


Cegedim Healthcare Solutions Flash Card

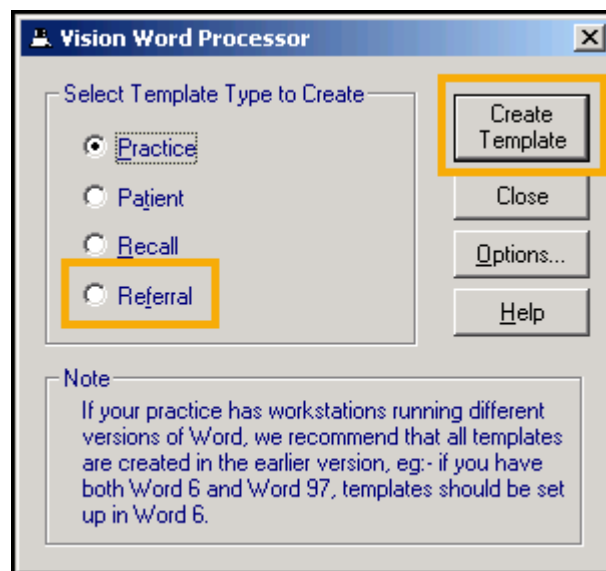
Creating a Mail Merge Document from a Document Received

Occasionally you may receive a Microsoft Word document that you need to create a **Vision 3** mail merge document from, for example, from your Health Board, or a local specialised service.

 **Note** - The incoming template must be an unprotected Microsoft Word document and cannot contain text boxes or frames, see [Microsoft Word Help](https://support.microsoft.com/en-us/word) (<https://support.microsoft.com/en-us/word>) for further details if required.

To turn a Microsoft Word document into a mail merge document within **Vision 3**:

1. Save the document to **p:\wordproc\template** and make a note of the name used.
2. Open **Vision 3** if you have not already and select **Utilities – Word Processor**.
3. The **Vision Word Processor** screen displays, select **Referral** and then **Create Template**:



4. Microsoft Word opens on your screen, select **File – Open**.
5. Navigate to where you saved the incoming document, highlight it and select **Open**.

6. Your document displays, either:



- Using the options available from **Insert Merge Field** add any data merges required, for example, Patient name, NHS Number, Address and depending on your settings in **Options**, various clinical merge options, or
- If **Insert Merge Field** does not display on your toolbar, select the



Mailings tab and from **Select Recipients** select **Use an Existing List**. Navigate to **p:\wordproc\template** and select the merge file required:

- **mmrefer.txt** – Restricted to referral merge options. This has the most options available, we therefore recommend using this option.
- **mmpract.txt** – Restricted to practice merge options.
- **mmrecall.txt** – Restricted to recall merge options.
- **mmpatnt.txt** – Restricted to patient merge options.

Now, place the merge option(s) where required in your document.

7. Once you have finished designing your mail merge template, select **File – Save As** and save the newly created template in **p:\wordproc\template** for **Vision 3** and **p:\wordproc\template\VA_Referrals** for **Vision Anywhere**.

Your template is now available for use.



See the [Word Processor Help in the Utilities Help Centre](#) for more details.