

# Lab 10: Integrating Office Tools

**Problem:** Last time in the Museum Gift Shop. Now we want to send letters to Vendors in which we order supplies that are getting low, and try to get a discount on that vendor's items.

## Instructions:

1. Open the “Lab 9 Museum Gift Shop.accdb” database.
2. Create a new query. This query is built from both the Items and Vendors table, and should include fields: [Vendor.Vendor Code], [Vendor.Vendor Name], [Vendor.Telephone Number], [Items.Item Number], [Items.Description], Needed: 20-[On Hand], [Items.Wholesale Cost], Total Cost: [Needed] \* [Wholesale Cost], and [Items.On Hand]. Turn off the “Show” attribute for the [On Hand] field, but set a criteria of <10 for that field. Sort the query on first, [Vendors.Vendor Code], and second [Items.Item Number]. The resulting query should have 7 items. Save this query as “Vendor Reorder Query”.
3. Save the Lab 9 Museum Gift Shop Database, and close Access.
4. Open Microsoft Word to create a blank document. Type in the following text, EXCEPT, do NOT type the data between the angle brackets. These will be added in a later step. And instead of *Your Name*, actually, type your name. Note that there is a tab after Needed:, and a tab after Wholesale Cost:.

To: Sales Manager - «Vendor\_Name»

Vendor Code: «Vendor\_Code»

Phone: «Telephone\_Number»

From: *Your Name*, Curator Museum Gift Shop

Ref: Item Number - «Item\_Number» - «Description»

Please send us the following quantity of the reference item so that we can keep our stock supplied and send a bill for the total charge.

Needed: «Needed»      Wholesale Cost: «Wholesale\_Cost»      Total: «Total\_Cost»

Note that based on the following statistics we have gathered at our Museum Gift shop, if you could give us a 5% discount on this item, we could increase the quantity of business done with you by about 10%, a win-win situation for both of us!

Save the resulting file as “Lab10 Template.docx”, but do not close Word yet.

5. Download and open the [Lab10 MGS sales.xlsx](#) spreadsheet. Create a scatter plot graph from the sales data that shows the relationship between the Retail Price and the quantity sold. Make the graph as compelling as possible without changing the data. Copy the entire graph from Excel and paste it at the bottom of the Word document. Paste the graph object itself – not a jpeg or PDF of the graph. Now close the Excel spreadsheet.
6. In Word, click on the “Mailings” tab on the ribbon. Click on the “Start Mail Merge” icon and select “Letters”. (You should only have to do the “Start Mail Merge” process once on the document. After that, Word should remember you are doing a letter mail merge.) Then click on the “Select Recipients” icon, select “Use an existing list...”, and navigate to your Lab 9 Museum Gift Shop.accdb Access database file. Once you open the Access database, you can select the “Vendor Reorder Query”.

7. Next, move your cursor to the place in your document where my example shows <<Vendor\_Name>>, but I asked you to leave blank. Then click on the “Insert Merge Field” icon, and select “Vendor Name”. Repeat this process for the other fields in the document. Put your cursor when the field should appear, click on the “Insert Merge Field” icon, and select the required field. Now your word document should look like the example in step 4 (except yours should have the Excel graph at the bottom.)
8. Type “Alt-F9” in the word document to toggle to “Field Code Display” mode. This will change all the angle brackets to curly braces, and put MERGEFIELD as a prefix before each of the field names. Move your cursor after “MERGEFIELD Wholesale\_Cost”, and before the right curly brace. Add a single space, followed by “\#\#\#0.00”. This tells Word to format this field as currency. Do the same thing for the Total Cost field. Then hit Alt-F9 again to toggle back to a normal view. (The formatting information you just typed will disappear, but it is still there.)
9. Click on the “Preview Results” icon to see how the first row in your Access table gets inserted into the template. If anything looks wrong, click on the “Preview Results” icon and modify the text. Then in Preview mode, scroll through different “recipients” to see how things look. When you are satisfied, save your Lab10 Template.docx file, but don’t close Word yet.
10. Now click on the “Finish and Merge” icon on the Mailings tab. Choose the “Edit Individual Documents...” option, select “All”, and click on the “OK” button. This will open a new Word document that has 7 pages, one for each item being reordered. Check through to make sure this looks correct, then save the result as “Lab10 Mailing.docx”.
11. Submit the Lab10 Mailing.docx file on myCourses.