

Question: How do I create one letter to a Grantee that lists ALL their current unposted Applications?

Answer: There is a function in Word called Insert Database. The function essentially performs a mail merge within a mail merge. To further explain, it will merge your basic letter fields (grantee name, address, salutation, etc.) and then will do a second merge listing all the Applications for that Grantee in a table in the letter. This process does require running two exports – one that lists all the Applications and another that lists each Grantee only once. Using the tools in FIMS, this is easily accomplished.

Step 1: Run your Application Export to get a list of all Applications you need listed in your letter (by date or whatever criteria you need). You can use Export Application Data (or Application History Export if posted) to complete this export. Once your export is run, a screen will appear telling you how many records were exported. On this screen you have the option of mass adding Contacts or Affiliation codes to the Donor Advisor, Grantee or Payee. Use the **Create Affiliation for Grantee ID** option to mass add a temporary code to all the Grantees you just exported. This will allow you to then run a Profile Export such as Export to Word Processing to get a data file that lists each of your Grantees only once.

Create Contacts and/or Profile Affiliations for Reported ID Codes

43 unposted application records exported.
No unposted application records were skipped because allow mail was off.

You can choose to add Contacts and/or Profile Affiliations to the profiles that have been exported by checking the appropriate check boxes. If you choose to add Contacts, a Contact template will be displayed for each exported ID code type. Fill in the template with information

Create Contacts for:	Create Affiliations for:	
<input type="checkbox"/> Donor Advisor IC	<input type="checkbox"/> Donor Advisor IC	
<input type="checkbox"/> Grantee IC	<input checked="" type="checkbox"/> Grantee IC	Temp
<input type="checkbox"/> Payee ID	<input type="checkbox"/> Payee ID	

OK Skip

Note: If the Affiliation code you want to assign to each of your Grantees is not already listed in the Affiliation Code table, this process will allow you to add the code on the fly. After typing in the code you want to use, FIMS will open the Affiliation code table so you can add the new code. Be sure to check the Temporary box so you can easily remove this code from all Profiles when you're done. Once you've added the new code and saved,

you'll be asked for confirmation that you want to assign this new Affiliation code to all the profiles selected. Click Yes.

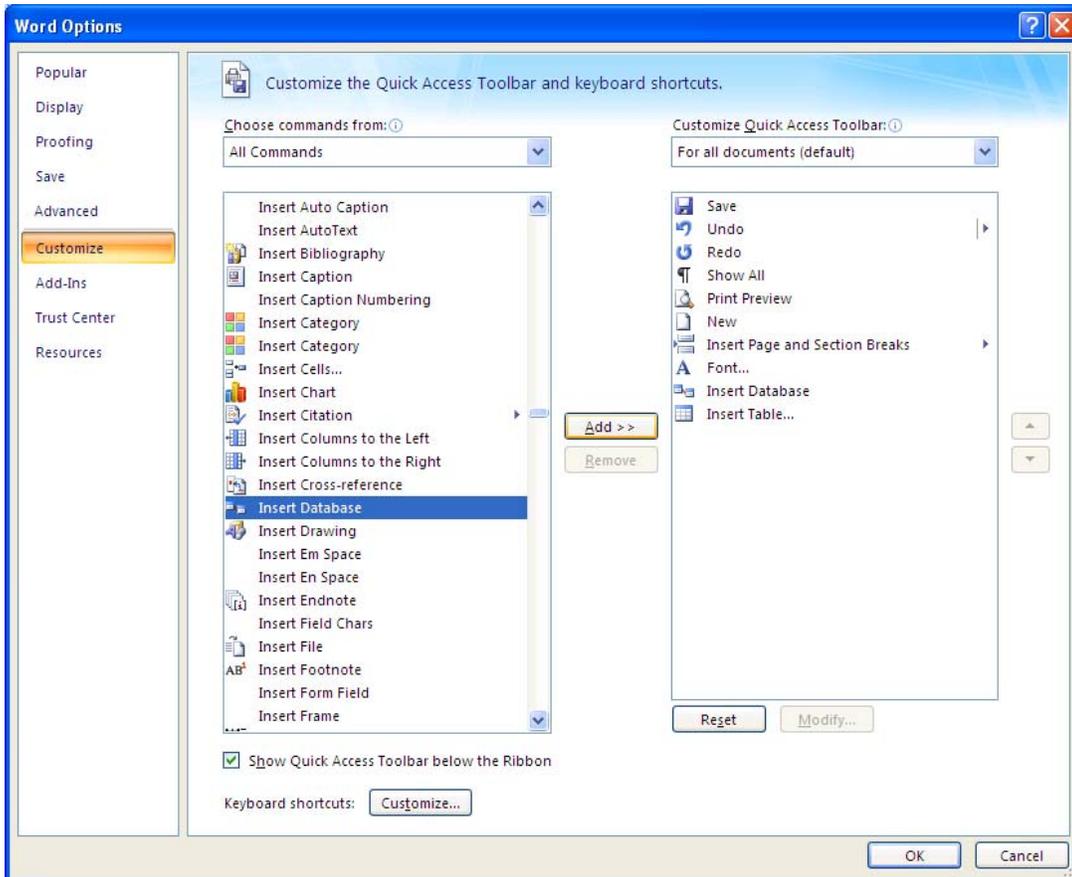
Step 2: Now run the Export to Word Processing Export selecting the Affiliation code you just assigned to all Grantees.

Now you have two exports: 1. Profile.txt (Export to Word Processing) that lists each of your Grantees only once. 2. App.txt (the Export Application Data or other Application export) that lists each of your Applications.

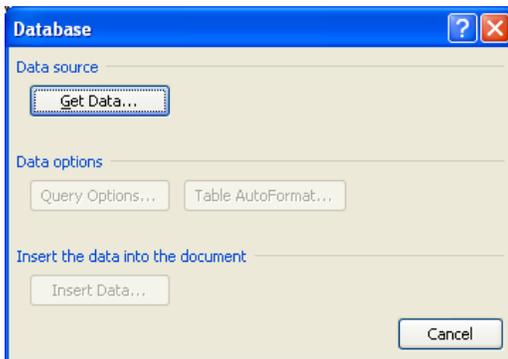
Step 3: Set up your merge template with the Insert Database code. **This step only needs to be set up once in your template so you can use it over and over.** This process will automatically place the list of Applications in a Table.

1. Open your existing letter template in Word. Do a Save As and rename so you don't update your existing template.
2. Turn on View Field Codes. (Alt-F9 is the keystroke)
3. Set up this new document as a mail merge but the Selected Recipients should be the Profile.txt file you just exported in Step 2.
4. Locate the Insert Database tool. **Note:** *MicroSoft removed the tool from the menu with Word 2007 but it is easy to find and add to your access toolbar. To locate it click on the Office Button (Windows Circle in upper left corner of Word) and click on Word Options at the bottom. Then click Customize on the left. In the Choose Commands From drop-down change it to All Commands. Find Insert Database (alphabetically listed). Click Add to move the icon to your access toolbar. See screen*

shot.



5. Click OK. This will take you back to your open template.
6. Place your cursor in the spot of your letter where you would like the Applications table.
7. Click the Insert Database icon (now located in the access toolbar at the top. This opens the Insert Database window.
8. Click **Get Data**. Browse for the app.txt file you just exported in Step 1 above.



9. Click **Query Options**. On the Filter Records tab use the dropdown below Field and choose **Grantee_IDcode**. The comparison is **Equal to**, and the Compare to needs to be an actual ID code of one of the Grantees in the file you just exported. If you're not sure, look back in FIMS or open the app.txt file in Excel. Later we'll change this one ID code to the Mergefield IDcode so it will change with each merged

letter.

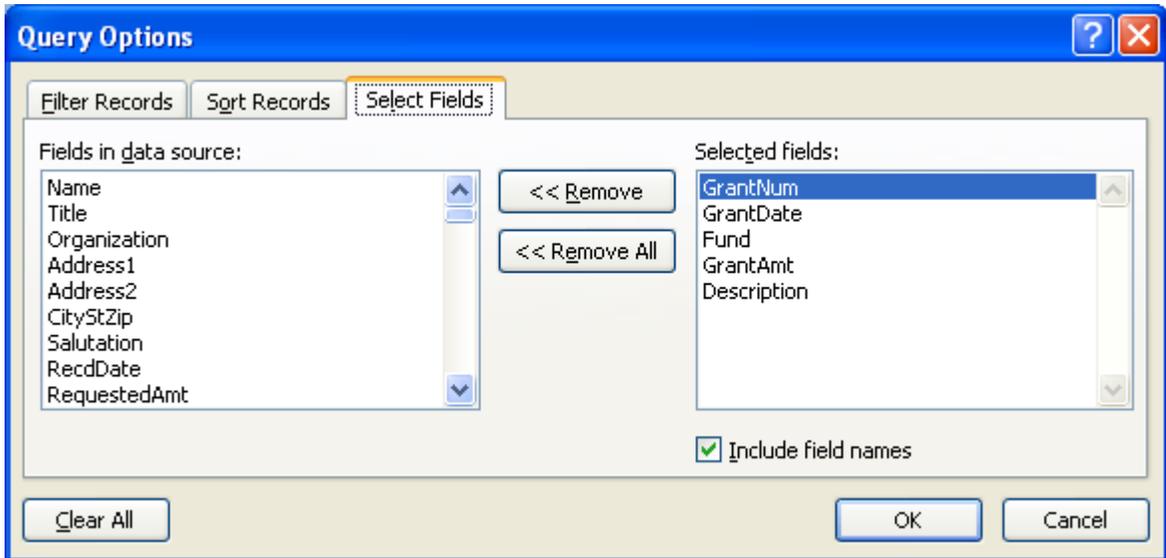
The screenshot shows the 'Query Options' dialog box with the 'Filter Records' tab selected. The dialog has three tabs: 'Filter Records', 'Sort Records', and 'Select Fields'. The 'Filter Records' tab is active, showing a table with columns for 'Field:', 'Comparison:', and 'Compare to:'. The first row is populated with 'Grantee_IDcode' in the 'Field:' column, 'Equal to' in the 'Comparison:' column, and '1177' in the 'Compare to:' column. Below this, there are four empty rows, each with a dropdown arrow in the 'Field:' column. To the left of the table is a dropdown menu currently set to 'And'. At the bottom of the dialog, there are three buttons: 'Clear All', 'OK', and 'Cancel'.

- Optional - Click the Sort Records tab if you would like to change the sort order of the Applications.

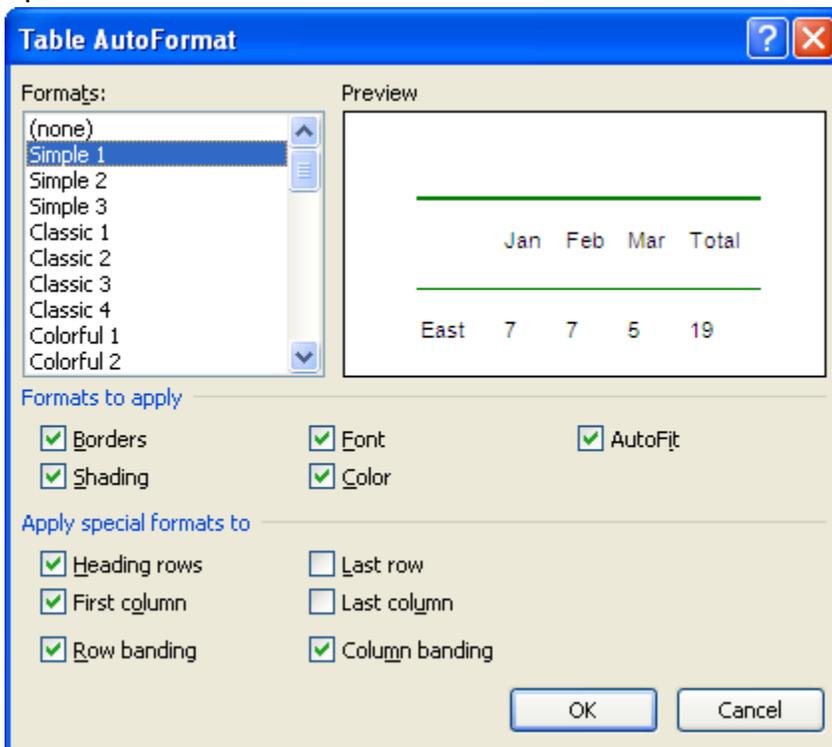
The screenshot shows the 'Query Options' dialog box with the 'Sort Records' tab selected. The dialog has three tabs: 'Filter Records', 'Sort Records', and 'Select Fields'. The 'Sort Records' tab is active, showing a 'Sort by' section with three rows. The first row has 'GrantDate' selected in the dropdown, with 'Ascending' selected as the sort order. The second and third rows have empty dropdowns and 'Ascending' selected. At the bottom of the dialog, there are three buttons: 'Clear All', 'OK', and 'Cancel'.

- Click the Select Fields tab to pick which fields to show in the table in your letter. Be sure to check the box Include Field Names if you want the title of each field listed as a column header. Click

OK.



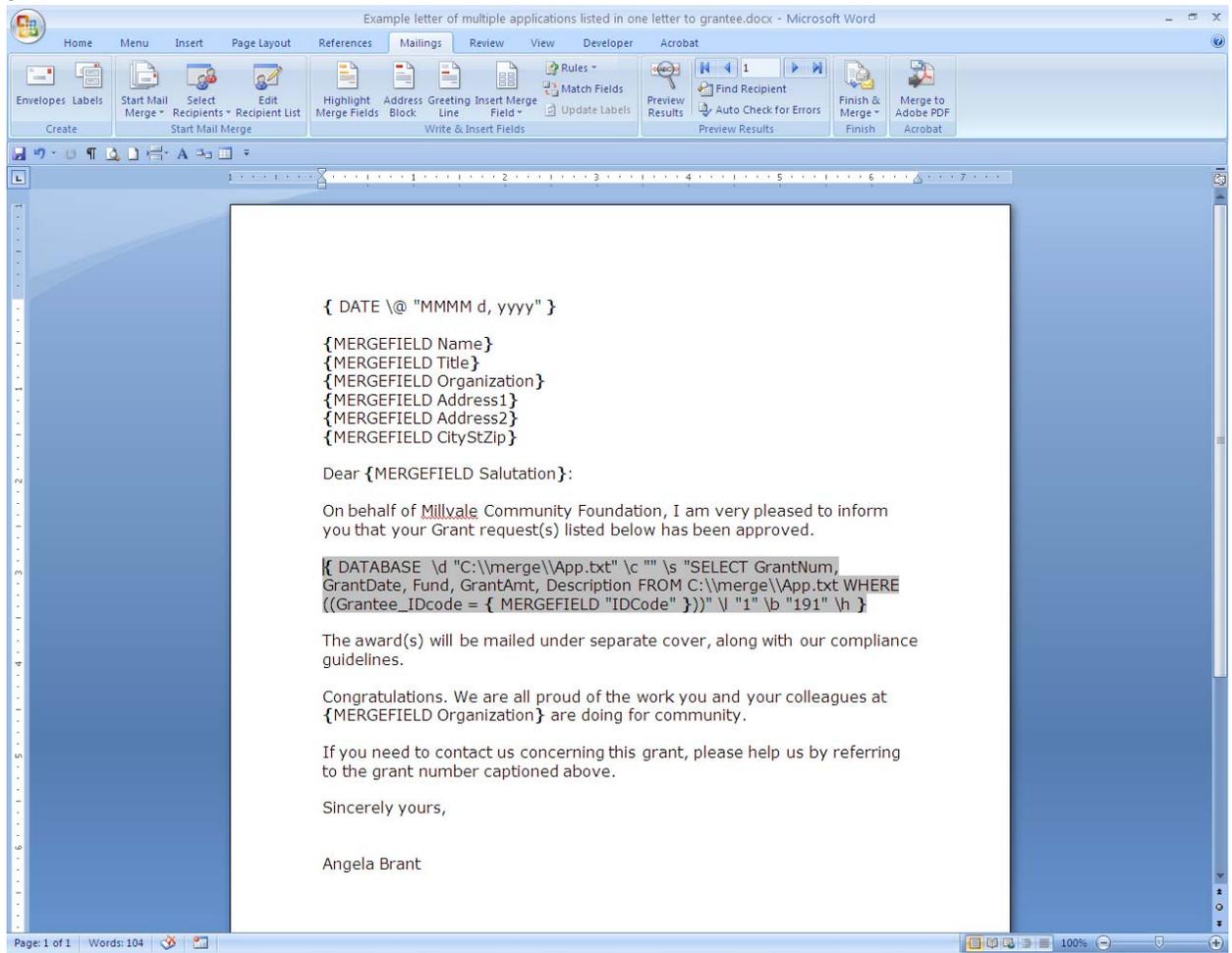
12. Click the Table Format button to open the Table AutoFormat window. You have your choice of table formats, choose one and any options and click OK.



13. Click Insert Data button to open the Insert Data window. Be sure All is selected and check the box **Insert data as field**. Click OK.



14. Find the Grantee_ID field in the code and carefully remove the specific ID code and use Insert Merge Field to insert the **MERFEFIELD "IDCode"**.
15. The Set up is complete. Your document should like similar to the screen shot below. Click Alt-F9 to turn off View Field Codes. Save your document.



Step 4: Merge as usual. You'll repeat Steps 1, 2 and 4 to merge your new letters. **Optional:** Use the Delete Temp Affiliation Codes to remove your temporary code from all Grantees.