

Chapter 6: Getting Data out of TntMPD

Overview

One of the many great features of TntMPD is the ability to use your data in other programs. There are five primary ways of using your TntMPD database *outside* of TntMPD itself:

1. Create a Mail Merge in Microsoft Word using a group of Contacts.
2. Create an Email Merge in Microsoft Word using a group of Contacts.
3. Export to Excel (or text) a group of contacts, a set of tasks or some other subset of data.
4. View your entire database to Access (that is, Link with Access). This is not “exporting” as the data is permanently linked with your TntMPD database.
5. Synchronize your database with Outlook.

Mail Merge

You can merge a letter to your ministry partners, or you can mail merge a thank you to a group of people from your task list.

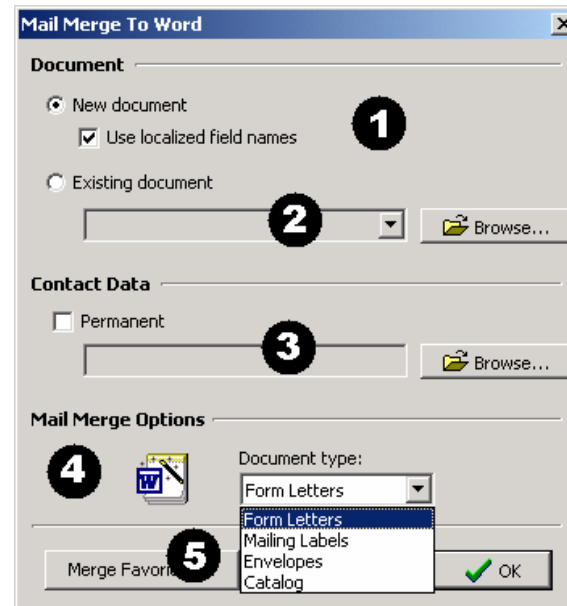
Using Mail Merge in TntMPD will be much easier if you are already familiar with using Mail Merge in Microsoft Word. Trial and error is the best way to learn this process, so be patient the first time you attempt this, and don't be afraid to try it a few times just to become familiar with the process.

Select **Tools | Mail Merge with Word | Create Mail Merge...**



Tip: The menu option “Edit Mail Merge Favorites...” brings up the same dialog box as the **Merge Favorites** button in the “Mail Merge To Word” dialog box (below). If you had Favorites, they would appear in a list below “Edit Mail Merge Favorites...”.

1. Merge to a **New Document** and TntMPD will automatically open Word and give you field options.
2. Merge to an **Existing Document** if you have already prepared your document and just want to add the merge data.
3. **Contact Data.** If you want to save the contact list (a .csv file) for later use, enter a filename here. Otherwise, TntMPD will create a temporary file and automatically delete it when you exit TntMPD.
4. **Mail Merge Options.** Choose what you want to create from the drop-down list.
5. **Merge Favorites.** Favorites are covered shortly.

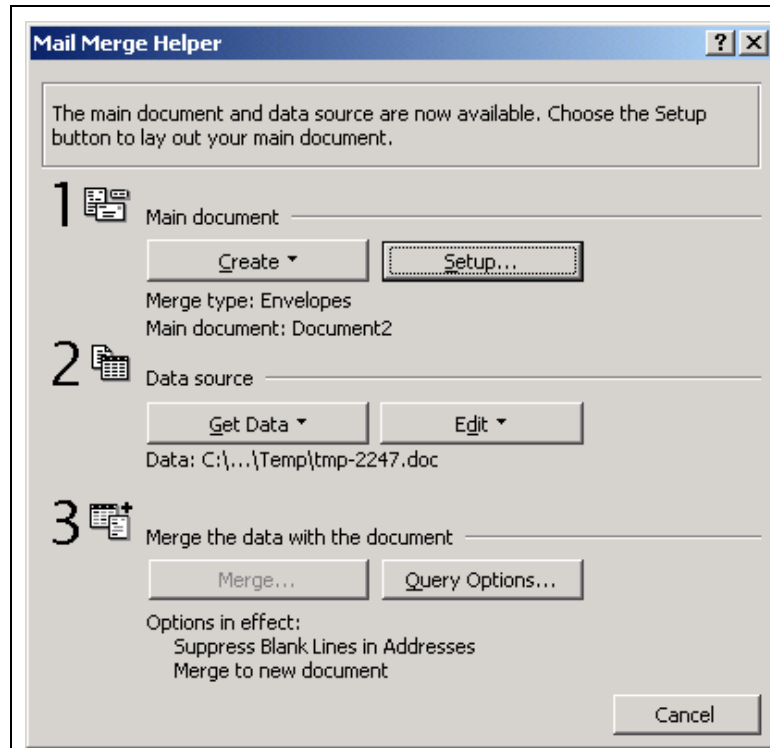


(“Localized field names” means that Word puts an underscore between words in a field name.)

MAIL MERGE TO A NEW DOCUMENT

If you selected “Form Letters”, you will automatically get a blank document. If you selected “Envelopes” or “Mailing Labels”, you will be taken to Word’s Mail Merge Helper.

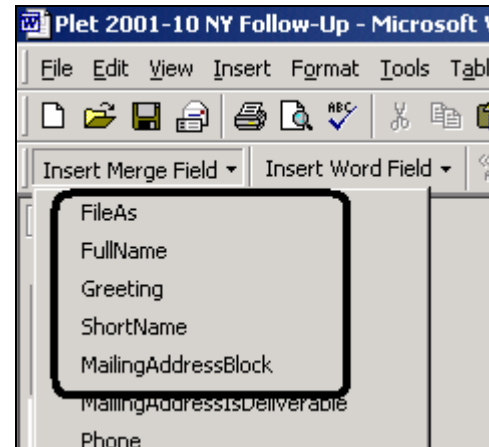
The **Mail Merge Helper** in Word helps you set up your envelopes or labels. Press **Setup...** to specify your envelope or label size.



MAIL MERGE TO AN EXISTING DOCUMENT

If you have already created your letter or envelope in Word, you can select to **Mail Merge to an Existing Document...**, browse for the file, and press OK. Word will then open the file and make it into a merge document.

- Position your cursor at the place in your document where you want the TntMPD field to go. For example, if it is a letter, put the cursor right after “Dear”, then press **Insert Merge Field** and select “Greeting”.
- If it’s an envelope, the “MailingAddressBlock” is the quick and easy way.



Tip: Remember that for envelopes, TntMPD will ignore the recipient’s Country if it is the same as the country you are mailing from. This is defined in the Tools | Options box.

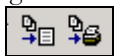
Note: If you are using Windows XP, the Mail Merge feature works a bit differently. Visit this link to see how the Mail Merge works with XP:

http://home.ccci.org/wolbrink/tntmpd/merge_with_word_xp.htm

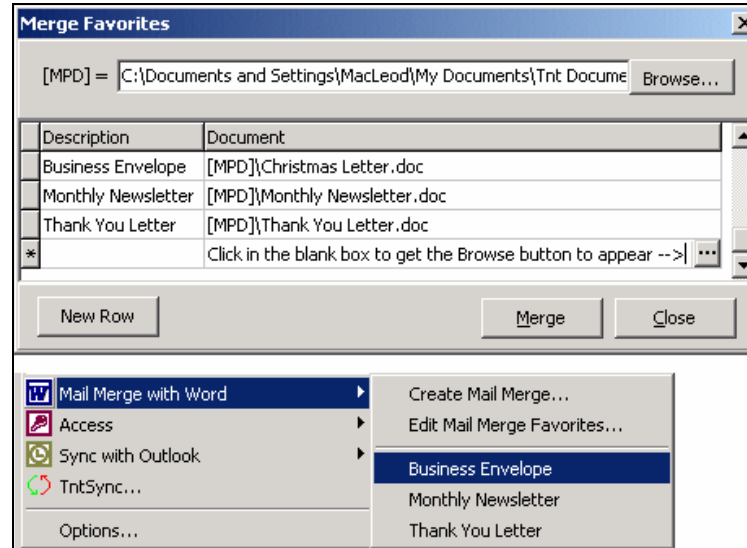
MAIL MERGE FAVORITES

Merge Favorites are a handy way to save documents you use repeatedly. A helpful feature with merge favorites is that when you select them, the Word document will show you the merged data for the last contact you were on in TntMPD. This way you can just hit “Print” to print the document for just the last contact you were on in TntMPD.”

To create a merged document (e.g., a monthly newsletter) for the entire group, you can then just press the Word button for “Merge to New Document” or “Merge to Printer”



- After you add some favorites to the list of Merge Favorites, they will show up right on your **Mail Merge with Word** menu.
- *Example:* You want to send a letter to thank them.
 1. Select the contact.
 2. Select Mail Merge with Word and then Thank You Letter.
 3. TntMPD will open that document in Word, showing you the merged data for the last contact you were on in TntMPD.
 4. To print the envelope, do the steps again but select the envelope file.



Tip: Selecting a favorite automatically opens the favorite document (“Business Envelope” shown above) and supplies the contacts as the data source. If you use a document frequently—like a thank you or an envelope—the Mail Merge Favorites can be a real time-saver.

Note from the Developer: Let me share how I use merge favorites, and why I love this feature. As you may know, Merge Favorites show up in my drop down list and simply refer to saved Word documents. (These documents are already set up to merge with TntMPD.) I have a Merge Favorite called “#10 Envelopes”. Whenever I want to create an envelope for someone, I just select “#10 Envelopes” from the drop down list, then in Word I just hit Print. A single envelope prints out to this person. If I want to print envelopes for the current group, I click on “Merge to Printer” in Word. So the merge favorites can be used to very quickly print a word document for either just the current contact, or for each contact in the current group. Some other favorites I have are “Reminder Letter”, “Precall Letter”, and “Meeting Directions”. (The “Meeting Directions” has the contact’s name/address/phone, notes, and many other fields. I print this before going on an appointment to have a hard copy of all the contact data for the appointment I’m going on.) This feature allows me to very quickly match a contact or group to a commonly used Word document.

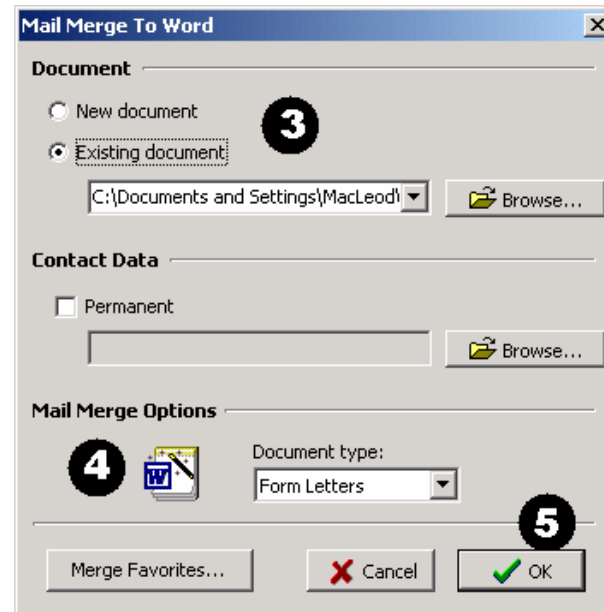
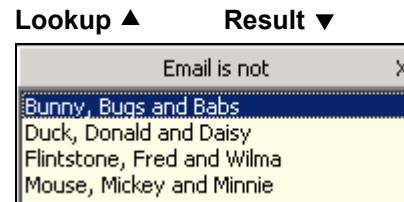
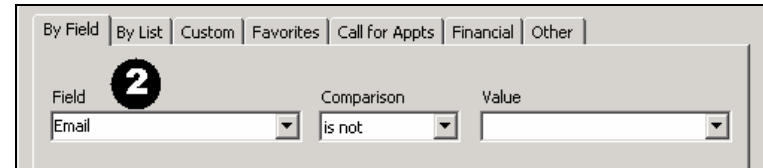
Mail Merge to Email

TntMPD uses Microsoft Word's mail merge features to create a merged email to your contacts.

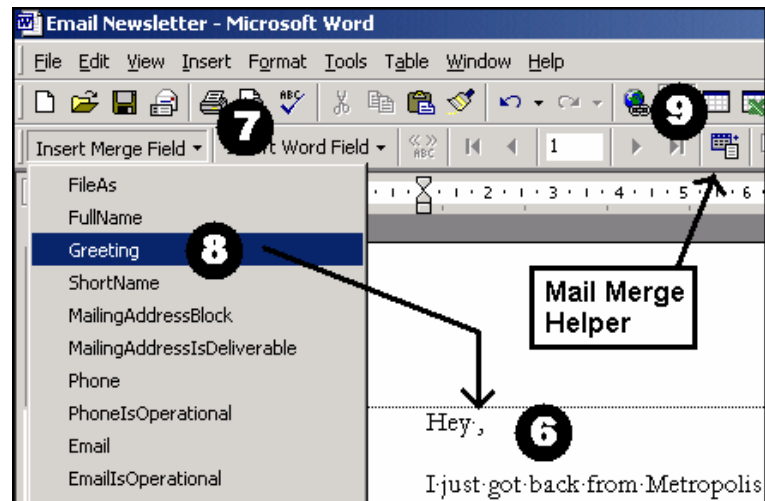
Word 2000 uses Outlook 2000 and Word XP uses Outlook XP to send email. You cannot use this feature with Outlook Express.

Steps to creating an email merge.

1. Create and save your email message text in a Word document (or you can create the document as you go).
2. In TntMPD, write a **By Field** lookup where the "Email 'is not' (blank)". See *example at right*. This will create a group of all the contacts who have an email address.
3. Select **New document** or **Existing document**.
4. Select **Form Letters** for the type of merge in the *Mail Merge Options* box.
5. Click **OK**. Microsoft Word will open the document and connect your data to the document.

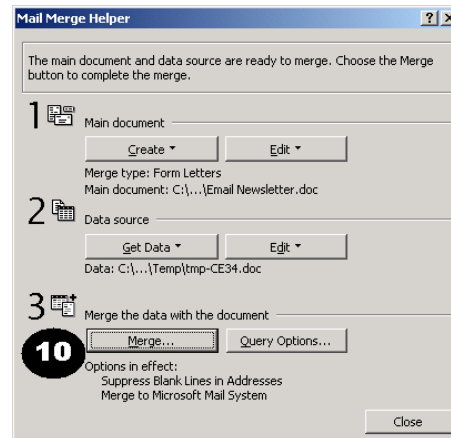


6. Place your cursor where you want the greeting to be placed.
7. Press **Insert Merge Field ▾**.
8. Select "Greeting".
9. Press the **Mail Merge Helper** button.



10. Press **Merge**. (Don't worry, this won't actually *run* the merge!) This will take you to the **Merge** dialog box where you will select electronic mail as the merge type and write the subject.

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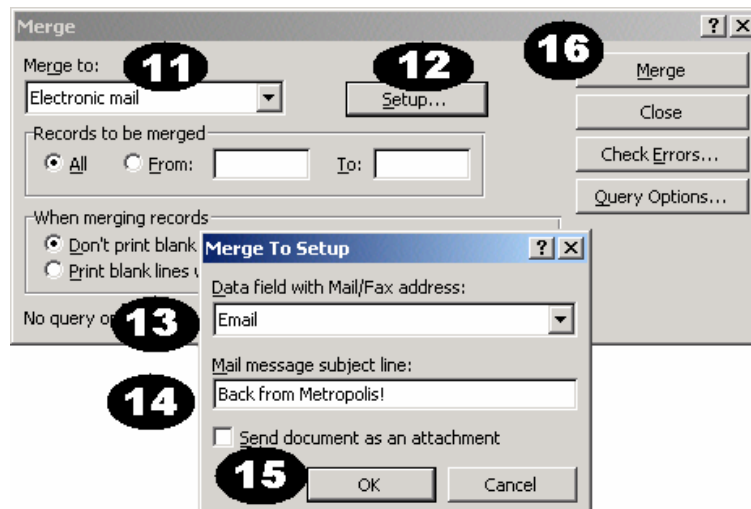
11. Select “Electronic mail” from the **Merge to:** drop-down box.

12. Press **Setup...**.

13. Select “Email” (the TntMPD email address field) from the **Data field with Mail/Fax address:** drop-down box.

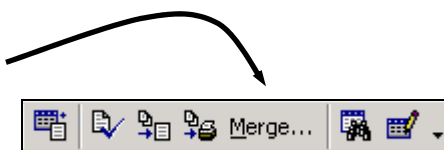
14. Write a subject line for your email message.

15. Click **OK**. *This returns you to the Merge box.*



Tip: Do not check “Send document as an attachment” unless you want your Word document to be sent as a file rather than as the message text.

16. Press **Merge** and off it goes! (Or, you can press **Close** and return to your document; then press the **Merge** button on the Mail Merge toolbar when you are ready.)



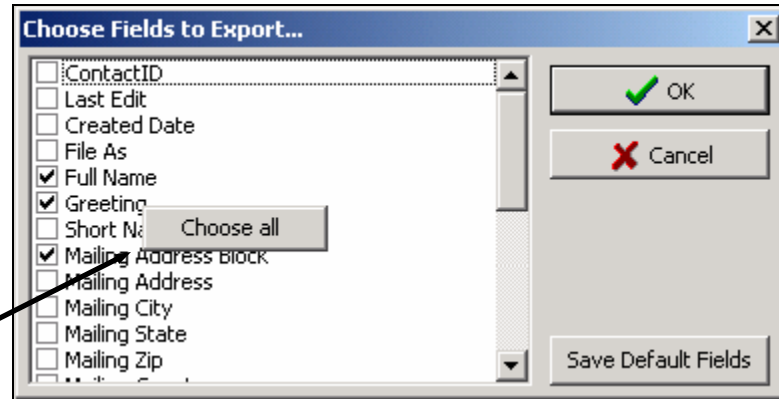
Export to Excel or Text

EXPORTING CONTACT INFORMATION

You can only export the entire group that is showing. If you want to export some of the contacts in the group, create a new lookup that will identify just those you want to export.

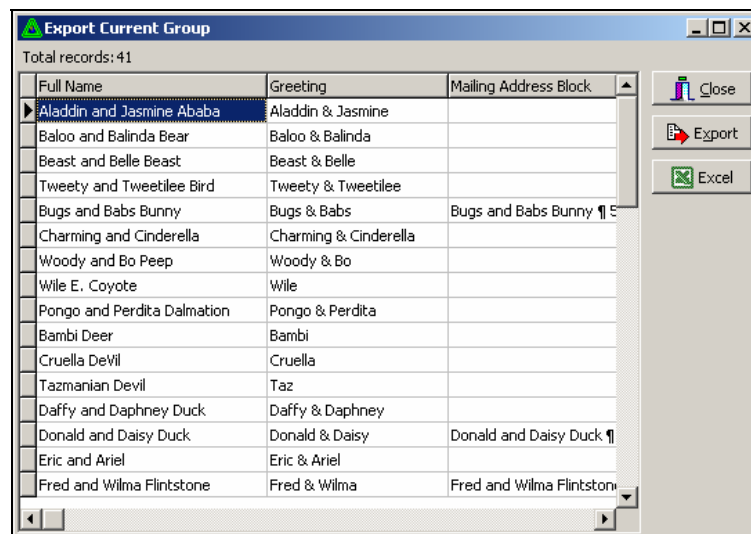
- Select **File | Export Current Group**.
- Select the fields you want to export. TntMPD defaults an assortment of common name & address fields. You can change those selections and press **Save Default Fields** to personalize your list of contact fields to export.

Tip: Right-click to "Choose all"

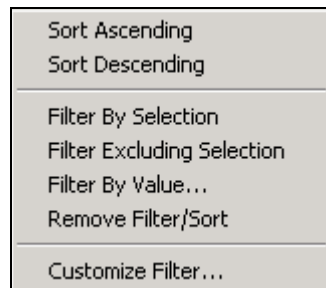


Tip: For the data obsessive, select a ton of fields and run the export. Then you can see what your data really looks like to TntMPD!

- TntMPD will create a table of the data which you then choose to export.
- Click **Export** to create a .csv text file. Comma-delimited (.csv) is the same format you use when *importing* contacts into TntMPD.
- Click **Excel** to send this table directly to Excel.



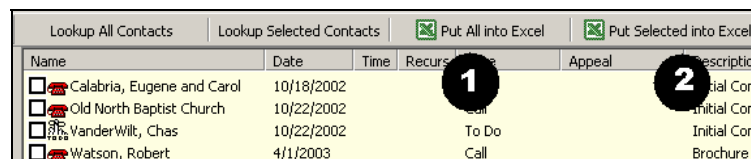
Tip: You can sort and/or filter this list by right-clicking in any column and selecting from the sort or filter options.



EXPORTING TASKS

You can select individual tasks by using the Shift and/or Control keys.

1. Press **Put All Into Excel** to get all the tasks into Excel.
2. Press **Put Selected into Excel** to get one or more selected transactions into Excel.



Tip: You can Export your contacts from the Task View
 Press **Lookup all contacts** (from the tasks view). This will bring you to the contacts view. Then, select File | Export Current Group. (The group should be obvious since you are in the contacts view.)

Linking your database with Access

For maximum data manipulation, you can link your database to Access. This section is not designed to be a thorough treatise on using Access.

WHAT YOU CAN DO IN ACCESS

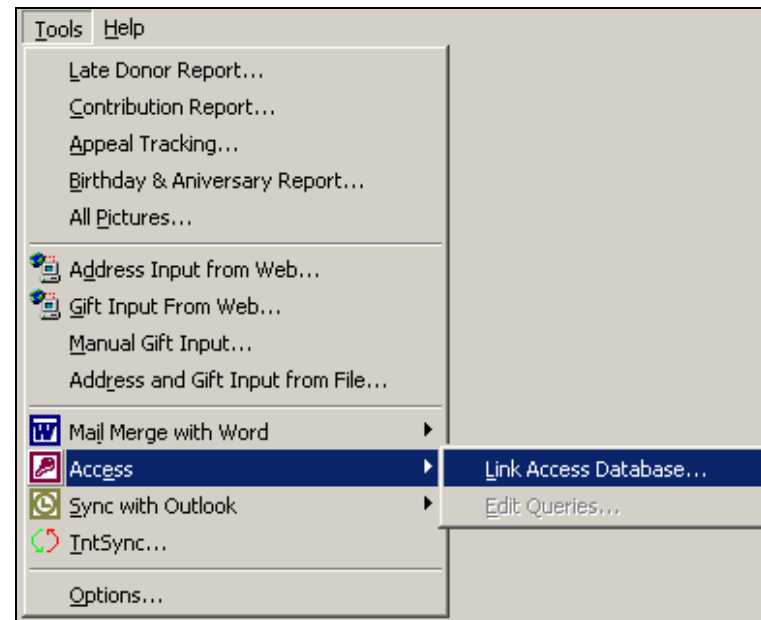
- View all your completed tasks in one place instead of having to look them up contact-by-contact.
- Tell your MPD coach how many phone calls or other tasks you have attempted and/or completed over a certain time frame beyond this week or last week (that information is available in the Analysis View).
- Make significant changes to your database more quickly than you can contact-by-contact in TntMPD. There are risks with modifying your data; see the warning below. Also, if you make changes to your database using Access, you should go to the **File | Maintenance** menu and press each of the **Recalculate** buttons to ensure the quality of your database.
- Get a list of all gifts on which you can do further analysis in Excel, such as # of gifts between certain dollar amounts, etc.

Warning: You can cause significant damage to your TntMPD database by manipulating it in Access. Be sure to create a backup copy of your TntMPD database before attempting to work with it in Access.

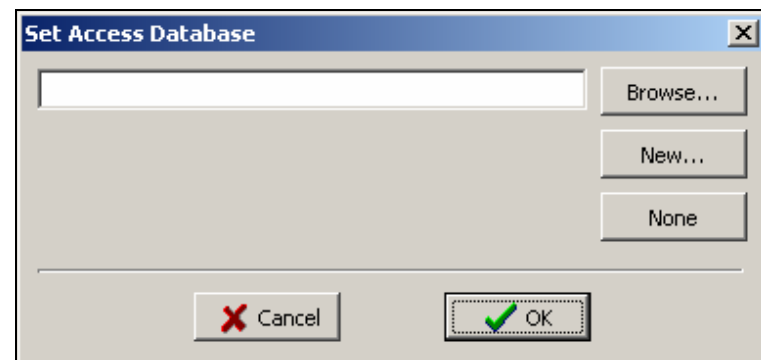


The Access button on the TntMPD toolbar.

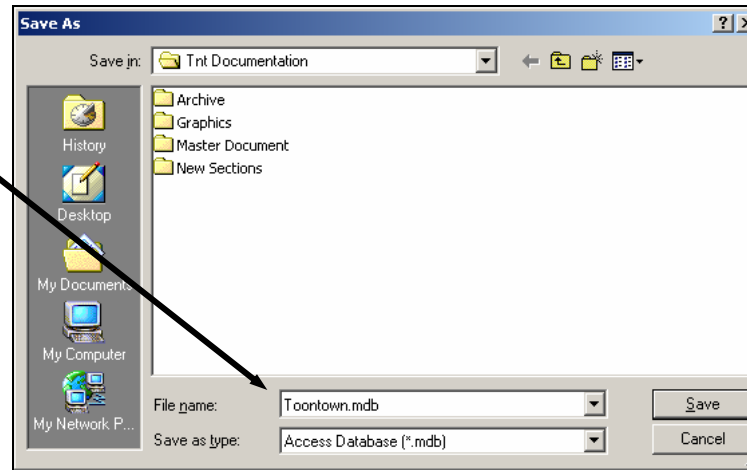
- Press the **Access** button on your button bar or select **Tools | Access | Link Access Database...** to begin the process.



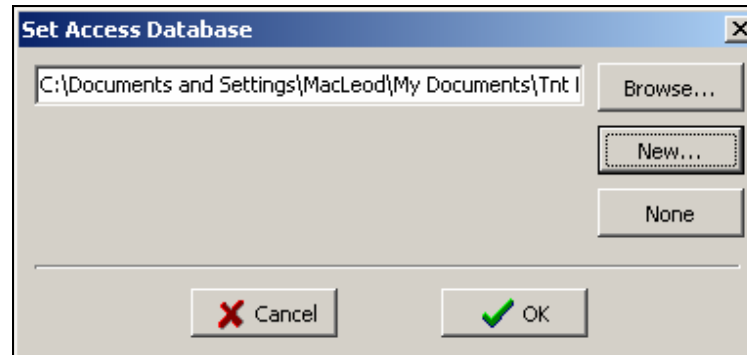
- Choose an existing Access database for linking or **Browse...** if you have one already. If this is your first time, press **New...**.
- **None** resets the filename box to blank.



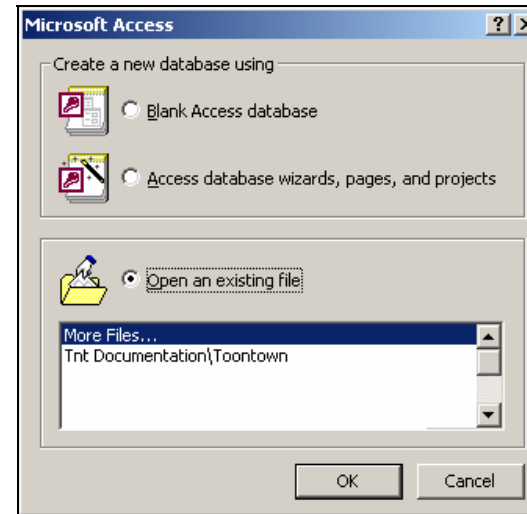
- Name your Access database.
- Click **Save**.



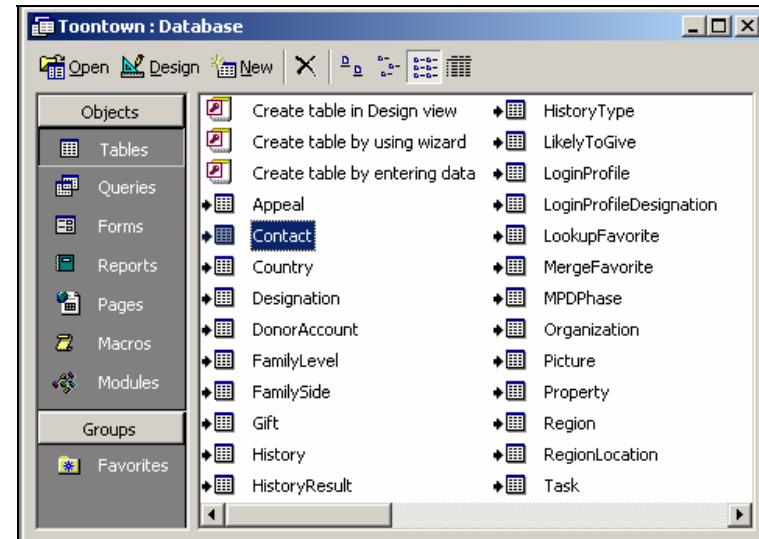
- The filename is created and posted in the name box.
- Press **OK**.
- You won't see anything really happen at this point, but TntMPD has created a link with Access so that you can work with the underlying data in Access.



- Open Microsoft Access
- Find your new Access database either by using **File | Open** or the Access “Startup Dialog Box” shown at right.



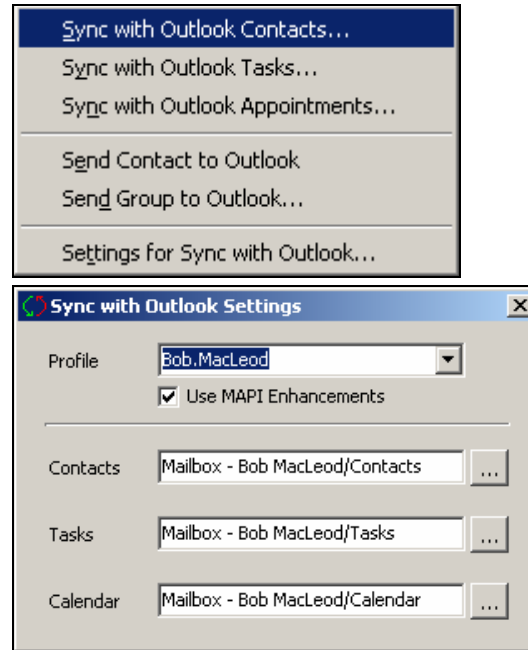
- You can select any table and open and edit the data on that table. The changes are **immediately** applied to your TntMPD database because accessing your tables via Access is like peeking directly into your TntMPD database.



Sync with Outlook

If you use Outlook as your personal information manager and/or email agent, then you want to avoid maintaining two sets of contact information. This is particularly true if you sync your handheld device with Outlook. Sync with Outlook allows you to export contacts, tasks, and schedule data to Outlook.

- From the **Tools | Sync with Outlook** menu you can choose which TntMPD activity to synchronize (contacts, tasks, or appointments).
- You can also send one individual contact to Outlook or an entire group.
- You can also define the settings for your Outlook synchronization.



CAUTIONS ABOUT SYNCHRONIZATION WITH OUTLOOK

Be cautious about synchronizing your TntMPD database with Outlook, particularly if the data in the two databases are different. For example, if you created your TntMPD contact database by downloading it from your ministry's website, there may be many differences between the contact

information in your Outlook and your TntMPD contact list.

When you Sync with Outlook, the TntMPD database will overwrite any information found in the Outlook for the same contact (if it can identify the contact).

