

Creating Main Document for Mail Merge

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A main document is a letter, envelope, or other document that has text that you want to appear on every merge, and codes that will be replaced with entries from a data source of names and addresses. The main document has the Mail Merge Helper button on the Mail Merge toolbar, which is the launching point for the other Mail Merge tasks. When creating a main document for a mail merge, you can use an existing document or create a new document. In either case, you need to define the document as the main document for the mail merge.

1. Open the existing document you want to use, or a new blank document window. Then choose Tools, *Mail Merge* to display the Mail Merge Helper (fig 1).

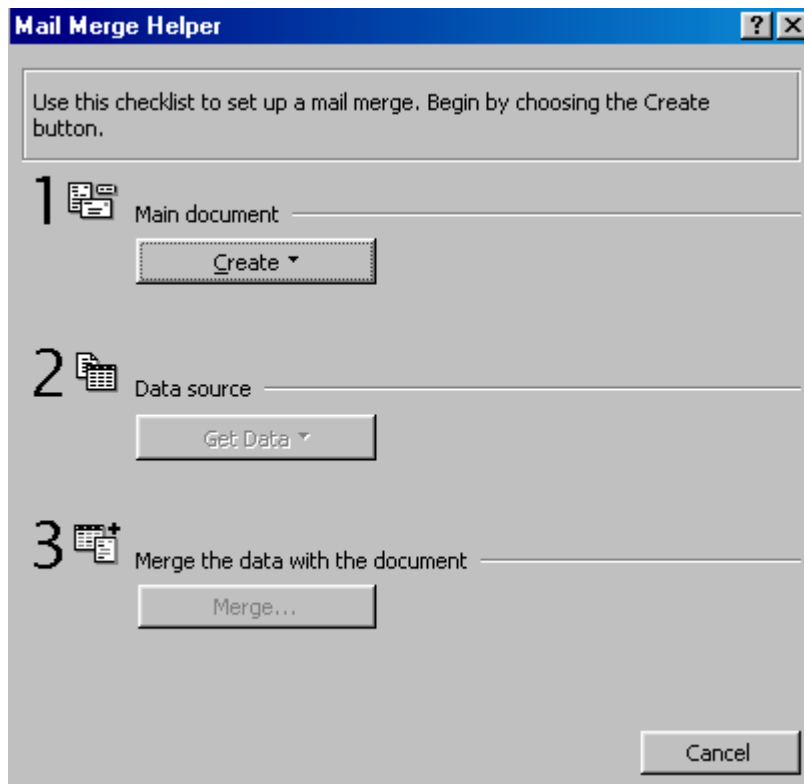


Fig. 1. Mail Merge Helper.

2. Click the Create button under *Step 1 Main document*, then select *Form Letters*.
3. Word will give you a choice to use the *Active Window*, which is the document window that is open behind the dialog box. Or, start a *New Main Document*, which will open a new blank document window.
4. Word takes you back to the *Mail Merge Helper* dialog box, which now displays the type of merge and the name and path of the document under the Main Document step.
5. You are now ready to choose *Get Data* under *Step 2 Data Source*, or *Edit the Main Document* under *Step 1*.

Creating Data Source

If you do not have a data source that contains your list of names and addresses for your merge document, you can create one using the Mail Merge Helper.

1. With the main document for your mail merge open, choose *Tools, Mail Merge* to display the *Mail Merge Helper* dialog box.
2. Choose *Get Data* under *Step 2* on the dialog box; then choose *Create Data Source* to display the Create Data Source dialog box (fig. 2).

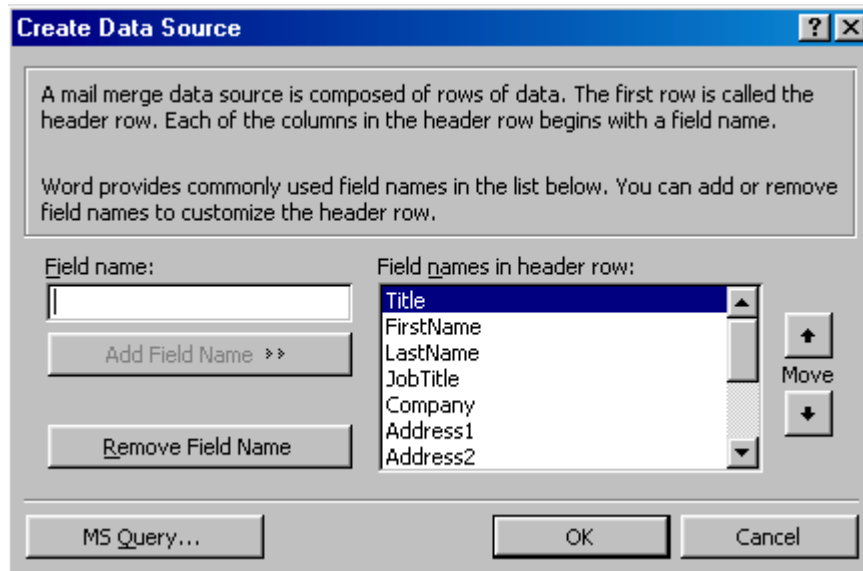


Fig. 2. Create Data Source dialog box.

3. Scroll through the list of fields in the *Field Names in Header Row* list box to see commonly used field names provided by Word.
4. Edit the list of field names or add new fields using the list following these steps and when finished, choose OK.
5. Word displays the *Save As* dialog box. In the *File Name* box, enter a name for the data source document and choose *Save*.
6. Word displays a decision box; choose *Edit Data Source* to enter information into the data source file you just created, or choose *Edit Main Document* to insert merge fields into the main document.

You can change field names in Step 4 through various options including the following:

- If you see any field names you won't use in your main document, select the name from the list, then choose the *Remove Field Name* button.
- To add a field name that isn't listed, type the name in the *Field Name* text box, then choose *Add Field Name*.
- To change the sequence of field names, select a field name in the *Field Names in Header Row* list box, then click the up-arrow or down-arrow buttons. The top-to-bottom order of the fields is the order the fields will be in for data entry in the data source.

Entering Data

After you have created a data source, you will need to enter information into the source and edit existing information. If the data source is created in an application other than Word, follow the procedures for entering and editing in the source application. If, on the other hand, you created the source in Word using the Mail Merge Helper, you can follow these instructions.

1. When you have finished defining your header fields for the data source, you are presented with the decision box that has two options: choose *Edit Data Source*, or choose *Edit Main Document*. Choose the *Edit Data Source* button to enter information into the data source.
2. If you have been working with the main document, choose the Mail Merge Helper button on the toolbar. Then choose *Edit* under *Step 2 Data Source* and select the file listed.

3. The Data Form dialog box will be displayed (fig. 3). Type the information for each field; press Tab to move to the next field and Shift+Tab to move to the previous field. When you get to the last field on the record and press Enter, you will be presented with a new blank record.

Fig. 3. Data Form dialog box.

4. To find a specific record, click the *Find* button, type what you are looking for in the Find What text box, then select the field that the data should be in from the *In Field* list box. Choose *Find First* to move to the first record that matches your criteria.
5. The Find First button changes to Find Next after you begin the search. Continue to click Find Next until you find the record you are looking for. When you are finished with the search, choose the *Close* button. When you finish entering or editing information in the *Data Form* dialog box, choose the OK button to return to your main document.

You can also access the Data Form dialog box by clicking the *Edit Data Source* button on the Mail Merge toolbar.

Inserting Fields

Once you have attached a data source for your mail merge, you are ready to insert merge fields in the main document. Merge fields are the variable information that changes for each document. The document could be a letter, form, invoice, or even a brochure.

1. If the main document is not open with the Mail Merge toolbar displayed, click the Mail Merge Helper button on the toolbar. Click *Edit* under Step 1 *Main Document*, and then select the main document from the displayed list.
2. Position the insertion point where you want a merge field to appear. Click the *Insert Merge Field* button on the Mail Merge toolbar, and then select the field from the list presented.
3. Type any text or punctuation that is needed in the document and continue inserting merge fields where

Merging Data

Once you have created your main document and selected a data source, you are ready to merge the two together.

1. Open the main document with the data source attached. This can be a form letter, mailing labels, or an envelope. 2. On the Mail Merge toolbar, select one of the buttons in the following list.

Merge to New Document	Creates a merged document in a new Word document with the temporary name Form Letters.
Merge to Printer	Creates the merged document and prints it on the currently selected printer.
Mail Merge	Displays the Merge dialog box, which provides options for selecting records and sorting records before you merge.

Opening a Data Source

You can use an existing file for the data source in your mail merge. Your data source could be a Word document, an Excel document, an Access database or query, a dBASE file, or even a FoxPro file, as well as many others.

1. With the main document for your mail merge open, choose *Tools, Mail Merge* to display the Mail Merge Helper dialog box.
2. Choose *Get Data* under Step 2 on the dialog box; then choose *Open Data Source* to display the Open Data Source dialog box.
3. Word can read many different data source formats. Choose the drop-down arrow on the *Files of Type* list to select the file type for your data source.
4. Navigate in the *Look In* list to find the drive and folder where the data source file is stored. Select the file and choose *Open*, or if available, click the *MS Query* button if you want to select a non-Word database.
5. When you are prompted that Word found no merge fields in your main document, choose the *Edit Main Document* button to insert merge fields into the main document.

Note: Microsoft Query comes as a separate application with Microsoft Excel. If it is available, you can retrieve data that is on your computer, a network, SQL server, or many types of mainframe databases.

Selecting a Data Source

The second step in creating a mail merge is selecting a data source. When you attach the data source to the main document, three things happen: Word can then recognize the file name and path where the data will be located; the Mail Merge toolbar is attached to the top of the main document; and Word can read the field names in the data source so you can use them as merge fields in your main document.

1. With the main document for your mail merge open, choose *Tools, Mail Merge* to display the Mail Merge Helper dialog box.
2. Choose *Get Data* under Step 2 on the dialog box; then choose *Create Data Source, Open Data Source, or Use Address Book*.
3. Respond to any messages that are displayed. When you are prompted that Word found no merge fields in your main document, choose the *Edit Main Document* button to insert merge fields into the main document.

Selecting Specific Records and Sorting

When you are preparing a mail merge, there are often times you don't want to send a letter to everyone in the data source. For example, you may want to limit the merge to a specific ZIP Code, or only send letters to purchasing agents. If this is the case, you can define your criteria for the merge by using the Merge dialog box.

1. Open the main document with the data source attached. This can be a form letter, mailing labels, or an envelope.
2. On the Mail Merge toolbar, select the *Mail Merge* button to display the Merge dialog box.
3. In the *Merge To* list box, select *New Document*.
4. Choose the *Query Options* button to specify your criteria for the merge. On the *Filter Records* tab, select the first field you want to limit from the *Field* list. On the *Comparison* list, select the type of comparison (Equal to, Not equal to, Less than, and so on); in the *Compare To* text box; type the numeric value or text you want compared.
5. After you make an entry in the Compare To box, the word "And" appears in the left-most drop-down list in the next row. Select the *And* or *Or* option to add another selection rule. Follow the instructions in Step 4 to add another rule.
6. Choose the *Sort Records* tab to identify up to three sort levels for the merge. In the *Sort By* list, select the primary sort field; in the *Then By* and the *Then By* list fields, select the secondary sort fields. Select the sort order with the option buttons to the right of the list boxes. Choose OK, then choose *Merge* to complete the merge.

NOTE In the previous Step 3, you can also choose electronic mail. You then need to choose the Setup button to define the mail or fax address and the subject line for mail messages. Another option is to merge directly to the printer.

Creating Envelopes

With the Mail Merge Helper, you can create mail merge envelopes or a document that merges mail merge envelopes and documents at the same time. First, create a main document and a data source, and attach the data source to the main document.

You will need to create a data source (a location for names and addresses) before you complete this task (see Creating Data Source). After you create the data source, you need to be in the main document (see "Creating Main Document").

1. With the main document active, choose Tools, Mail Merge. Click the *Create* button under Step 1 *Main Document*, select *Envelopes*, then select either the Active Window or New Main Document button.
2. Click the *Get Data* button under Step 2 *Data Source*, then select *Open Data Source* to find the data source file. Select the file and choose Open.
3. Click *Set Up Main Document* to display the *Envelope Options* dialog box (fig. 4). Select an *Envelope Size*, and if necessary, change any of the other options; choose OK to display the *Envelope Address* dialog box (fig. 5).

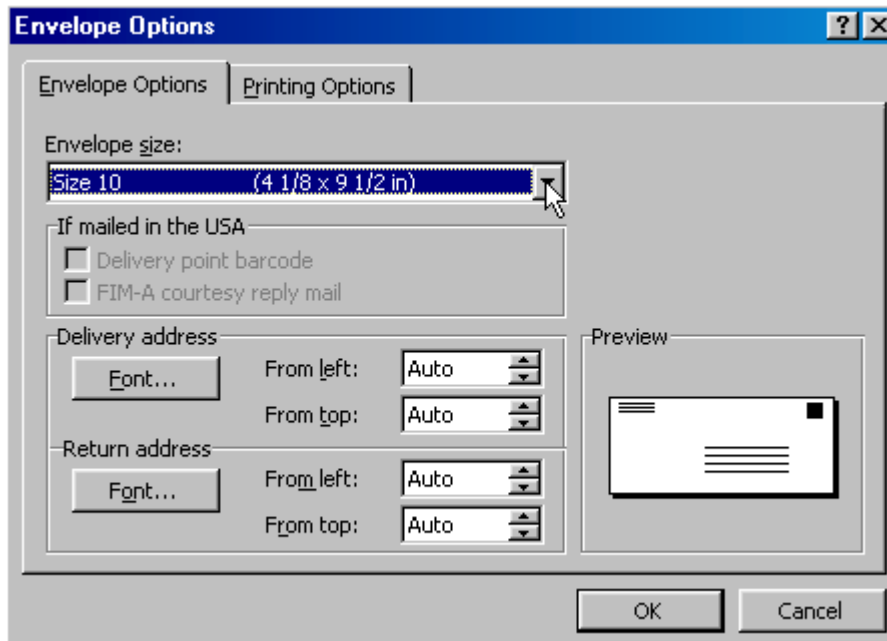


Fig. 4. Envelope Options dialog box.

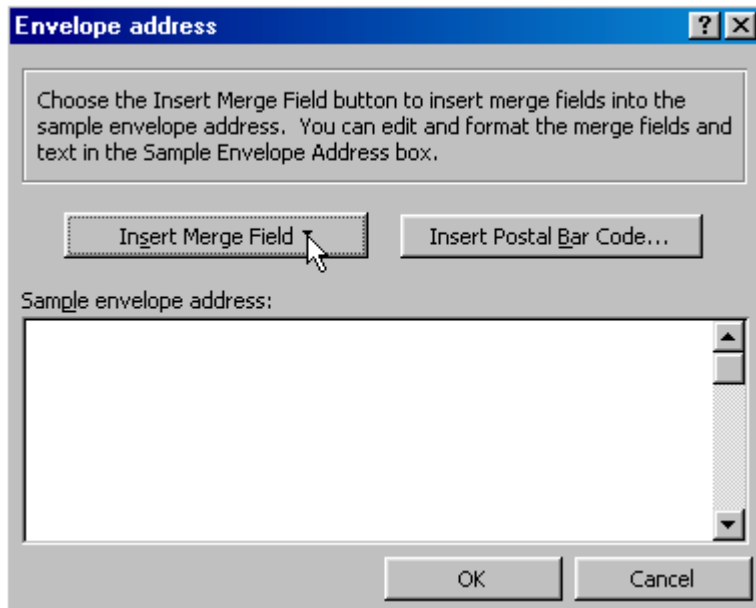


Fig. 5. Envelope address dialog box.

4. Insert the appropriate merge fields in the *Sample Envelope Address* text box using the *Insert Merge Field* button. Choose the *Insert Postal Bar Code* if you want Word to insert the POSTNET bar code on the labels, then choose OK.
5. Proceed with the merge options under Step 3 Merge the Data with the Document.

Creating Mailing Labels

If you are sending many documents, mailing labels can save you lots of time. You can design a form that prints multiple labels on a page similar to the way you design a form letter. You will need to create a data source (a location for names and addresses) before you complete this.

1. Choose Tools, *Mail Merge*. (Unlike other mail merges, the main form letter document does not need to be active.) Click the *Create* button under Step 1 *Main Document*, select *Mailing Labels*, then select either the *Active Window* or *New Main Document* button.
2. Click the *Get Data* button under Step 2 *Data Source*, and then select *Open Data Source* to find the data source file. Select the file and choose *Open*.
3. Click *Set Up Main Document* to display the Label Options dialog box (fig. 6). Select a label format from the *Product Number* list box, and if necessary, change any of the other options. Choose OK to display the *Create Labels* dialog box.

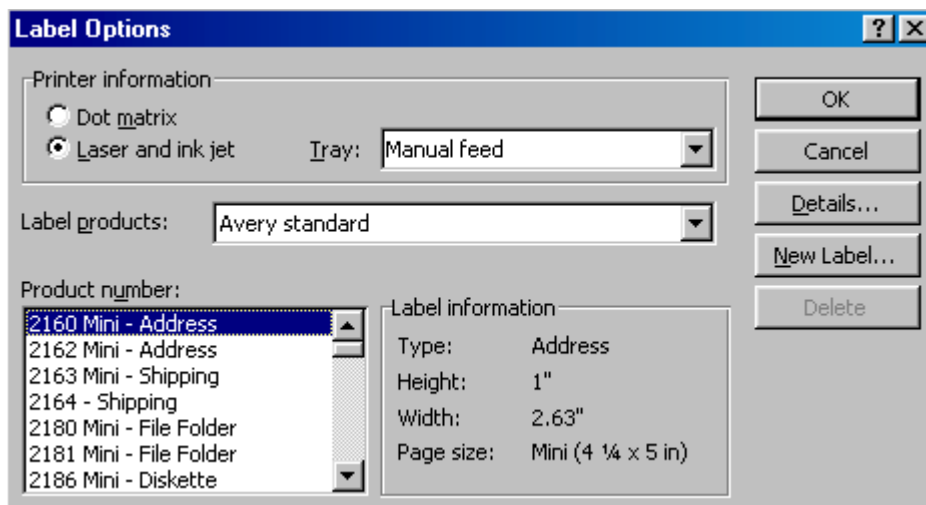


Fig. 6. Label Option dialog box.

4. Insert the appropriate merge fields in the *Sample Label* text box using the *Insert Merge Field* button. Use the *Insert Postal Bar Code* if you want Word to insert the POSTNET bar code on the labels, and then choose OK
5. Proceed with the merge options under Step 3 Merge the Data with the Document.

Finding Records

You must first have created a data source (a location for your names and addresses) before you do this task (see "Creating Data Source"). You must also be in the main document before you do this task. After you have created a data source in Word, you may need to find specific records to edit the information. Perhaps the address of one of your clients changed. Perhaps you received a "Return to Sender" notice from your last mailing. These are some examples of when you would want to find specific records in your mail merge.

1. To go to the data source, you can do one of two things depending on where you are. With the main document open, choose the *Edit Data Source* button on the Mail Merge toolbar. Or, from the Mail Merge Helper dialog box, choose *Edit* under Step 2 Data Source and then click the file name.
2. Choose the *Find* button to display the Find in Field dialog box.
3. In the *Find What* text box, type what you are searching for. In the *In Field* list box, select the field name that contains the information you are searching for.
4. Click the *Find First* button, examine the record, then click the *Find Next* button to continue the search. Choose Close when you are finished searching. .
5. When you get to the record you need to edit, move through the *Data Form* dialog box with the Enter, Tab, and Shift+Tab keys.
6. Click OK when you are finished editing information.