



IT Tips and Tricks #1

Mail Merge using Word

Here, we have looked at a common request: the ability to write a mailshot letter to all clients contained in a data source held in either Excel or Access.

Set out below is the method to follow using either Office 97 or 2000. The process is slightly different with Office XP and 2003.

The easiest way to do this is to create a Mail Merge using Word. The following steps will take you through the stages...

1. Type your letter, leaving out any references to names or details of the people to whom the letter is to be addressed to. This includes any references within the body of the letter, itself.
2. Save the document (you don't actually need to do this, but it is good practice!)
3. From the Menu Bar, choose Tools > Mail Merge. This will open the Mail Merge Helper.
4. Click the button to create a main document, selecting Form Letters. You will then be given the option to use either the document in the Active Window, or to create a New Main Document. Selecting Active Window uses the existing document that you have open; New Main Document creates a new document to "start from scratch". I always use the Active Window.
5. Select a Data Source by clicking on the Get Data button. To use an Access Database, select Open Data Source. You will then need to find the database that you wish to use as the source. This is a very similar process to opening any previously created file. You will need to remember to change the file type at the bottom of the dialog box to "MS Access Databases". When you have found the database, click Open. (By default, when you insert database information or attach it as a mail merge data source, Word uses DDE to read the data file. DDE automatically starts the source program (such as Microsoft Access) and then opens the data file. If you don't want to start the source program, you can use ODBC or a file converter instead of DDE to read the data file directly. If you wish to use a query as the basis of your mail merge, you will need to select the DDE option, otherwise, you will only be able to use the tables of your database). Finally, you will be required to select the table or Query within the database that you wish to use. You will then be told that



there are "...no merge fields in your main document..." Click the "Edit Main Document" Button, which will return you to the main document. It will also add the Mail Merge Toolbar to your document.

6. Click on the point where you wish to insert a "merged field" and select, from the Mail Merge Toolbar, the fields that you wish to insert. If you wish to see the "Real names" rather than the merged fields, click the button which shows << >> above ABC (View Merged Data).

7. For printing, you can either You can use the Record Selectors to move between different records and then use File > Print to print out that specific record, or use the "Merge to Printer" button to perform the mail merge and print out the letters. I would suggest printing for a single record first to check page set ups, etc.

8. Finally, re-save your document.

9. To restore the document back to a "normal" Word document, click on the Mail Merge Helper Icon (or go Tools > Mail Merge). Click the button to create a main document, this time selecting "Restore to normal word document".