

Using Word 2000 for Mail Merge

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Prerequisites

This document assumes that you are familiar with the use of a computer keyboard and mouse and have a working knowledge of Microsoft Windows

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About this Document

Words in bold	Will need to be typed or chosen from a menu or window
Small capitals – e.g. ALT	Indicate keys that you press
Press KEY1 + KEY2	Press both keys together
Press KEY1, KEY2	Press each key consecutively
Bulleted lists	Are guidelines on how to perform a task
Choose Insert - Picture	Show menu commands – in this case, choose the option Picture from the Insert menu at the top of the screen

1 Introduction

Objectives To introduce the main concepts and terms used in mail merge

Method

Activity 1.1 Mail Merge Structure

You may use Word's Mail merge function to produce standard letters or labels for sending to groups of people.

The mail merge itself is comprised of

- A main document – in effect, a template, that contains standard text that will not change on each letter or label and the markers to hold the information that will change – names, addresses and so on.
- A data source, containing the information to be fitted in to the main document. The data source must be a table of information, but whether that table is a Word document, an Access table or an Excel spreadsheet does not matter – you should store your information in whichever format suits you best.

When you run a merge you create a third document, which you should check and print but not save – the idea is to run the merge each time you want to run off labels or letters, so as to take account of any changes to the names and addresses in the data source.

2 Download files

Objectives Download some data to save us typing in names and addresses from scratch

Activity 2.1 Open Internet Explorer

We will download a data source in a variety of formats, to use later on.

- Open Internet Explorer
- Browse to www.bbk.ac.uk/ccs/docs/resources

You will see a list of files. You should save four of them to your n: drive.

- In turn, right-click on the files listed below

- Choose **Save Target As**
- Save the file to your n: drive
- Click **Close** on the popup window when the file has been saved

The files you need are

Mergedata.doc

Mergedata.mdb

Mergedata.xls

Mergetetter.doc

3 Create mailing labels from a Word data source

Objectives To create a template which links to our data source

Method Use Word's Mail merge function to define the main document and the data source

Activity 3.1 Create a main document

- Open Word (under Start – Programs)

Mail merge options are accessible from the Tools menu

- Choose **Tools – Mail Merge**

The window shown in Figure 3-1 will appear.

First we must decide what sort of document to create

- Click on **Create** and choose **Mailing Labels** from the list

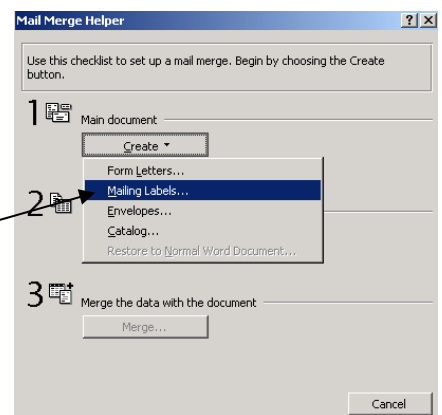


Figure 3-1

Word will now ask if you want to use the active window or a new main document, as in Figure 3-2. The active window is the current document, clicking new will start a new, blank sheet. In this case it does not matter which you choose.

- Click **Active window**

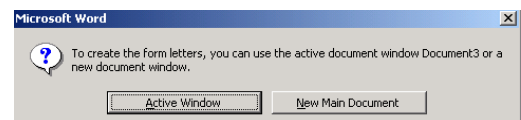


Figure 3-2

Activity 3.2 Select the data source

We now need to tell Word where our data is kept. We have downloaded three potential sources – all containing the same information – and will use the Word document.

- Click on **Get Data**
- Choose **Open data source**

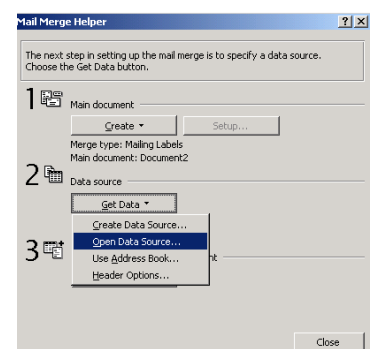


Figure 3-3

You should now tell Word which document contains the merge

data – this screen works in just the same way as if you were opening a file.

- Browse to wherever you saved the documents you downloaded above (probably your n: drive)
- Double click on **mergedata.doc** (or single-click and choose open if you prefer)

Activity 3.3 Set up the main document

Word prompts you to set up the main document.

- Click **Set up main document**

The window shown in Figure 3-4 now pops up.

- Choose a label size

Note that to use the common Avery label sizes, L716x, you should choose "Avery A4 and A5 sizes" from the drop-down menu

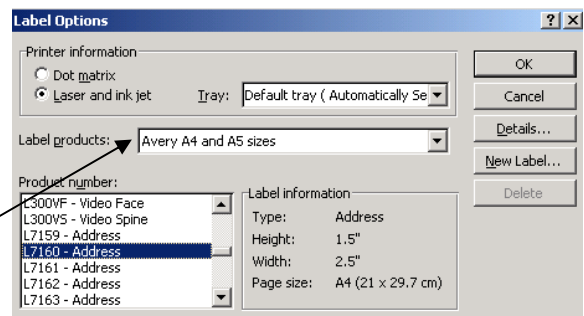


Figure 3-4

- Once you have chosen your label, click **OK**

Activity 3.4 Add merge fields

The Create Labels window pops up

This screen allows you to lay out your label – including all necessary spaces, line breaks, standard text and so on.

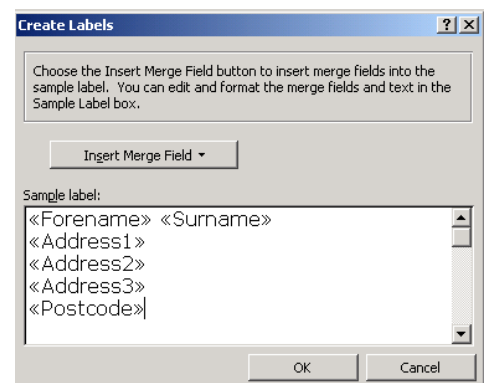


Figure 3-5

- For each item of information to appear on the label, click "Insert Merge Field" and select the field from the list
- Add each field to the label, making sure you press RETURN and SPACE where appropriate, as in Figure 3-5
- Click **OK** when you have finished

You have now set up the mailing label and it can be merged. However, for now we will just have a look at the document itself.

- Click cancel on the Mail Merge Helper window

Word creates the merge main document, with each merge field marked by << >>, as in Figure 3-6

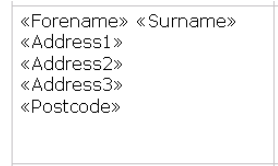


Figure 3-6

This is your main document, which should be saved.

- Save this document onto your n: drive as **Mailing labels.doc**

Activity 3.5 Create the labels

From this main document we may now produce a third document, with the various names and addresses filled in.

- Choose **Tools – Mail Merge**
- Click **Merge**

The Merge window appears, as in Figure 3-7.

From here, you may merge the document straight to a printer, but it is a good idea to check it first, in case of errors.

- Use the drop down to merge to "New Document"
- Click **Merge**

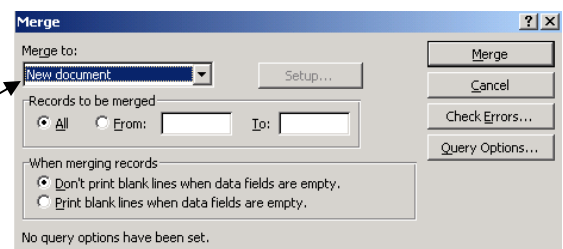


Figure 3-7

A document – **labelsx.doc** – is produced with labels for John Hearn – Brian Russell

This is the document ***you would not save*** as it has been generated from information which may change before you next need to produce the labels again.

- Close **labelsx.doc** and do not save it

Your main document is saved and, so long as it and the data source (mergedata.doc) still exist, can be used to produce labels as often as necessary.

4 Edit the Data source

Objectives To change the data contained in the merge, and check that the updated information is included on the labels

Activity 4.1 The data source structure

The data source we used in the above example is simply a word document with information contained in a table.

- Open **mergedata.doc**

There are a few rules if you are to produce a mail merge data source. The document

1. should be a table, with no other formatting
2. the top of the document should be the top row of the table – do not include a heading or other text before it
3. the top row of the table should contain headings. These become the “merge fields” we used above

Activity 4.2 Add a record

- Scroll to the end of the document
- Add a new record with your own information

(to add a new line to a word table, click into the last cell and press the TAB key)

- Save and close the document

Activity 4.3 Testing the mail merge

We will run the original merge again and check that the new record appears in the results.

- Open your document, **Mailing Labels.doc** – you should find it listed at the bottom of the File menu, which lists the most recent files opened
- Choose **Tools – Mail Merge**
- Click **Merge**
- Click **Merge** again

Check that your address appears on the list that is produced – it will be at the end.

- Close and do not save the generated document, **labelsx.doc**

5 Sort the Mail merge alphabetically

Objectives To sort the generated document into alphabetical order

Activity 5.1 Query options

The individuals in the mail-merged documents we have produced so far have appeared in the same order as in the data source. It might be more useful to put them in alphabetical order.

You could simply sort the data source alphabetically. That would work, but necessitate you sorting the information every time you added a new record. We will make Word sort the information as it merges the document.

- Use the tabs at the bottom of the screen to return to Mailing Labels.doc (or open it again if you have closed it)
- Choose **Tools – Mail Merge**
- Click on Query Options (note that this button is still available when you click “Merge”)

We will use the filter records option in a moment

- Click on the **Sort Records** tab, as in Figure 5-1
- Use the drop down to sort by Surname

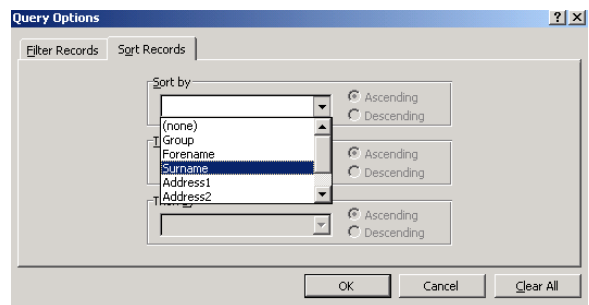


Figure 5-1

- Click OK

You are returned to the Mail merge helper window

- Click **Merge**
- Click **Merge** again

The labels are produced, and sorted alphabetically

- Close and do not save **labelsx.doc**

6 Filter the records to be merged

Objectives To filter the mail merge document so as to use only some of the names and addresses in the data source

Activity 6.1 Query options

As you may have noticed in the example above, Word's query options contain the option to filter the data.

You may filter by any field contained in your data source, though it will generally make sense to add a field (a column of the data source) specifically for this purpose – that field need not appear on the final, merged document.

- Use the tabs at the bottom of the screen to return to Mailing Labels.doc (or open it again if you have closed it)
- Choose **Tools – Mail Merge**
- Click on Query Options

On the Filter records tab you may specify which field to use, and what the criteria should be. Our data source uses the field "Group", with each record classified as either "friend" or "colleague"

- Use the drop-down to specify the field **Group**
- Type the text **friend** into the **compare to** box, as in Figure 6-1
- Click OK

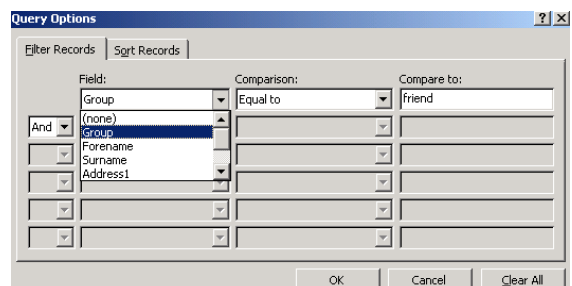


Figure 6-1

You are returned to the Mail merge helper window

- Click Merge
- Click Merge again

Labels are produced for those people listed in the data source as "friends".

Note that Word has preserved the sort option we specified above, and the records are again sorted alphabetically.

- Close and do not save **labelsx.doc**

7 Merge to a Letter

Objectives To produce a mail merged letter from our current data source

Activity 7.1 Set up the letter

We will use the letter document downloaded earlier to produce merged letters. The process is similar to setting up labels.

- Open the document mergeletter.doc

This short letter will be our mail merge main document.

- Choose **Tools – Mail Merge**

The mail merge helper window pops up

- Click on the **Create** button and choose **form letters** from the menu

The next dialogue box is crucial – we do not want to start a new document, since our letter is already typed.

- Choose **Active Window**

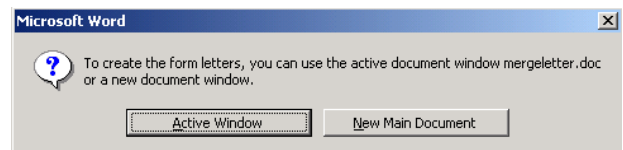


Figure 7-1

Activity 7.2 Choose the Data Source

We now need to link the letter to a data source. We will use the same document as in previous exercises.

- Click on the **Get Data** button and choose **Open Data source** from the menu
- Open the document **mergedata.doc** from your n: drive

Word warns that there are no merge fields in the main document, as in Figure 7-2. We will add some.

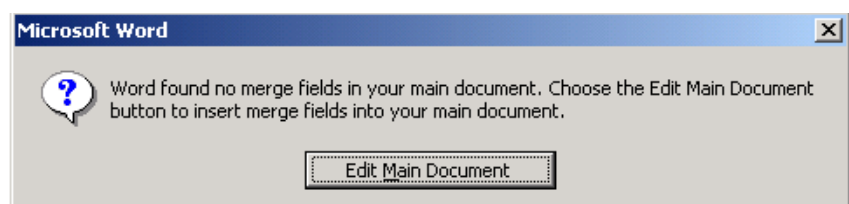


Figure 7-2

- Click **Edit Main Document**

Activity 7.3 Add merge fields

You should see an extra toolbar at the top of your screen, as in Figure 7-3

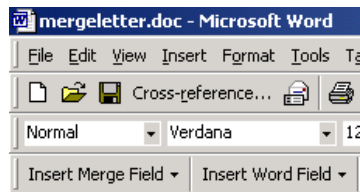


Figure 7-3

To insert merge fields, click to place the cursor at the correct place in the document, and choose the field to insert from the **Insert Merge Field** menu.

- Insert merge fields into the document, remembering to leave space between fields as appropriate.

«Forename» «Surname»
«Address1»
«Address2»
«Address3»
«Postcode»

The finished document should look something like Figure 7-4

- Save the document

Dear «Forename»,

Thank you for attending Mark's r
glad everything went to plan on
help. As a valued «Group» of M.

Figure 7-4

Activity 7.4 Produce the merged document

Finally, we need to generate a document with the data inserted in the relevant places on the letter.

- Choose **Tools – Mail merge**
- Click on **Merge**
- Click **Merge** again

A new document is created, with information filled in. If there are any errors – e.g. no space between <<forename>> and <<surname>>, you should fix them on the mail merge main document – close and do not save the generated one, make the changes and then re-run the merge.


- Close and do not save **form letters x.doc**

8 Merge from an Excel Spreadsheet

Objectives To produce labels as before, but using an Excel spreadsheet as the data source

Activity 8.1 Set up the document

Producing the main document follows the same pattern as before, with just the data source being different.

- Close and save any mail merge main documents or data sources that are open in Word
- Start a new document (CTRL+N or click the  icon at the top left of the screen)
- Choose **Tools – Mail Merge**
- Click on the **Create** button and choose **Mailing labels** from the drop-down list
- On the window that pops up, click on the **Active Window** button (which will make the current, blank, document our main document)

Activity 8.2 Choose the data source

We now need to tell Word which data source to use. We use the same menu as before, but need to tell Word to look for Excel spreadsheets.

- Click on the **Get Data** button
- Choose **Open Data source** from the menu

You should now choose the excel spreadsheet we downloaded earlier, **mergedata.xls**, as the data source. It will not, however be shown in the list, as Word automatically shows only Word documents;

- At the bottom of the Open Data Source window, change the files of type setting to MS Excel Worksheets, as in Figure 8-1

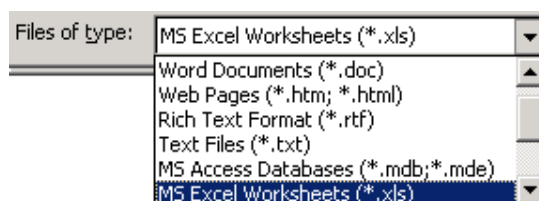


Figure 8-1

- Double click on the file **mergedata.xls** to make it the data source (you may single-click and choose open if you prefer)

Word will open Excel and the chosen spreadsheet in the background – this may take a few seconds.

The window shown in Figure 8-2 will appear. For a more complicated spreadsheet there might be several options, but for our purposes there is only the one.

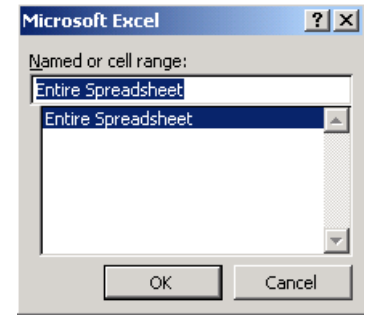


Figure 8-2

Word may take several seconds to set up the link with Excel

Activity 8.3 Set up the labels

The rest of the exercise is the same as that completed above.

Word prompts us to set up the main document, as in Figure 8-3

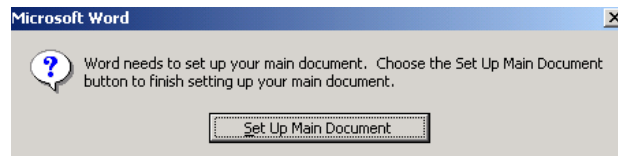


Figure 8-3

- Click the **Set Up Main Document** button

Again, you should choose a label size from the window that appears – remember that for common Avery sizes you may need to choose “Avery A4 and A5 sizes” from the drop-down menu

- Choose a label size and click OK
- As before, click on the **Insert Merge Field** button to insert each field, adding space and line breaks as required until your label looks something like Figure 8-4

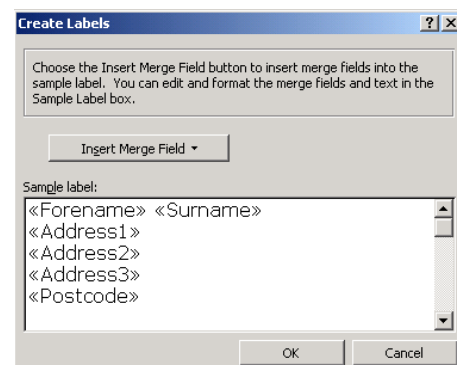


Figure 8-4

- Click OK

Now we may run the merge to produce the labels.

- Click Merge
- Check that Word will merge to a new document, as in Figure 8-5, and click Merge again

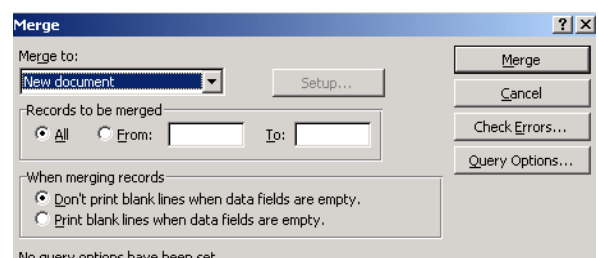


Figure 8-5

Word will produce labels, just as it did from the Word document data source.


- Close and do not save the generated document, **labelsx.doc**
- Save and close the main document, **documentx.doc** as labels from **excel.doc**

9 Merge from an Access database

Objectives To produce labels as before, but using an Access database as the data source

Activity 9.1 Set up the document

Producing the main document follows the same pattern as before, with, again, just the data source being different.

- Close and save any mail merge main documents or data sources that are open in Word
- Close Excel, if it is still open
- Start a new document (CTRL+N or click the  icon at the top left of the screen)
- Choose **Tools – Mail Merge**
- Click on the **Create** button and choose **Mailing labels** from the drop-down list
- On the window that pops up, click on the **Active Window** button (which will make the current, blank, document our main document)

Activity 9.2 Choose the data source

The next step is to select the data source. Again, we use the Get data button, but must tell Word which type of file to use.

- Click on the **Get Data** button
- Choose **Open Data source** from the menu

Word shows only Word documents in the list;

- Next to Files of type, at the bottom of the window, use the drop down menu to choose MS Access Databases, as in Figure 9-1

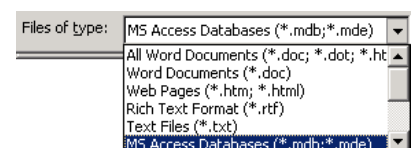


Figure 9-1

You should now see the database downloaded earlier, mergedata.mdb, in the list of files – if not, browse to wherever on N: you saved that file.

- Double click on the file **mergedata.mdb** to make it the data source (you may single-click and choose open if you prefer)

Word will now open Access and the database in the background. It checks to see which tables exist in the database, allowing you to use any of them as your data source. In this case, there is only one table in the database.

- The window shown in Figure 9-2 appears
- As there is only one table in the database, it is already selected – click **OK**

Word may take several seconds to set up the link with the Access table

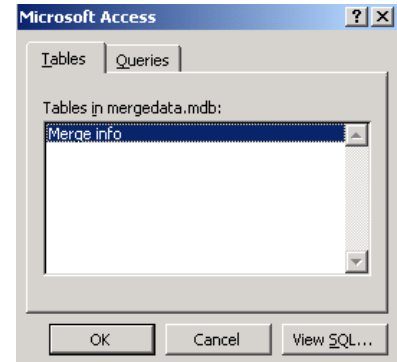


Figure 9-2

Activity 9.3 Set up the labels

The rest of the exercise is the same as that completed above.

Word prompts us to set up the main document, as in Figure 8-3

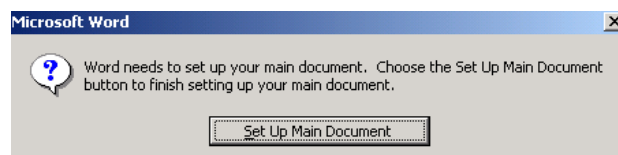


Figure 9-3

- Click the **Set Up Main Document** button

Again, you should choose a label size from the window that appears – remember that for common Avery sizes you may need to choose “Avery A4 and A5 sizes” from the drop-down menu

- Choose a label size and click **OK**
- As before, click on the **Insert Merge Field** button to insert each field, adding space and line breaks as required until your label looks something like Figure 8-4

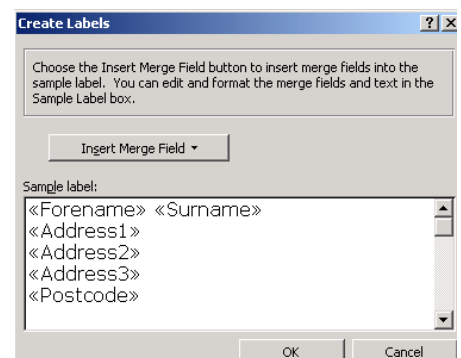


Figure 9-4

- Click OK

Now we may run the merge to produce the labels.

- Click Merge
- Check that Word will merge to a new document, as in Figure 8-5, and click Merge again

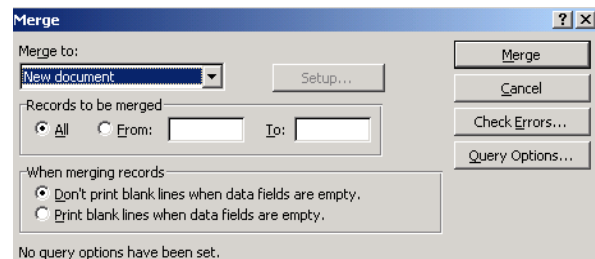


Figure 9-5

Word will produce labels, just as it did from the Word document data source.

- Close and do not save the generated document, **labelsx.doc**
- Save and close the main document, **documentx.doc** as **labels** from **excel.doc**