Using Word 2003 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

Contents

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

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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

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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
Mergeletter.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 – Letters and Mailings – Mail Merge**

The window shown in Figure 3-1 will appear, asking us what type of document we are going to create

- Click on **Labels** to select that option
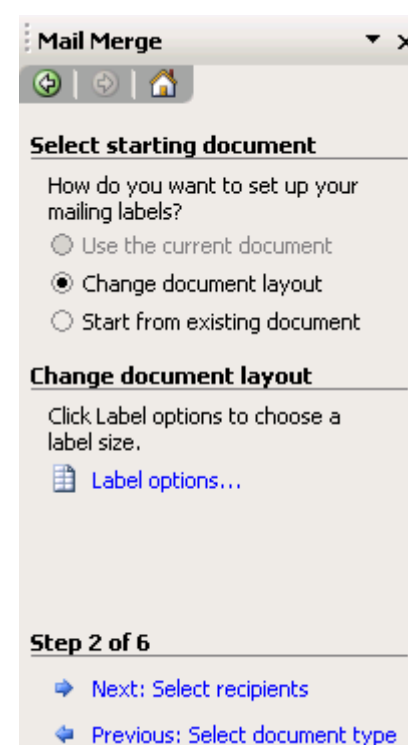- Click on Next: Starting document to continue to the next stage

Figure 3-1

Activity 3.2   **Choose label size**

The window should now change as in Figure 3-2 – if not, click next again.

- Click on **Label options**

Word has many of the most popular label types pre-installed. Note that to find Avery labels, you may need to change the "Label Products" to Avery A4 and A5 sizes, as in Figure 3-3
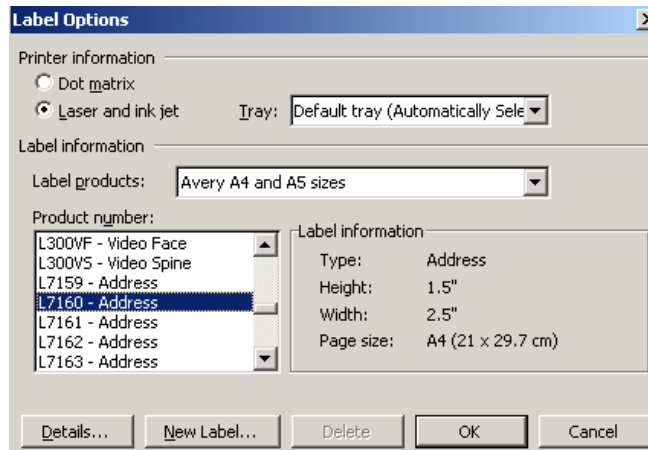
Figure 3-2

- Pick a label size

- Click OK

- Click Next: Select recipients

Figure 3-3

Activity 3.3   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.

- The settings shown in Figure 3-4 are fine – we are using an existing list
- Click **Browse**
- Use the drop-down to browse to wherever you saved the documents we downloaded earlier
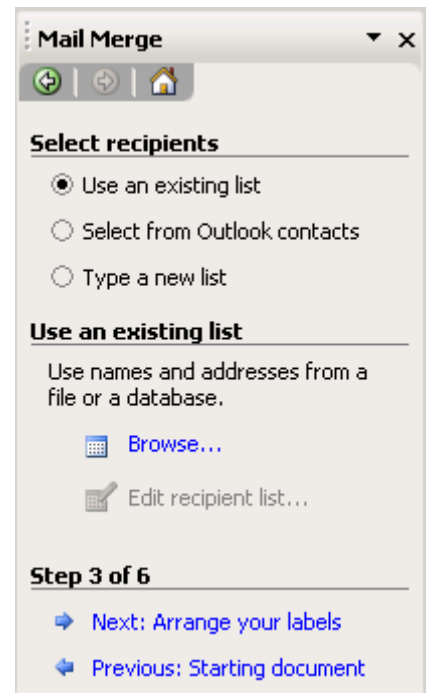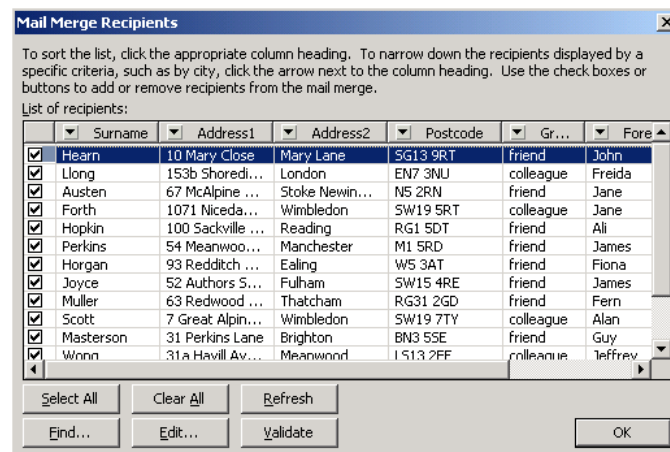- Double click on **mergedata.doc** (or single-click and choose open if you prefer)

Figure 3-4

The first few recipients are shown – note that you may use this screen to remove people from the mail merge

- Click **OK**

- Click on **Next**: **Arrange your labels**

Figure 3-5

Activity 3.4   Layout the labels

The next step is to tell Word where to place each individual item

of data from the data source on the labels. Word will try to group any address and addressee fields together so as to make it easier.

- Click on **Address Block**

The popup window allows you to check where each field will appear on the label

- The box at the top allows you to select a different format for recipients' names
- The Match fields button allows you to check that Word has picked out all fields containing address information (of particular use if any of your fields have an unusual name)

- Click on **Match fields**

  Match Fields...
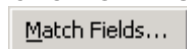
Word has found the Surname field, but not that for First name
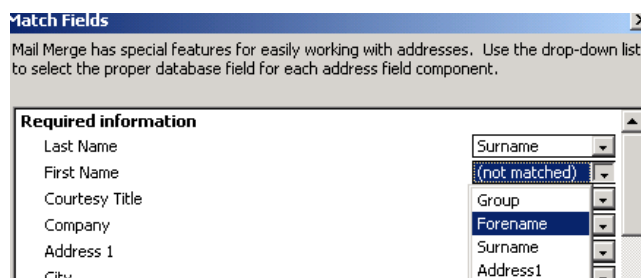

Figure 3-6

- Use the drop-down to tell Word to use the Forename field as First Name, as above
- Use the drop-down to tell Word to use the Address3 field as City
- Click **OK**
- Click **OK**

That has setup only the first label – it is important that you now click the Update all labels button, as in Figure 3-7

Figure 3-7

Activity 3.5   **Preview your Labels**

The mail merge is now set up, we may now see the labels with details filled in.

- Click **Next: Preview your labels**

You will see name and address details from the data source within the main document.

At this point you may use the **Previous:** link to go back if you have missed out any fields.

- Click **Next: Complete the merge**

The two options here allow you either to Print the merge, or to create a new, separate document (**Edit individual labels**)

Whichever you choose, Word will ask which records you wish to include in the final document that is produced.
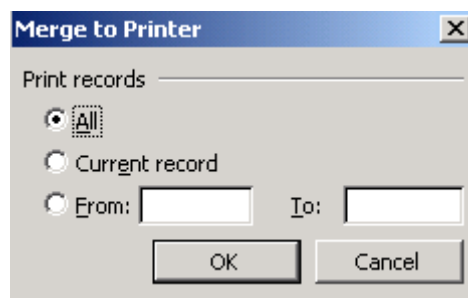
Figure 3-8

Usually you will want all records and can thus click OK

Figure 3-9

Activity 3.6   **Final Steps**

Once you have printed the document, it is important to remember that you should save the main, original, document.

If you click on **Edit individual labels**, a document called Labelsx.doc will be created. This document may be printed, but should not be saved if your data source will change as it is a snapshot of the data – any new additions will not be added.

- Save the main document as Mailing Labels.doc

On clicking Save, you may see a message asking if you want to save the data source as well, as in Figure 3-10 – click Yes
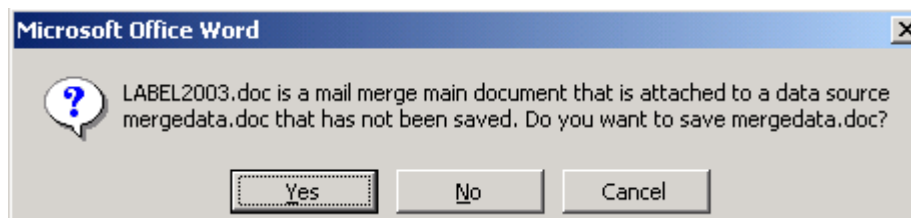
Figure 3-10

Activity 3.7   Reusing the document

Once you have saved the main document, you may re-use it as many times as needed, re-running the merge each time to take account of any new additions.

When you open a mail merge main document again, the popup in Figure 3-11 will appear – this re-links the main document to its data source, and you should click **Yes** to continue.
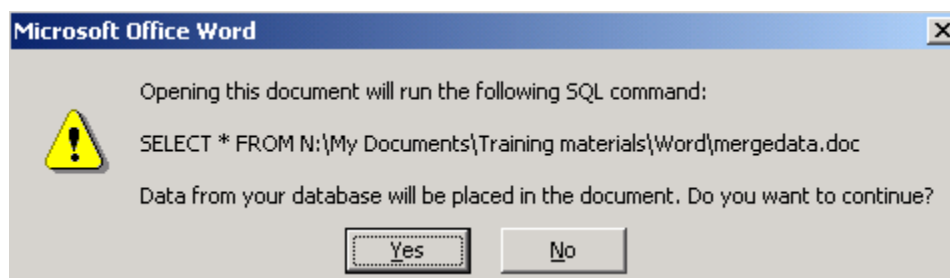

Figure 3-11

To merge the documents again, choose **Tools – Letters and Mailings – Mail Merge** from the menu.

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

Word will ask for confirmation that you want to link the document with the data source, as in Figure 4-1
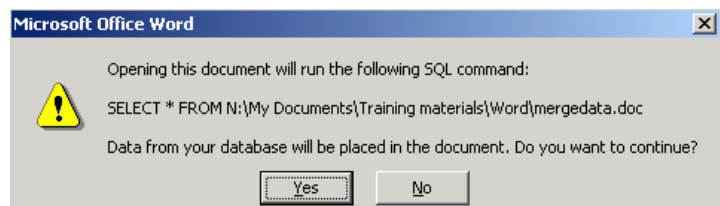

> **Microsoft Office Word**
>
> ⚠ Opening this document will run the following SQL command:
>
> SELECT * FROM N:\My Documents\Training materials\Word\mergedata.doc
>
> Data from your database will be placed in the document. Do you want to continue?
>
> [Yes]   [No]

Figure 4-1

- Click **Yes**

Word should automatically update the preview with the new

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

5 Sort the Mail merge alphabetically

Objectives To sort the generated document into alphabetical order

Activity 5.1   **Mail merge toolbar**

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.

- 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 – Letters and Mailings – Show Mail Merge Toolbar**

Figure 5-1

- Click on the third icon from the right, , Mail Merge recipients

The data source pops up

You may sort by any field in the document.

- Click on **Surname**

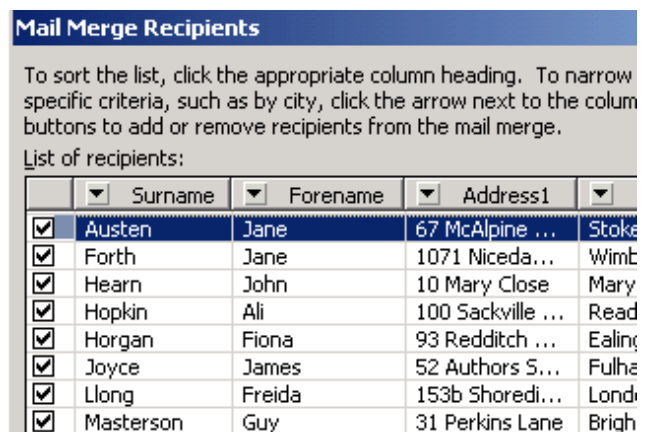The data within the popup and the document itself are sorted alphabetically by surname.

Figure 5-2

- Click **OK**

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   Filter by Field

The same option on the toolbar may be used to include only certain records in the mail merge.

You may filter records by ticking the records to be used in the 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.

The data source we used earlier has a 'group' field to delineate individuals.

If you completed exercise 5, above, you can skip the following instruction

- Choose **View – Toolbars – Mail Merge** to display the mail merge toolbar

Figure 6-1

- Click on the **Mail merge recipients** icon

The tickboxes on the left of the list allow you to select or deselect individuals.

Figure 6-2

- Scroll to the right to find the Group field

Should you choose to add a field to group your address details, it can be called anything you want, and contain any information you want – numbers, abbreviations etc.

The drop down at the top allows you to select a value on which to group records – in this case, all individuals are either "friend" or "colleague"
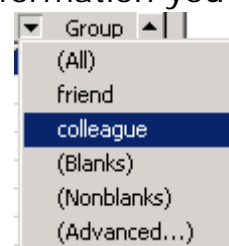
Figure 6-3

- Select **colleague** from the drop-down menu

The list is reduced to include only those with the word colleague in the group field

- Click **OK**

The preview shown in the main document will now show only five records.

Activity 6.2   **More Advanced options**

You may want to have several ways of marking different people in your data source. More advanced options are available from the drop-down menu to give more flexibility.

- Click on the **Mail merge recipients** icon

- Scroll to the right to find the Group field and use the drop down to select All to show all records

Note that the Group field's drop-down appeared blue to show that a filter had been applied.

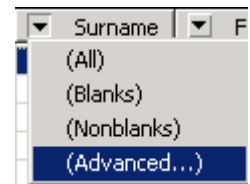- On the Surname field drop-down, select Advanced

Figure 6-4

The Query options window pops up, allowing you to specify a range of options

- In the example in Figure 6-5, two surnames are specified and only those records will be merged
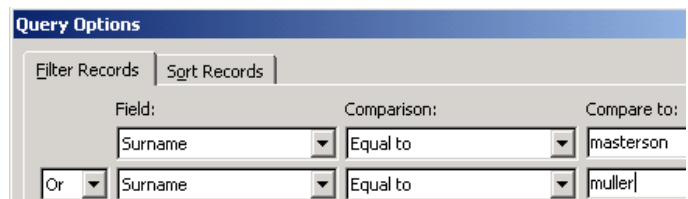
Figure 6-5

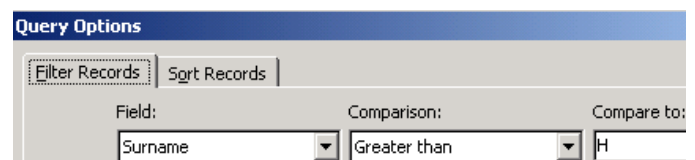- In the different example in Figure 6-6, surnames beginning with A-G are ruled out

Figure 6-6

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 – Letters and Mailings – Mail Merge**

The mail merge helper window pops up

- "Letters" are the default type of Mail merge so you may click on **Next: Starting document**

The next step asks whether you want to use the current document or create a new one

- Make sure **Use the current document** is selected
- Click **Next: Select recipients**

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 **Browse** link

- Open the document **mergedata.doc** from your n: drive

- Click **OK** when the list of recipients appears
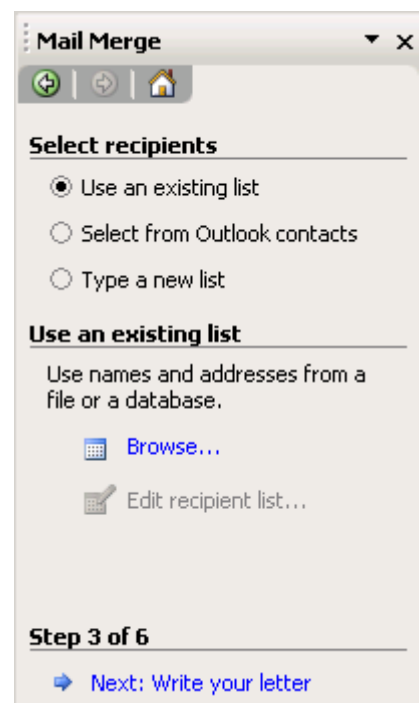
- Click on **Next: Write your letter**

Figure 7-1

Activity 7.3 **Add merge fields**

To insert merge fields, click to place the cursor at the correct

place in the document, and choose the field to insert from the Mail merge dialogue.

- Click to insert the Address block at the top left
- Use the **Match Fields** button to assign the Forename field to "First Name" and Address3 to City, as in Figure 7-2
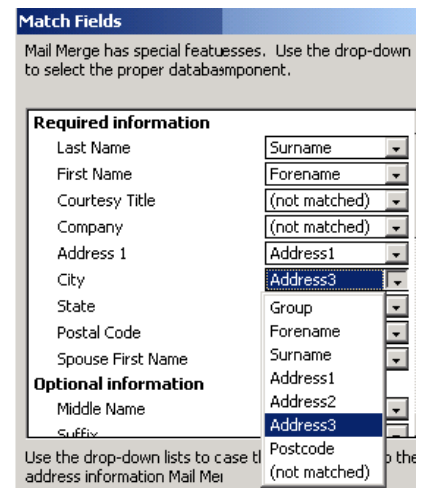

Figure 7-2

To add other fields, you should use the **More Items** link.

- Place the cursor before the , of Dear ,

- Click on **More Items**

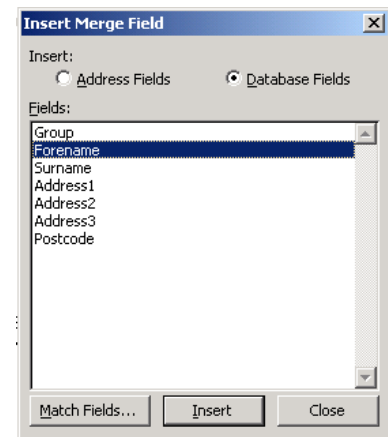- Select Forename and click **Insert**

- Click **Close**

Figure 7-3

- Place the cursor between "valued of"
- Click on **More Items**
- Select Group and click **Insert**
- Click **Close**

- Click **Next: Preview your letters**

Activity 7.4   **Preview merged letters**

The letter document will now show the letter with information from the first record from the data source 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 by clicking on **Previous: Write your letter**.

To preview other records, use the arrows as in Figure 7-4

Figure 7-4

Activity 7.5   Complete the Merge

Finally you may print all the letters.

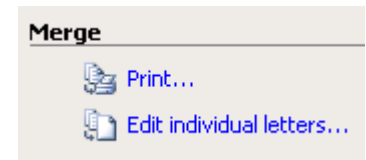- Click **Next: Complete the merge**

Figure 7-5

To send all the letters to a printer, click **Print** in the Mail Merge window, as in Figure 7-5. Note that using the normal print command on this screen will print only the record that is currently being previewed.

To see all the letters in a separate document, click **Edit Individual letters**.

Whichever option you choose, the confirmation screen shown will pop up – click **OK** to merge all records.
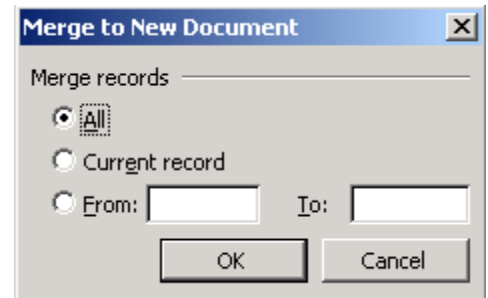

Figure 7-6

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 – Letters and Mailings – Mail Merge**
- Choose **Labels** from the list
- Click on **Next: Starting document**

The next window in the Mail Merge helper asks which label size to use.

- Click the **Label options** link
- Choose the label size required – remember that popular Avery size labels will appear under **Avery A4 and A5 sizes**
- Click OK
- Click **Next: Select recipients**

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 **Browse** link

- Browse to wherever you saved the downloaded files earlier and double click on the file **mergedata.xls** to make it the data source (you may single-click and choose open if you prefer)
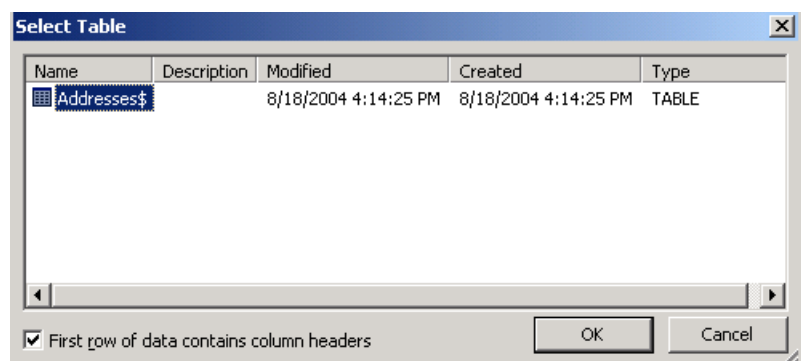

Figure 8-1

The window shown in Figure 8-1 will appear. For a more complicated spreadsheet there might be several options (representing different sheets within the Excel workbook), but for our purposes there is only the one.

- Click OK

Again the list of recipients will pop up.

- Click Ok

Activity 8.3   **Set up the labels**

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

- Click **Next: Arrange your labels**

- Click on **Address Block**
- Click on the **Match Fields** button
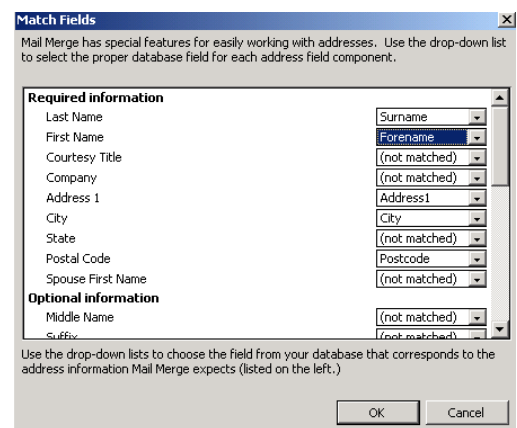- Use the drop-down to add the Forename field to the First Name

Figure 8-2

- Click Update all labels on the mail merge window
- Click **Next: Preview your labels**
- Click **Next: Complete the merge**
- Save the mail merge main document

Finally, choose either **Print** to send all labels to print, or **Edit individual labels** to create a separate document containing them all. In either case, click OK on the window which pops up.

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
- Start a new document (CTRL+N or click the ⬜ icon at the top left of the screen)

- Choose **Tools – Letters and Mailings – Mail Merge**
- Choose **Labels** from the list
- Click **Next: Starting document**

- Click on **Label Options**
- Choose a label size and click OK
- Click **Next: Select recipients**

Activity 9.2   Choose the data source

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

- Click on the **Browse** link
- Browse to your n: drive and select the database, **mergedata.mdb**
- The list of recipients pops up – click OK

Activity 9.3   Set up the labels

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

- Click **Next: Arrange your labels**

- Click on **Address Block**
- Click on the **Match Fields** button
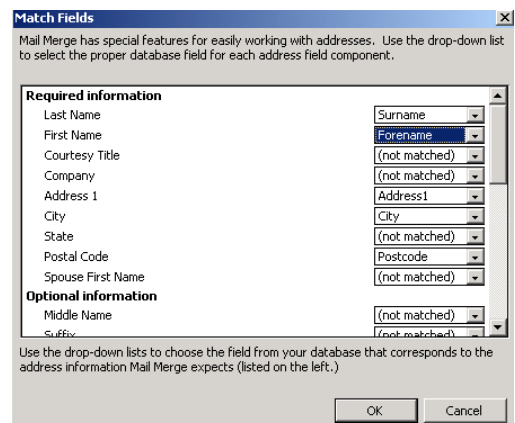- Use the drop-down to add the Forename field to the First Name

Figure 9-1

- Click Update all labels on the mail merge window [Update all labels]
- Click **Next: Preview your labels**
- Click **Next: Complete the merge**
- Save the mail merge main document

Finally, choose either **Print** to send all labels to print, or **Edit individual labels** to create a separate document containing them all. In either case, click OK on the window which pops up.