

Creating Main Documents and Data files

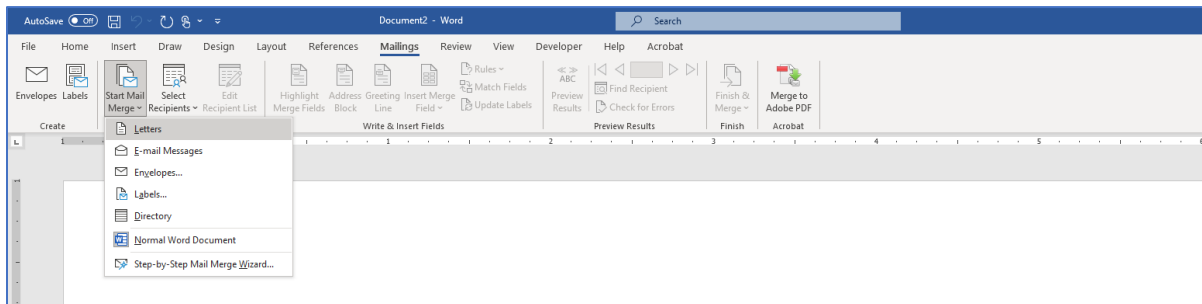
Merging

The process of merging combines: a Data Source File and a Main Document. The Data Source contains information such as names and addresses. The Main Document contains everything in the document except data like the name and address of the recipient.

The result of a merge is usually several documents with different names, addresses or other information. Form letters are a good example of merged documents. In this exercise you will create both a data file and a form file.

You will also merge the two together and view the results.

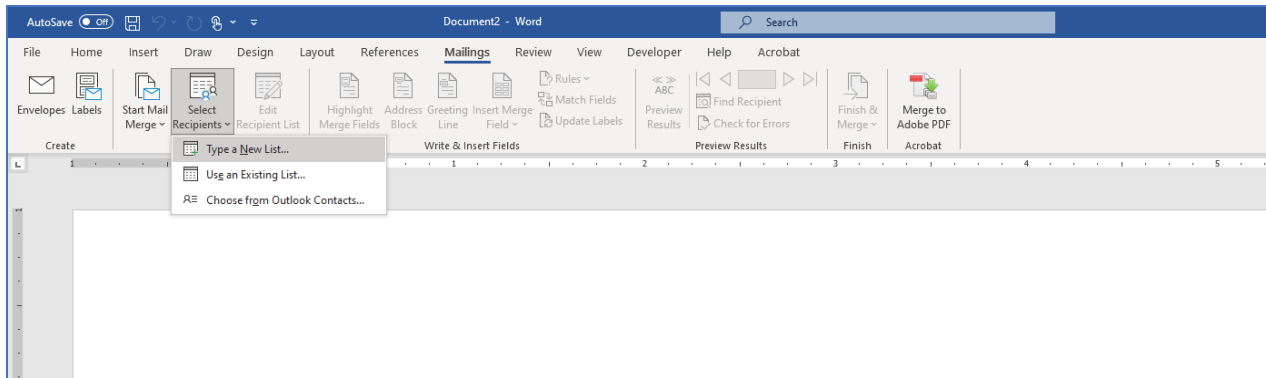
1. Click the Mailing tab in the MS Word ribbon.



2. Next, click the Start Mail Merge tool and select Letters from the drop down list.

Creating Mail Merge Documents in MS Word

The next step is to inform Word what to use as the data for the letters you are creating. In this exercise you will create a new data source. You could use an existing data file created in Word, Excel or Access by choosing the Use an existing list option. In this example, we will create a data file in Microsoft Word.



4. Now, click the **Select Recipients** and choose **Type New List...** from the drop down menu.

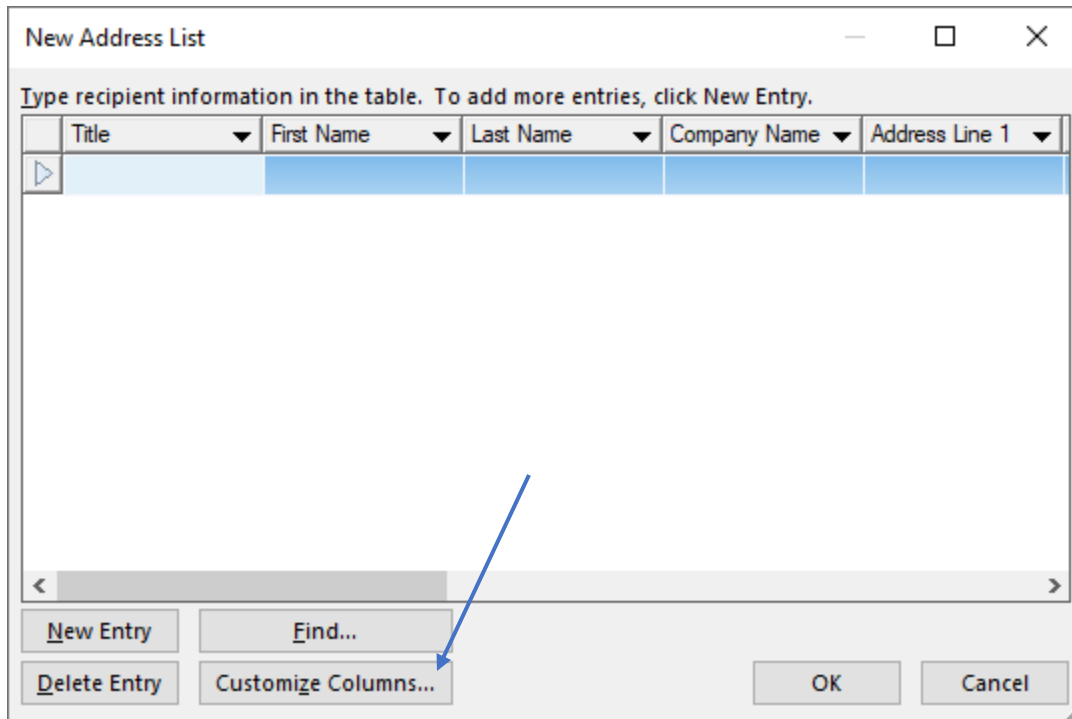
Creating a data source

You will now see the New Address List dialog box. Here you can simply start filling in names and addresses. Or, you can modify the field list if you want to add or delete fields. The fields are the most basic element in a data source and are what you will put into the "blanks" in your form letters. When structuring your own data files, fields should contain one piece of information only. In other words, separate the first and last names as well as the City, State and Zip into separate fields. Doing so will allow you to easily select which data records will receive letters.

Customizing the field list

Word gives you a suggested field list. You can remove the fields you do not wish to use. You can also add your own fields. To remove or add fields, you will click the Customize Columns button. Word will then take you to the Customize Address List dialog box where you can modify fields.

Creating Mail Merge Documents in MS Word

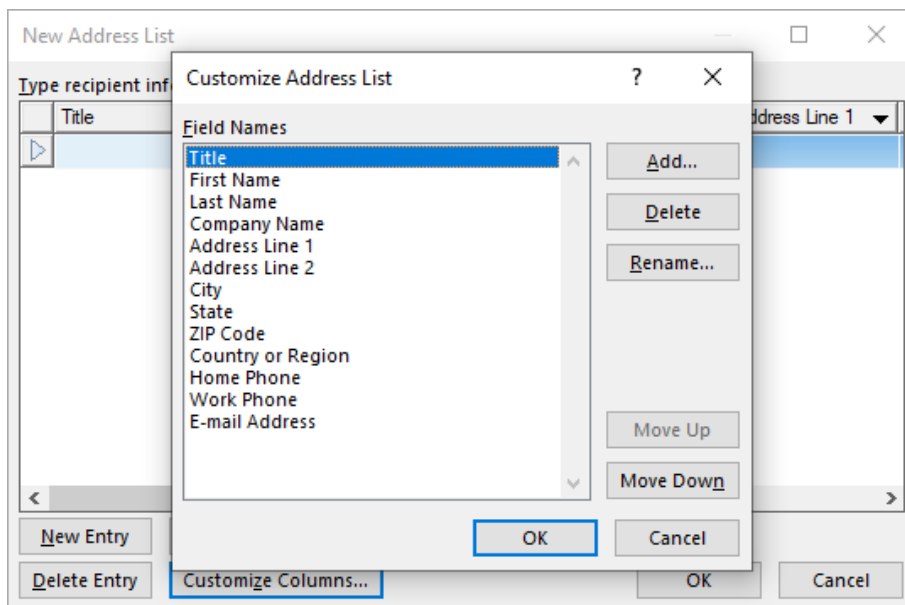


The 'New Address List' dialog box is shown. It has a title bar with standard window controls. Below the title bar is a text instruction: 'Type recipient information in the table. To add more entries, click New Entry.' Below this is a table with five columns: 'Title', 'First Name', 'Last Name', 'Company Name', and 'Address Line 1'. Each column has a dropdown arrow. The first row of the table is highlighted in blue. Below the table is a horizontal scrollbar. At the bottom of the dialog are five buttons: 'New Entry', 'Find...', 'Delete Entry', 'Customize Columns...', and 'OK'. The 'Customize Columns...' button is highlighted with a blue arrow pointing to it. There is also a 'Cancel' button to the right of the 'OK' button.

Title	First Name	Last Name	Company Name	Address Line 1

1. In the New Address List dialog box click **Customize Columns.**

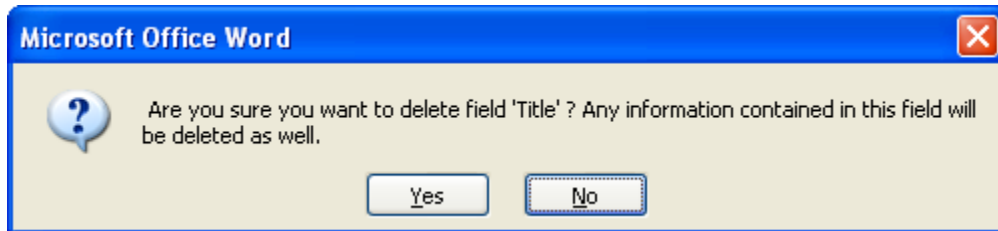
You will now see the Customize Address List dialog box. Here you can add, delete or rearrange fields.



The 'Customize Address List' dialog box is shown, overlaid on the 'New Address List' dialog box. It has a title bar with a question mark and a close button. Below the title bar is a list of 'Field Names' with a scroll bar. The fields are: Title, First Name, Last Name, Company Name, Address Line 1, Address Line 2, City, State, ZIP Code, Country or Region, Home Phone, Work Phone, and E-mail Address. To the right of the list are four buttons: 'Add...', 'Delete', 'Rename...', and 'Move Up'. Below these are two more buttons: 'Move Down' and 'OK'. At the bottom of the dialog are 'Cancel' and 'OK' buttons. The 'Customize Columns...' button from the 'New Address List' dialog is visible at the bottom of the screen, with a blue box around it.

2. In the Customize Address List, click on Title and then click Delete.

You will now be asked if you are sure you want to delete this field. If you answer Yes, your data source will not contain this field.



3. Answer Yes to remove the Title field.

Removing a field after you have already entered data could result in lost data, as this message is warning you.

4. Also remove the Company Name, Country or Region field from the field list.

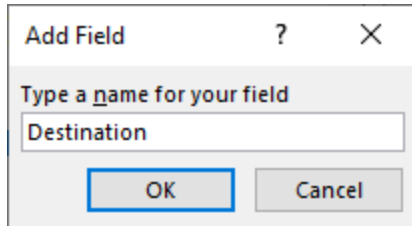
When creating your own data files remember that you don't have to use every field in every form letter. You are leaving the email address so we can use MS Word's merge feature to send out emails to customers.

Try to structure your data files so you can use them over and over with many different letters, envelopes or labels.

Adding Fields:

You can add your own fields to the data file. To add a field, click the Add button in the Customize Address List dialog box and then type the field name and click OK.

1. In the Customize Address List dialog box, click the Add button.



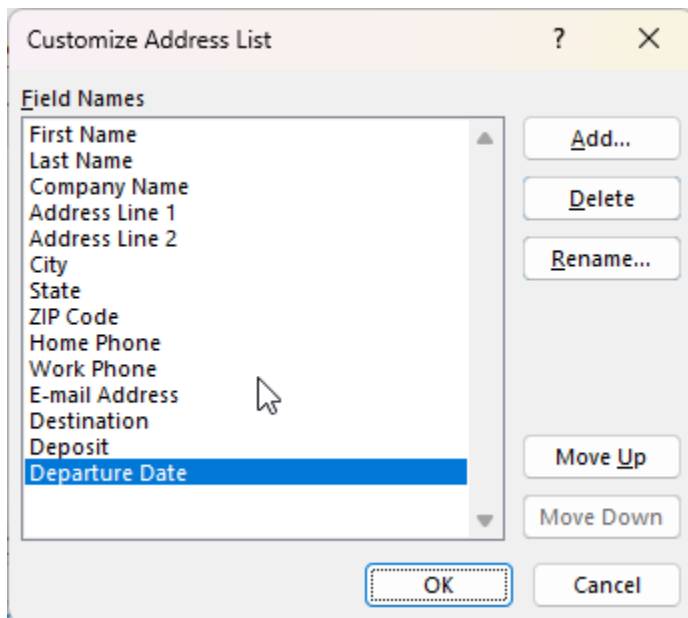
2. Type *Destination* in the Field name text box in the Add Field dialog box, and then click OK.

(You can also press (Enter) after typing the field name.)

You should now see that field name added to the list of fields.

3. Add two more fields named: *Deposit* and *Departure Date*.

Word will allow field names to contain spaces. You may easily reorder the field names by using the Move Up and Move Down buttons



4. Click OK after adding the new field names.

Now that you have determined and created the structure of your data source, the next step will be to fill in the information. Your data source can be dynamic, in that you will be able to add, delete and edit records in it in the future. You can do this by opening the data file in Word.

Edit Data Source

To edit items in your data source, type your changes in the table below. Column headings display fields from your data source and any recipient list fields to which they have been matched (in parentheses).

Data source being edited: Clients.mdb

	First Name ▼	Last Name ▼	Company Name ▼	Address Line 1 ▼	Address Line 2 ▼
▶	Adam	Johnson	Adam's Anvils	2341 W. Syracuse	

New Entry Find... Delete Entry Customize Columns... OK Cancel

5. Click in the first name column and then add the following Record in the first row. Use Tab to move from field to field.

Adam Johnson
Adam's Anvils
2341 W. Syracuse
Phoenix, AZ 94332 email: AdamJ99@gmail.com

Use *Bangkok* as the Destination, \$200 as the Deposit Amount and 6/1/28 as the departure date.

After entering a record, pressing the Tab key will take you to the next new, blank row. We are skipping phone numbers just to speed up the data entry process in this example.

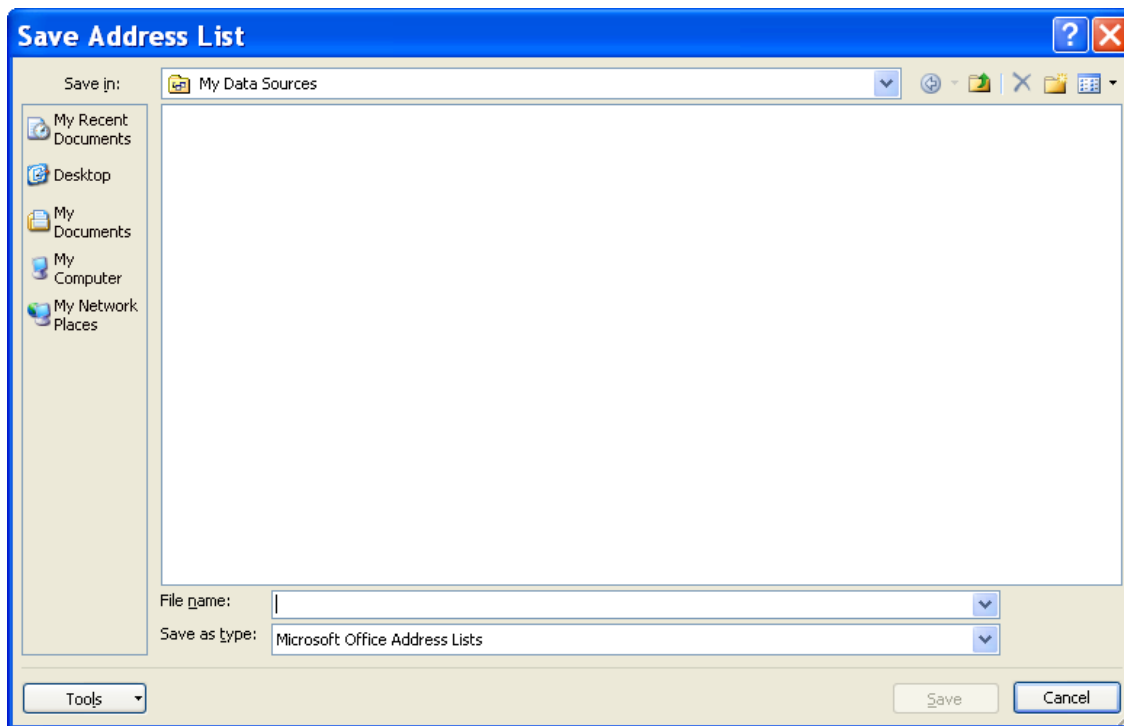
6. Click the New Entry button and enter four more records with the data as follows:

Be sure to separate the information into the proper fields.

<i>Kathy Anderson Anderson Plumbing 103 Main Boise, ID 83705 KAnderson@yahoo.com Maui \$0 7/12/26</i>	<i>Marvin Wagner 9111 Alpine Apt. 34 Jackson, MS 63321 MW33@gmail.com St. Thomas \$450 12/22/25</i>	<i>Susan Shepherd 88 Oak Nampa, ID 83651 Susie@gmail.com Reno \$0 12/25/24</i>	<i>Alicia Lopez 233 Maple Caldwell, ID 83605 LopezA@yahoo.com Cancun \$150 11/15/2027</i>
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7. After entering the last record, click OK.

You will now see the Save Address List dialog box. Here you can name your data source.



8. Save the data file as *Clients* when prompted to save the file.

At this point you are naming the data file. Your data source files are actually saved as Access files with an (*.mdb) file extension. You will be able to use this data file with other form documents if you wish. You will also need to save this file again after entering data records.

9. To make sure you have correctly entered all the records click the Edit Recipients List on the ribbon.

Data Source	Last Name	First Name	Company Name	Address Line 1	Address Line 2	City	State	ZIP Code	Home Phone	Work Phone	Email Address	Destination	Deposit	Departure Date
Clients.mdb	Johnson	Adam	Adam's Anvils	2341 W. Syracuse		Phoenix	AZ	94332			Adam99@gmail.com	Bangkok	\$200	6/1/2021
Clients.mdb	Anderson	Kathy	Anderson Plumbing	101 Main St.		Boise	ID	83706			KAnderson@yahoo.com	Maui	\$0	7/12/2026
Clients.mdb	Wagner	Marvin		9111 Alpine	Apt 34	Jackson	MS	63321			MW33@gmail.com	St. Thomas	\$450	12/22/2025
Clients.mdb	Shepherd	Susan		88 Oak		Nampa	ID	83651			Susie@gmail.com	Reno	\$0	12/25/2024
Clients.mdb	Lopez	Alicia		233 Maple		Caldwell	ID	83605			LopezA@yahoo.com	Cancun	\$150	11/15/2027

You will now see the Mail Merge Recipients dialog box. The image shows the list expanded to show all the fields. Here you can easily choose which records will receive the letter with the checkbox to the left of each record.

10. Click OK to close the Mail Merge recipients list.

Creating the Main Document (the Form letter)

Now you will create the form letter. When you come to a location in the document where you need information from the data file, you will simply insert a merge field code. This code will cause Word to fill-in the blank with the information from that field in the data file. Each record in the data file, unless you specify otherwise, will have its own filled-in form letter.

1. Center and type the following:

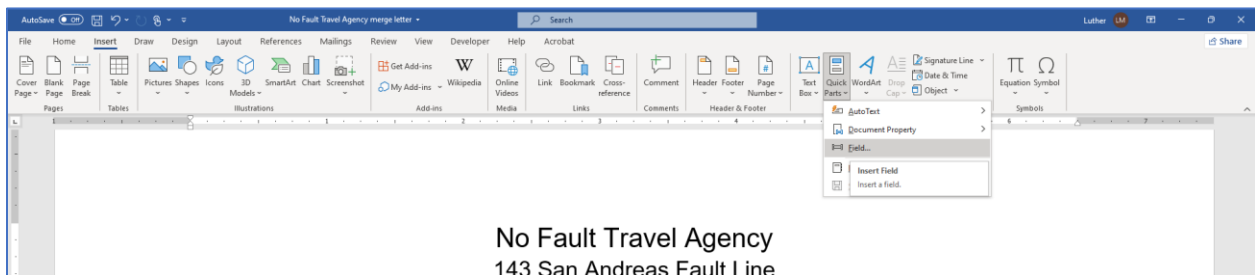
No Fault Travel Agency
143 San Andreas Fault Line
Hollister, CA 93992

3. Press (Enter) twice after typing the zip code. Then change the Alignment back to Left.

Using the Date Code

This is where you would like the current date to appear on the letter. However, if you type the date it will remain the same and this main document will only be good for that date. Instead, you would like a date that updates each time you perform a merge. To do this, you will use a Field code to insert the date.

4. Click the Insert Tab and then click Quick Parts and choose Field.



You should now see the Field dialog box. Here you will select a specific category to narrow down the list.

5. Choose Date and Time in the Categories list.

The screenshot shows the 'Field' dialog box with the following details:

- Categories:** A dropdown menu with 'Date and Time' selected.
- Field names:** A list box containing 'CreateDate', 'Date', 'EditTime', 'PrintDate', 'SaveDate', and 'Time'. 'CreateDate' is selected.
- Field properties:**
 - Date formats:** A list box showing various date and time formats. 'MMMM d, yyyy' is selected.
 - Date formats list:** A scrollable list of date and time formats including '7/23/2024', 'Tuesday, July 23, 2024', 'July 23, 2024', '7/23/24', '2024-07-23', '23-Jul-24', '7.23.2024', 'Jul. 23, 24', '23 July 2024', 'July 24', 'Jul-24', '7/23/2024 1:20 PM', '7/23/2024 1:20:59 PM', '1:20 PM', '1:20:59 PM', '13:20', and '13:20:59'.
- Field options:** Three checkboxes for 'Use the Hijri/Lunar calendar', 'Use the Saka Era calendar', and 'Use the Um-al-Qura calendar' are all unchecked. The 'Preserve formatting during updates' checkbox is checked.
- Description:** The text 'The date the document was created' is displayed.
- Buttons:** 'Field Codes' is at the bottom left. 'OK' and 'Cancel' are at the bottom right.

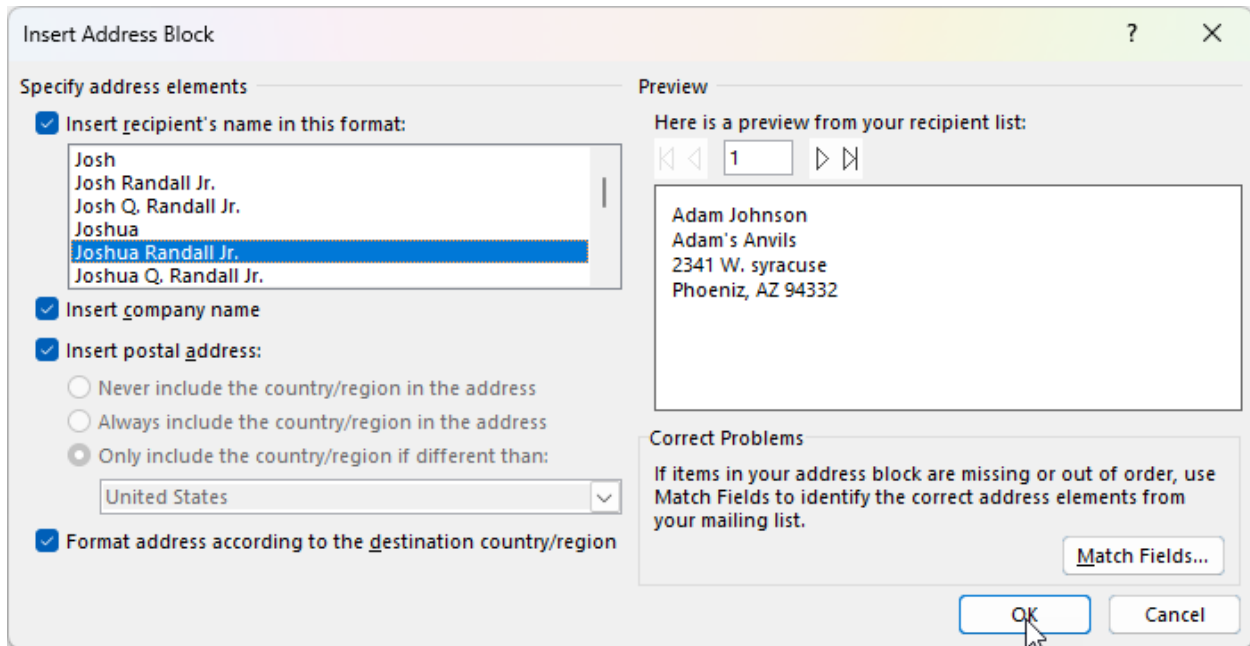
6. In the Field names column, select CreateDate, if necessary, and then choose the third date format from the top and click OK.

You should now see the current date in the main document. Because you used the field code, each time you create form letters with this main document, this date will update.

7. Press (Enter) twice to move down the page.

At this place in the letter, you will place the name and address of the letter's recipient. This information will come from the data file. To do this you will need to insert field codes representing the fields from the data file you just created. Using the Mail Merge Wizard will make this very easy.

8. Click the Mailings tab again and then click the Address Block tool.



The Insert Address Block dialog box displays several addressing options. It also shows a preview of the option you have selected.

9. Choose the fifth variation in the Insert Address Block dialog box and click OK.

You should now notice that Word inserted a merge code referring to the address block, formatted as you specified. When you merge, each record's complete name and address will appear at this location in the letter.

10. Press (Enter) twice to move down the page.

You are now ready for the salutation, or greeting line, in this letter.

11. Click the Greeting line tool in the Write & Insert Fields group.

Insert Greeting Line

Greeting line format:

Dear Joshua Randall Jr.,

Greeting line for invalid recipient names:

Dear Sir or Madam,

Preview

Here is a preview from your recipient list:

Dear Adam Johnson,

Correct Problems

If items in your greeting line are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.

Match Fields...

OK Cancel

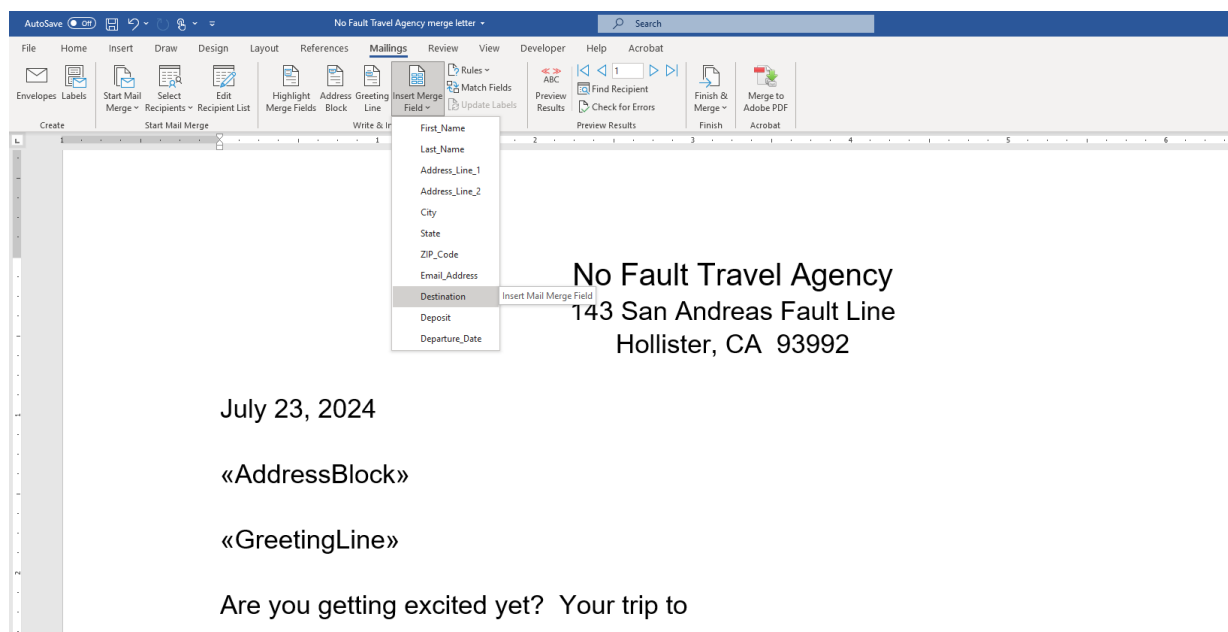
The Greeting Line dialog box allows you to specify exactly how you would like the greeting to appear and what fields from the data source you want to display.

12. Click OK in the Greeting Line dialog box to accept the defaults.
13. Press (Enter) twice to move down the page.
14. Begin the body of the letter by typing: *Are you getting excited yet? Your trip to* and then press (Space).

You have now come to a spot in the letter where you want to insert some information from the data source for each record. To do this you will have to insert an individual field.

15. Click the Insert Merge Field tool on the ribbon in the Mailings tab.

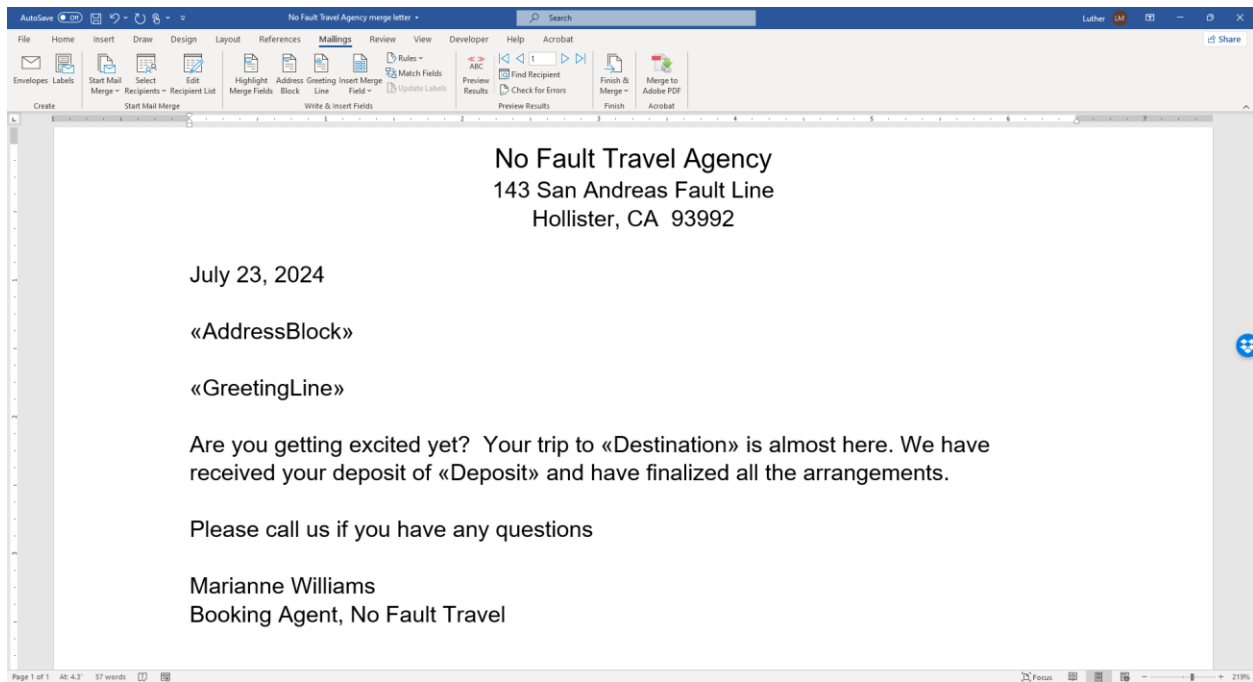
Creating Mail Merge Documents in MS Word



You should now see a complete list of individual fields in the data source. Here you can choose the field, or fields, you need in any place in the letter.

16. From the list of merge fields, select **Destination**.
17. Press (Space) and then type *is almost here* and then end the sentence with a period (.) and a space.

18. Create the rest of the letter as shown below. Insert a Merge field code for Deposit as indicated in the letter.



19. When done, save this as *Booking Letter* and close it.

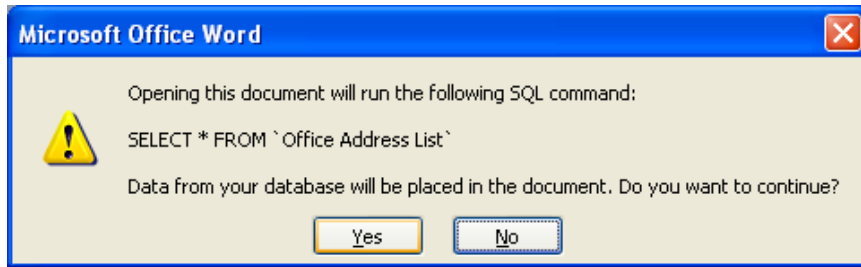
Performing the merge

After creating both a main document and a data source, you can now combine the two. By default, Word will create one form letter for each record in the data file. Since this is not always appropriate, you will learn in this lesson how to select certain records to be included in the merge.

The first step in performing the merge is to open the main document (form letter). You established a link between the main document and data source when you created the main document. Therefore, you won't need to specify the name of the data file to complete the merge.

1. Open *Booking Letter* and answer Yes when asked if you also want to open the database.

Creating Mail Merge Documents in MS Word



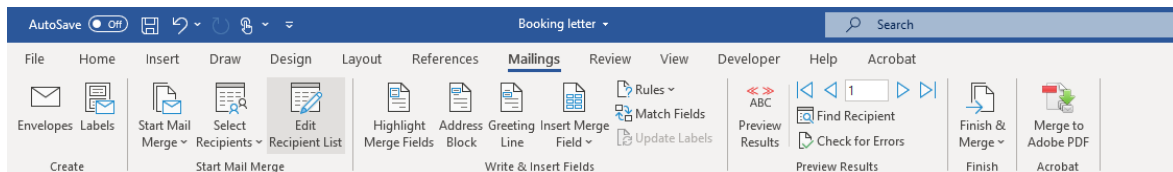
Word will now inform you that this document is linked to a database, the merge data file. Answer Yes to link the letter with the merge data file you created earlier.

2. If needed, click the Mailings tab on the ribbon.

The Mailings tab has some very useful tools. On this ribbon are options to select which records in the data source you want to include in the merge, and buttons to perform the merge to a new document, printer, fax or email.

Filtering records

In this example, you do not want all records to get this letter. Sending this letter to someone who had not made a deposit would not be a good idea. You will use the filter option to choose only those records who have made a deposit.



3. In the Mailings tab, click the Edit Recipients List tool.

Creating Mail Merge Documents in MS Word

Mail Merge Recipients

This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

Data Source	☒	Last Name	First Name	Address Line 1	Address Line 2
Clients.mdb	☒	Johnson	Adam	2341 W. Syracuse	Apt 23
Clients.mdb	☒	Anderson	Kathy	101 Main	
Clients.mdb	☒	Wagner	Marvin	911 Alpine	Apt 34
Clients.mdb	☒	Shepherd	Susan	88 Oak	
Clients.mdb	☒	Lopez	Alicia	233 Maple	

< >

Data Source Clients.mdb **Refine recipient list**

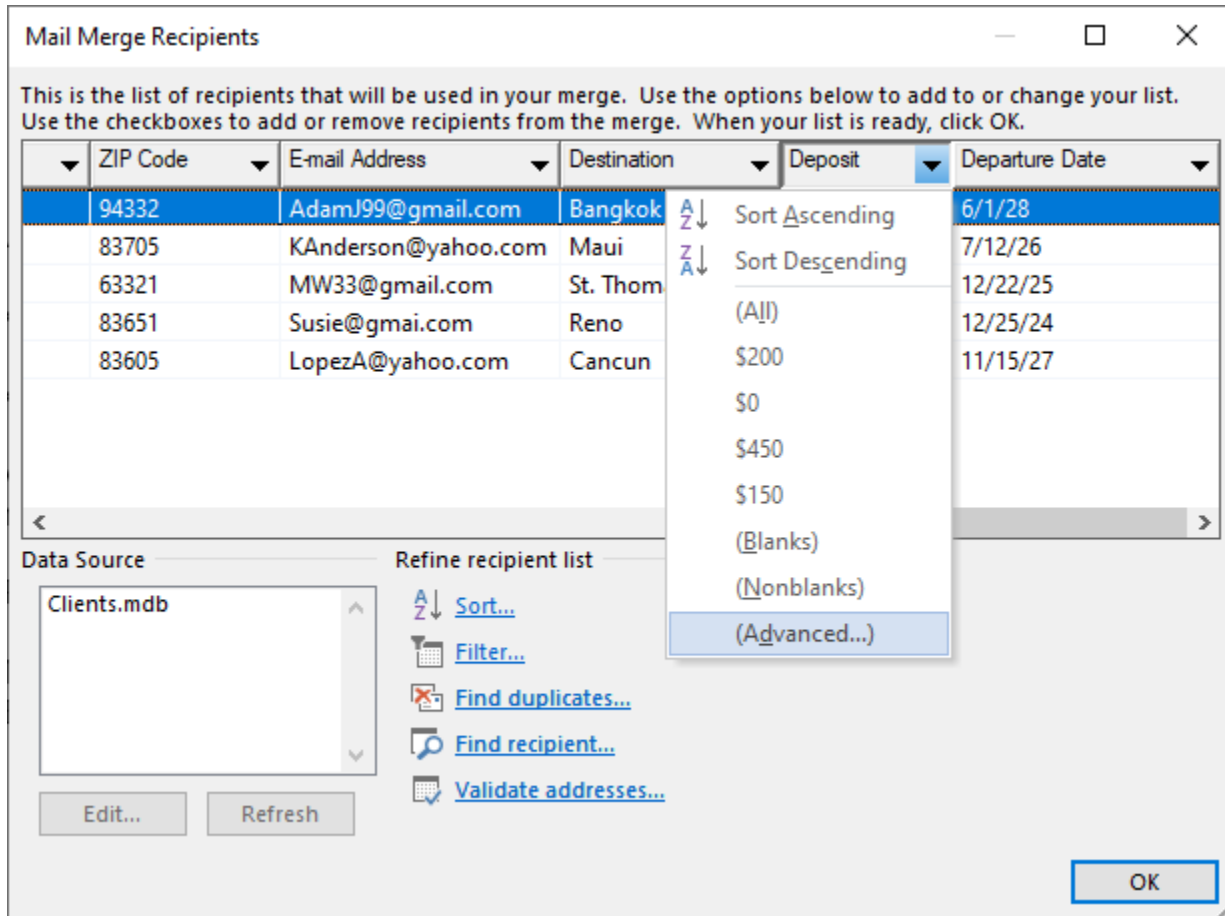
[Sort...](#)
[Filter...](#)
[Find duplicates...](#)
[Find recipient...](#)
[Validate addresses...](#)

Edit... Refresh

OK

You should now see the Mail Merge Recipients dialog box. Here you can select records individually with the check box beside each record. Or, as in the case for this letter, you can specify a certain condition to select records to include in the merge. You can do this by choosing the filter option. You access the filter option by clicking the drop-down list button to the right of each column's heading.

4. Scroll right until you locate the Deposit field column. Then, click the drop-down list arrow to the left of this field to display the filter options.



5. From the filter options for the Deposit field, click Advanced.

The screenshot shows the 'Filter and Sort' dialog box with the 'Filter Records' tab active. The first filter rule is configured as follows:

	Field:	Comparison:	Compare to:
And	Deposit	Greater than	\$0

Buttons at the bottom: Clear All, OK, Cancel.

6. **Ensure the Filter Records tab is selected. Then, click the Field drop-down list arrow and choose Deposit.**
7. **Choose Greater than as the Comparison and type \$0 in the Compare to text box. Click OK when done.**

You have now told Word to exclude all the records in the data file that have not made a deposit. Word will only create letters for the records in the Client data file with a deposit. The Mail Merge Recipients dialog box displays the records that will be included in the merge.

Creating Mail Merge Documents in MS Word

Mail Merge Recipients

This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

Data Source	☒	Last Name	First Name	Address Line 1	Address Line 2
Clients.mdb	☒	Johnson	Adam	2341 W. Syracuse	Apt 23
Clients.mdb	☒	Wagner	Marvin	911 Alpine	Apt 34
Clients.mdb	☒	Lopez	Alicia	233 Maple	

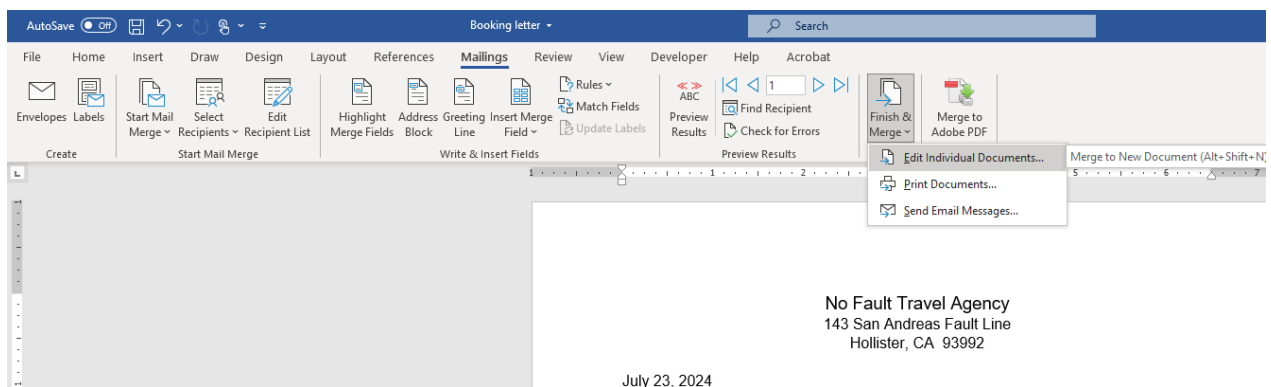
Data Source Clients.mdb **Refine recipient list**

[Sort...](#)
[Filter...](#)
[Find duplicates...](#)
[Find recipient...](#)
[Validate addresses...](#)

[Edit...](#) [Refresh](#) [OK](#)

8. Click OK to close the Mail Merge Recipients dialog box.

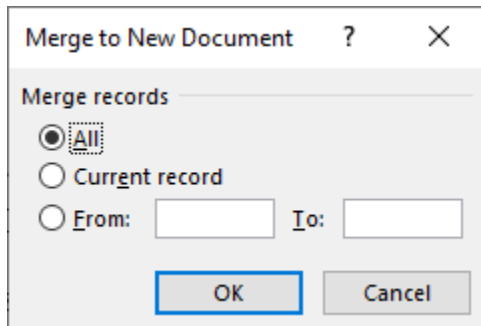
You are now ready to perform the merge.



9. Display the drop down list for the Finish & Merge tool and choose Edit Individual Documents.

Creating Mail Merge Documents in MS Word

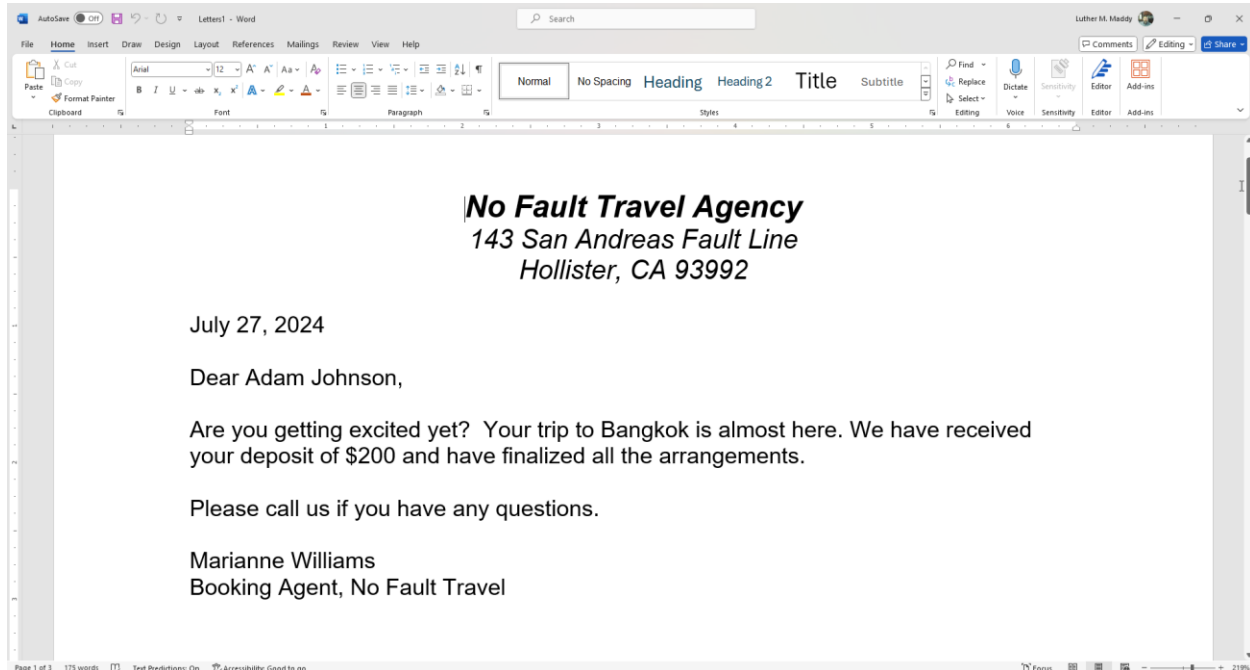
When you merge, Word will create a new document that contains one page for each letter. One advantage of merging to a new document instead of clicking the Merge to Printer option is so that you can edit the individual merged documents if you want to.



You will now see the Merge to New Document dialog box. Here, Word is asking one more time which records you would like to include in the merge. Since you already filtered the records, you will not make any changes here.

10. In the Merge to New Document dialog box, ensure All is selected and then click OK.

You should now see a new document consisting of three pages. Each page is a completed letter for each client who has made a deposit.



11. View the resulting merge documents, then close without saving.

12. Close the Booking letter, answering No when asked if you want to save the changes.

Saving your changes will cause Word to save the filter you applied to the data file permanently. This means that the next time you display the list; you would only see those records with a deposit amount. To see all records again you would have to change the filtering on the data source.