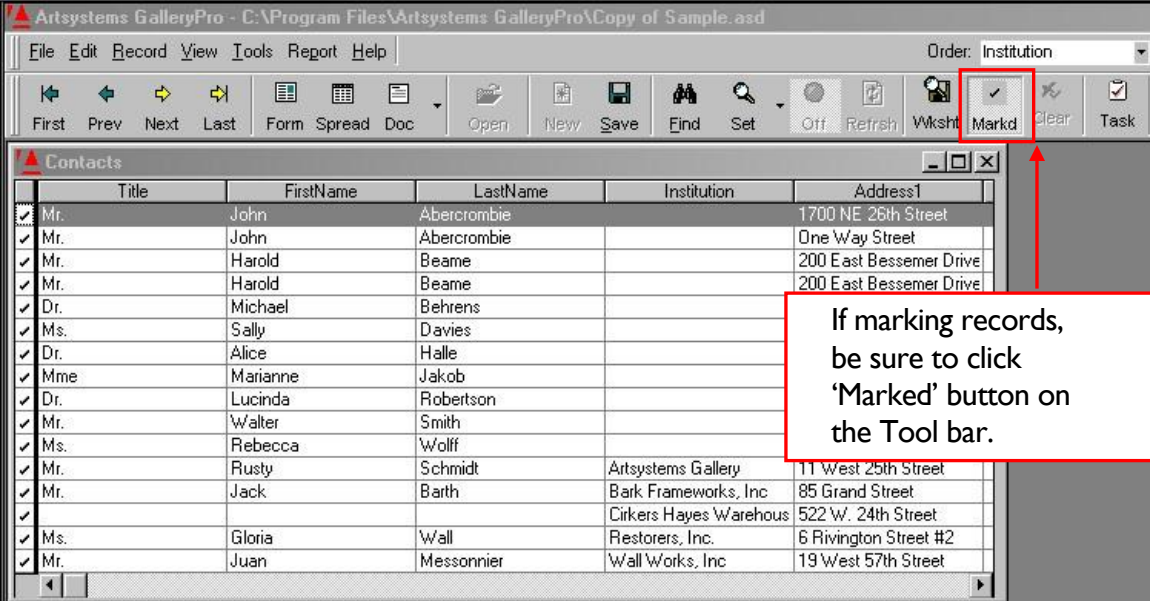
Although *GalleryPro*, *Studio*, and *Collections* include standard label reports for the most frequently requested label sizes, data can also be extracted and merged with letters, emails, and other label sizes available in *Microsoft Word*. This tutorial will cover extracting data from *GalleryPro* *Contacts* module and merging into a selected letter format in *Microsoft Word 2003*.

**NOTE:** The steps will also be similar for later versions of *Microsoft Word*. In Word 2007 and Word 2010 click the Start Mail Merge icon and select the Step by Step Mail Merge Wizard from the dropdown.

### EXPORTING DATA

- I. In the **Contacts** module, create a View set or simply mark the work records for which data will be exported. If marking records, be sure to click 'Marked' button on the Tool bar.

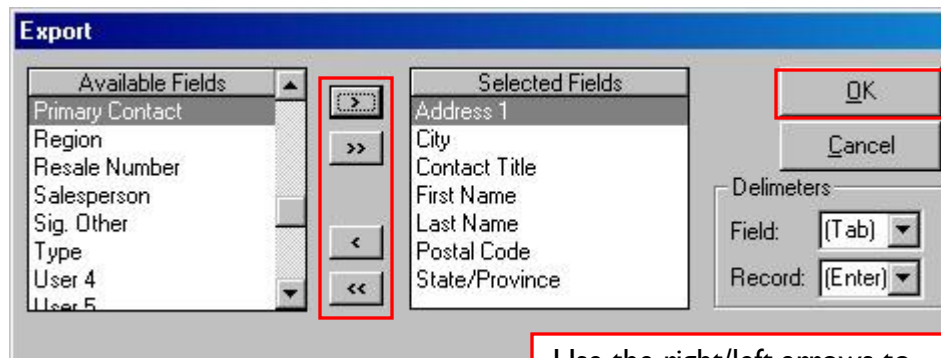
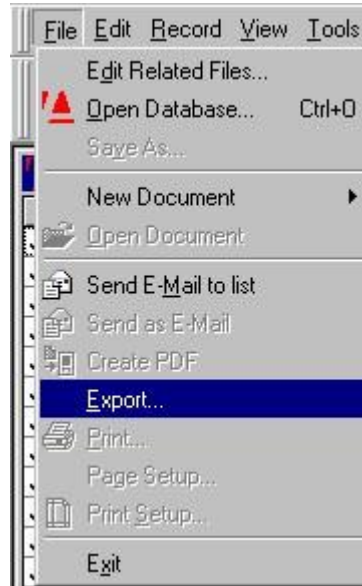
III



The screenshot shows the Artsystems GalleryPro interface. The main window displays a list of contacts with columns for Title, FirstName, LastName, Institution, and Address1. The 'Markd' button in the toolbar is highlighted with a red box. A red arrow points from the 'Markd' button to a text box that reads: 'If marking records, be sure to click 'Marked' button on the Tool bar.'

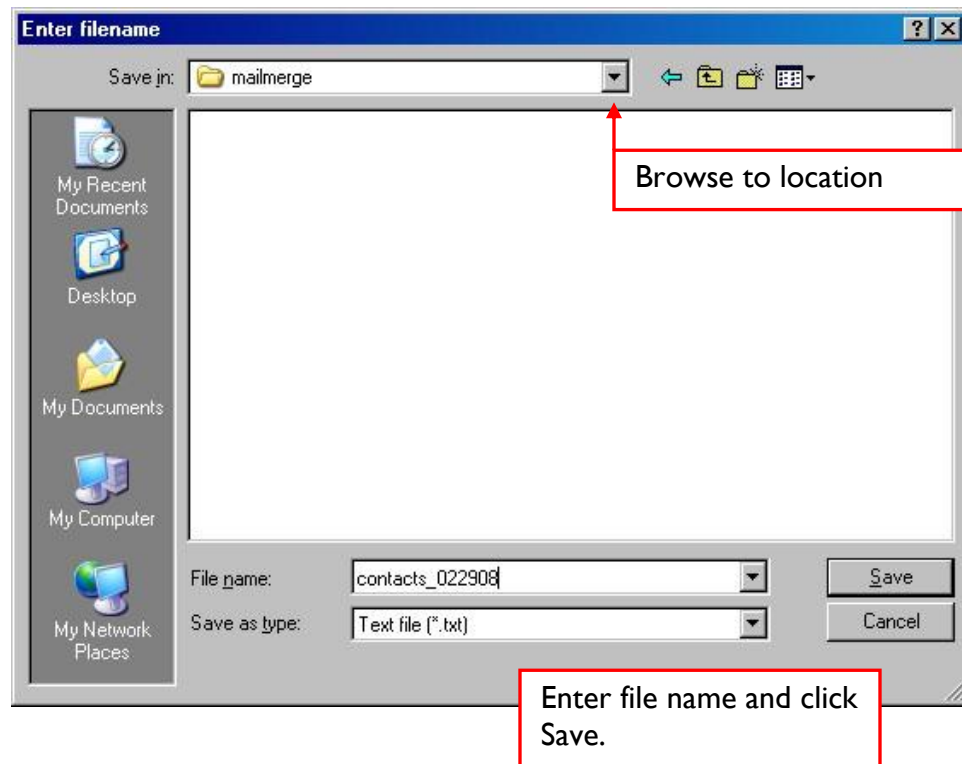
Title	FirstName	LastName	Institution	Address1
Mr.	John	Abercrombie		1700 NE 26th Street
Mr.	John	Abercrombie		One Way Street
Mr.	Harold	Beame		200 East Bessemer Drive
Mr.	Harold	Beame		200 East Bessemer Drive
Dr.	Michael	Behrens		
Ms.	Sally	Davies		
Dr.	Alice	Halle		
Mme	Marianne	Jakob		
Dr.	Lucinda	Robertson		
Mr.	Walter	Smith		
Ms.	Rebecca	Wolff		
Mr.	Rusty	Schmidt	Artsystems Gallery	11 West 25th Street
Mr.	Jack	Barth	Bark Frameworks, Inc	85 Grand Street
			Cirkers Hayes Warehouse	522 W. 24th Street
Ms.	Gloria	Wall	Restorers, Inc.	6 Rivington Street #2
Mr.	Juan	Messonier	Wall Works, Inc	19 West 57th Street

2. Click **File>Export** from the Menu bar.
3. An **Export** window will open. In the Export window there are two list boxes — one for *Available fields*, and one for *Selected fields*.
4. Use the right/left arrows to move the correct fields to the **Selected** fields list box. The Selected fields are the fields that will export. Once fields are selected, set the Delimiters as Field equals Tab and Record equals [Enter]. Then click OK.

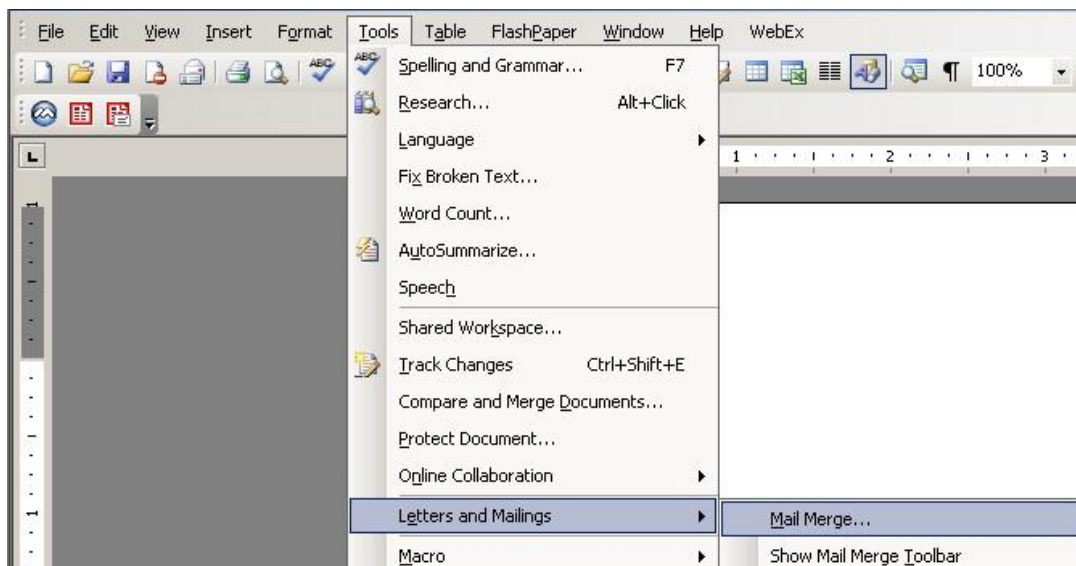


Use the right/left arrows to move correct fields to the Selected Fields column. Click OK.

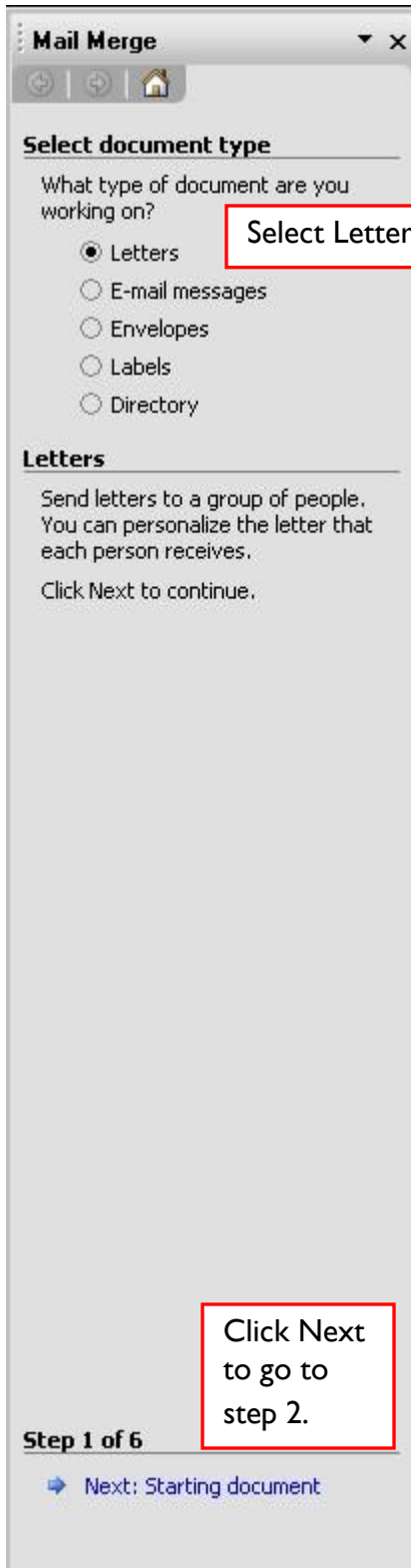
5. After clicking OK, an *enter filename* window will open. Enter a descriptive name for the file and save to a folder location easily located. This **.txt** file will become the data source used in the *Microsoft Word* merge.



6. Open *Microsoft Word 2003*. Click **File>New>Blank Document** from the Menu bar or use the New Blank Document button on the Tool bar.
7. Select **Tools>Letter and Mailings>Mail Merge** from the Menu bar in *Microsoft Word*.

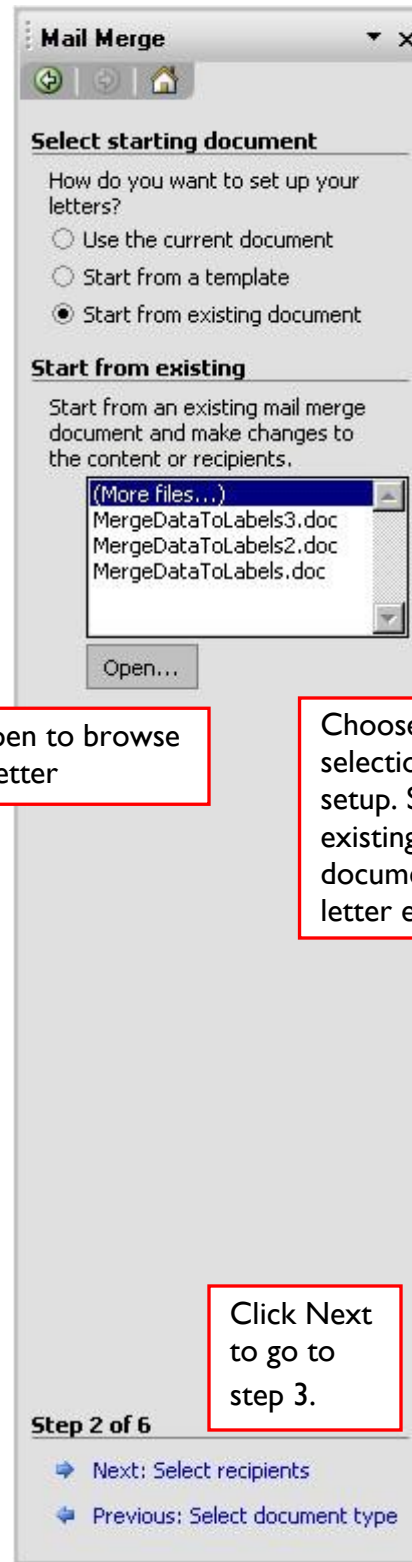


8. A **Mail Merge** wizard will open next to the document window. Follow the wizard. What type of document are you working on? Select **Letters**.



Select Letters.

Click Next to go to step 2.

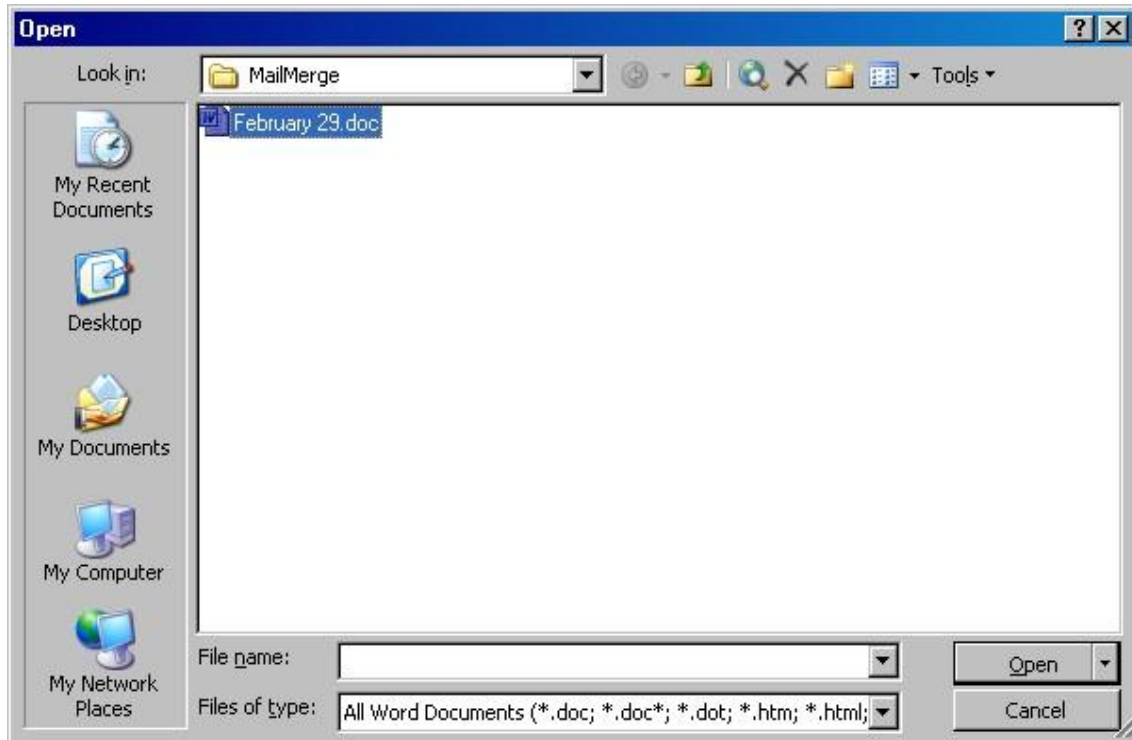


Click Open to browse for the letter

Choose selection for setup. Start from existing document if letter exists.

Click Next to go to step 3.

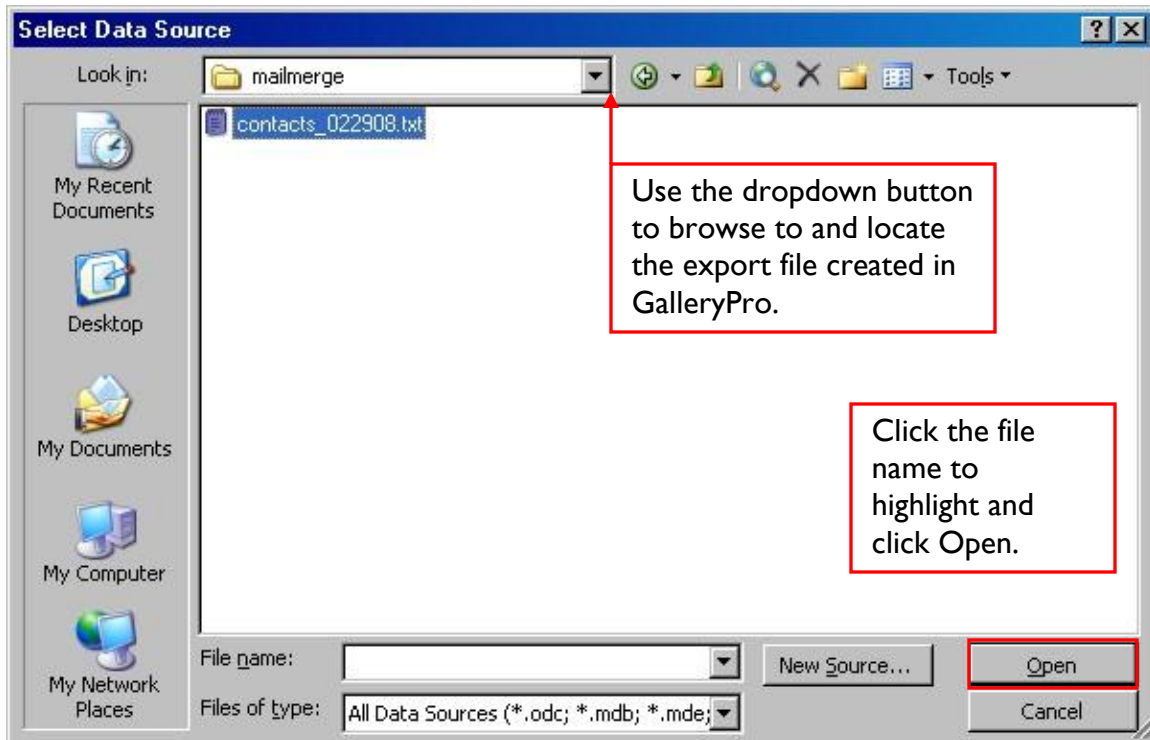
9. Click **Next** to go to Step 2.
10. Select document to be used for letters. If letter exists, choose 'Start from existing document'.
11. Click **Open** to browse for the letter document.
12. Select document by clicking with mouse and click **Open**.



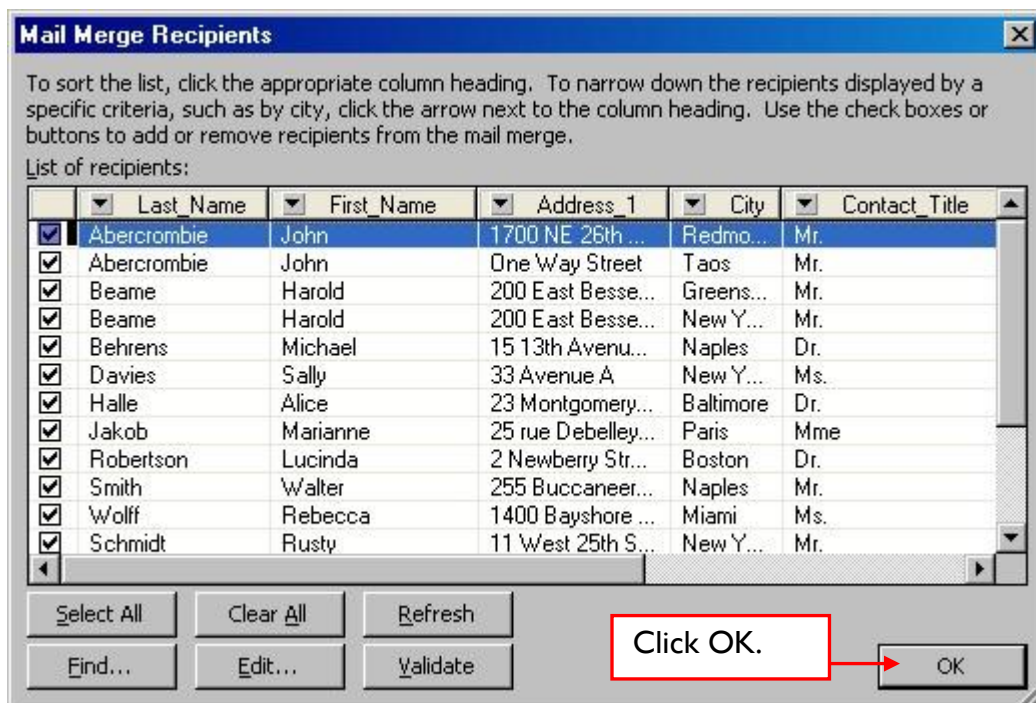
13. The letter document will open in the current document window.
14. Click **Next** in wizard to go to Step3.
15. Under **Select Recipients** in the mail merge wizard, select 'Use and existing list'.
16. Under *Use an existing list*, click the **Browse** button to locate the saved contacts.txt export created in Gallery Pro, Studio, or Collections.
17. A **Select Data Source** window will open.
18. Browse to the location of the saved contacts.txt export file created in GalleryPro, Studio, or Collections.
19. Click on the file name to highlight and click Open.

Click Use an existing list.  
Click Browse to locate the file created in GalleryPro.





20. A **Mail Merge Recipients** window will open displaying the mail contact information. Click **OK**.



21. At the bottom of the mail merge wizard, click **Next** to proceed to Step 4.

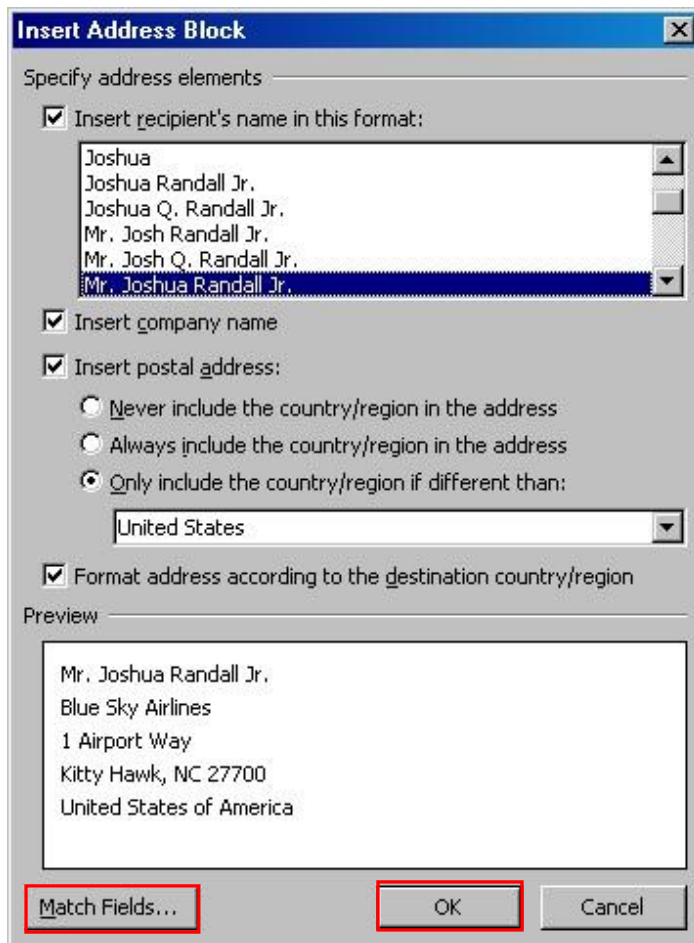
**Step 3 of 6**

- Next: Write your letter
- Previous: Starting document

22. To add recipient information to your letter click in the location of the document where the data formatting should go and click on the appropriate item(s) for this step. In this example, client address and greeting are added.

23. **Place mouse cursor** in document at appropriate location, click *Address block*.

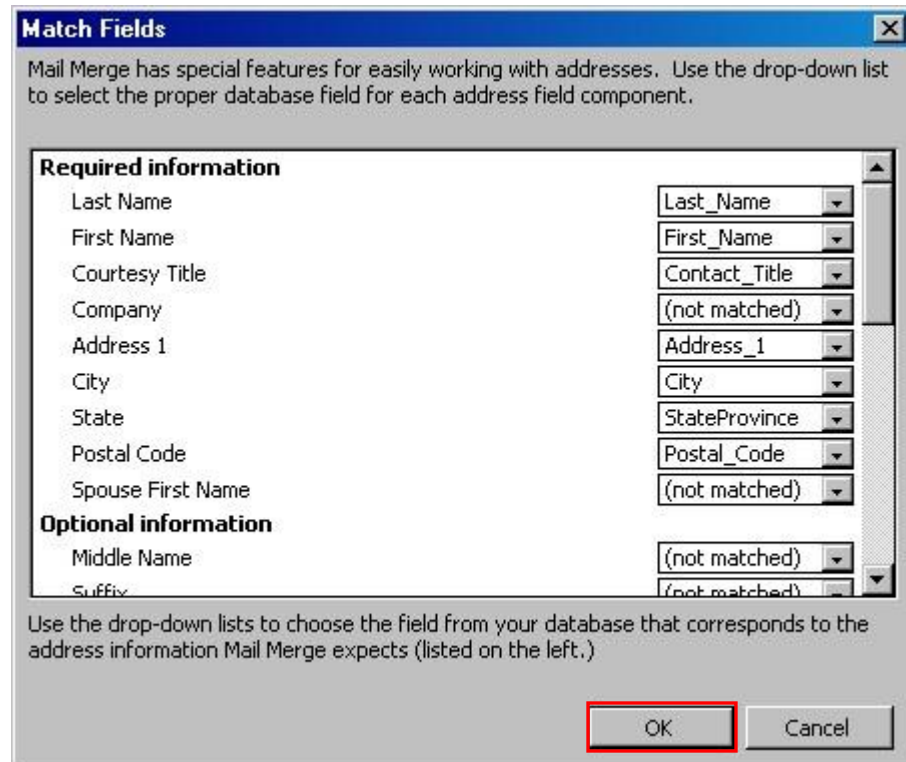
24. An Insert Address Block window will display, use the selections to specify address elements.



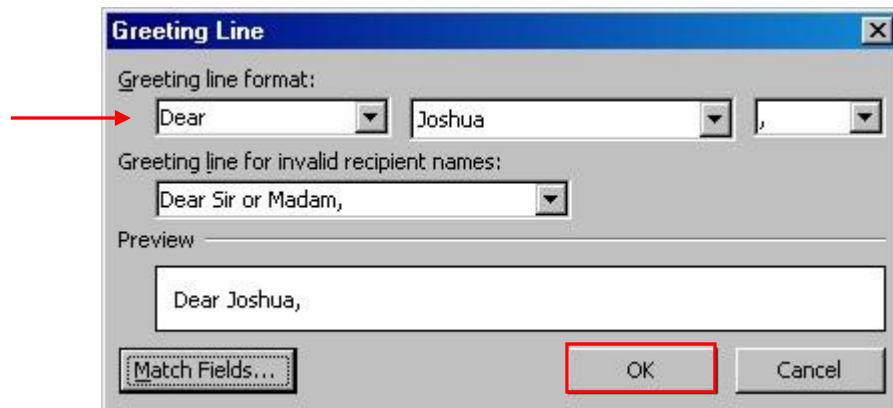
Click Match Fields button to verify all fields in export are matched correctly. .



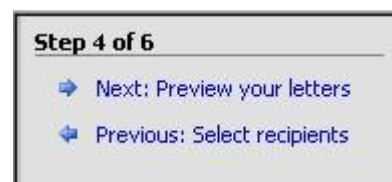
25. Click **Match Fields** button. Check for any unmatched fields included in the .txt export file and use the dropdown to match with the appropriate field.
26. Click **OK**.



27. Place mouse cursor in proper position for greeting and select *Greeting line*.
28. A Greeting Line wizard will open. Select the appropriate Greeting line format.
29. Click **OK**.



30. Click **Next** to proceed to step 5 and preview your letters.



**31. A preview of the first recipients letter will display similar as to shown.**

Artsystems Gallery  
11 West 25<sup>th</sup> Street  
New York, NY 10010

February 29, 2008

Mr. John Abercrombie  
1700 NE 26th Street  
Redmond, WA 98052

Dear John,

After searching throughout the five boroughs, Artsystems Gallery is pleased to announce the opening of our new exhibition space at 11 West 25<sup>th</sup> Street near the historic Flat Iron Building. Our new space is just a short walk from Pennsylvania Station and easily accessible on the N, Q, R and W subway lines.

Our inaugural exhibition will feature works by Jenny Freestone, whose elegant and provocative drypoints and paintings grace the walls of the Library of Congress, the World Bank and the Brooklyn Museum.

Please join us for our opening celebration on April 1, 2008.

Best Regards,

Doug Milford  
Gallery Director

- 32. Scroll through the list of recipients to **verify preview** using the arrow buttons. If you need to edit information for any recipient, click *Edit recipient list*.**
- 33. When satisfied with the letters and recipient information, click **Next** to complete the merge.**

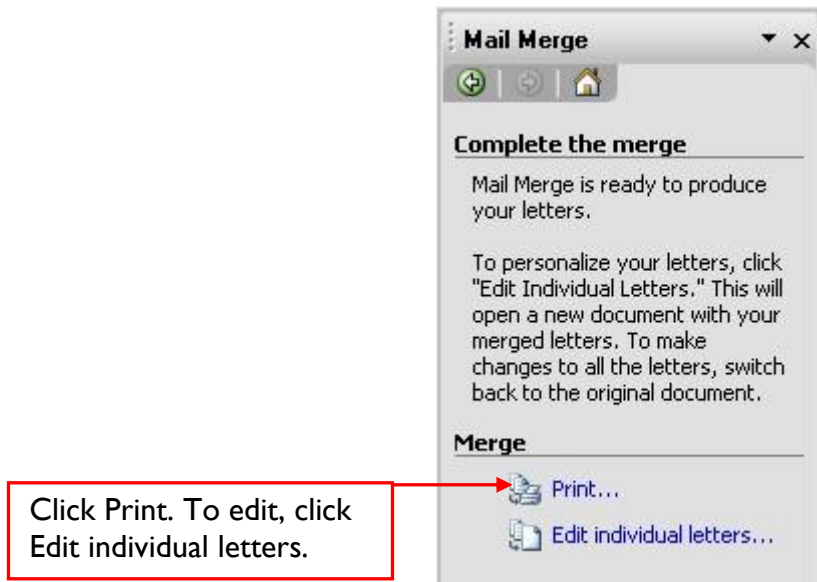
**Step 5 of 6**

➔ Next: Complete the merge

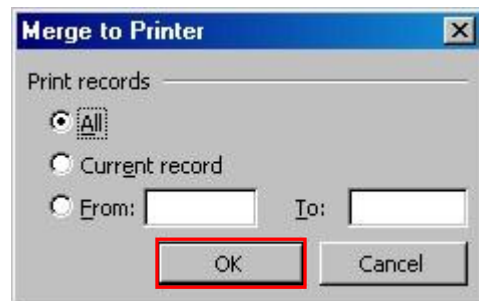
➔ Previous: Write your letter

34. At this point, you may choose to print the letters or edit any individual letter.

35. If satisfied, click **Print**.



36. A **Merge to Printer** dialog box will open. Click **OK**.



**If further assistance is needed, please contact Artsystems Support.**

**Artsystems Support 212-620-5500 x 2**

<mailto:Support@artsystems.com>