## Mail Merge – Microsoft Word and Excel Queries

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This session is an introductory course into the features and functions offered by the MS Query component of Microsoft Excel and linking the query to a Mail Merge Document created in Microsoft Word.

- Enabling Database connections through Microsoft Excel
- Accessing the data stored in the SQL Database via the MS Query Tool.
- Preparing a Word Document for use in a Mail Merge
- Defining Fields for use in the Merge Document
- Selecting Records for the Mail Merge
- Finalizing the Mail Merge and printing the Document
- Creating Labels through Mail Merge Function

The first step in creating a mail merge is defining the Data Source. In these examples, we will create a simple query using Microsoft Excel and the MS Query tool to mine the data for the Mail Merge.

Open Excel and access the DATA tab. Select Get Date – from Other Sources – From Microsoft Query.



Select the Database from the available data connections. (If the Use Query Wizard option is checked, uncheck it now)

Choose Data Source	
Databases Queries OLAP Cubes	OK
CAS_FBG*	Cancel
CAS_PAL* Cas_Phase* CAS_PMGT*	Browse
CAS_RUST*	Options
CAS_SENCO* CAS_SGCC*	<u>D</u> elete
Use the Query Wizard to create/edit queries	

Log in with the appropriate user ID and Password for the selected Database.

SQL Server Lo	gin	X		
Data Source:	Cas_Scott	ОК		
□ <u>U</u> se Trusted	Use Trusted Connection			
Login ID:	dba	<u>H</u> elp		
<u>P</u> assword:	**********	Options >>		

Select the appropriate Table from the "Add Tables" list. In this example, we are going the choose the CUSTOMERS table.

🖀 Microsoft Query	
File Edit View Format	Table Criteria Records Window Help
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Query from Cas_Sc	ott
customers	Add Tables
address_1 address_2	Table: Add
billing_cycle_id billing_cycle_n billing_rate	accruals_d Close
	adjust_tc_earnings adjust_tc_misc
	Options
	Owner: <all></all>
	Database: Cas_Scott

Once the table has been selected, we will choose the appropriate fields from the table. Double click on the following fields within the table selection screen.

Customer\_id

Name

Address\_1

Address\_2

City

State

Zip\_Code

Contact

-	Query from (	Cas_Scott							
	ct billing_rate bypass_service_c certified_license city company_no contact company_no contact country credit_limit customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id customer_id	ustomers							
F	customer id	name	address 1	address 2	city	state	zip code	contact	A
	10	T&M Client CUSTOMER	123 Rockwood Drive		Cleveland	OH	44444	Mr Contact on T&M Clier	
	101	Westfield Insurance	1945 Root Road		Lorain	OH	44052	Brian Cancian	
	106	Advanced Communication	3221 Mary Lane		Shipstown	OR	89872	Joe Freeber	
	107	Document Control Custo	Make Changes		Bocky Biver	OH	44221	Jacob Harvey	
	108	Lien Job Customer	Lien Job Customer Addre		Leintown	CA	99932	Lein Customer Contact	
	109	CM Customer	4221 Biverwood Lane		Bocky Biver	0H	44221	Jacob Harvey	
	110	Hacker Owner Purchase	543 Breezewood Court	P.0. Box 1154	Bocky Biver	0H	44221	Jacob Harvey	
	111	TKNS	8789 Northwest Avenue		Bocky Biver	0H	44221	Brian Cancian	
	112	Engert T&M	9098 Sams Lane		Bocky River	OH	44221	Paul Reed Smith	
	113	2 Engert	332-11 GW Expresswau		Bath	OH	44221	Bill Schultz	
	114	ICON	1105 FM 107		Toledo	OH	44221	Brian Cancian	
	115	Century Fire Protection	Pinemeadow		Duluth	GA	33333	Mike Basil	
	116	Test Customer	115 Test Boad		Testville	TX	90989	Customer Contact	
	117	Systems Paving	90002 Walmar		Santa Ana	CA	99999	Brian Cancian	•
M	A Record:	<b>N</b>							

Once the fields have been selected, click the Return Data to Excel button on the toolbar.

🖀 Microsoft Query
File Edit <del>Misse F</del> ormat Table Criteria Records Window Help
Bi B
Cuery frontetum Data t
customers       billing_rate       bunass_service_charge

Place the Data in Cell A1 in the Excel Spreadsheet.

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File	File	Home	Insert	Page Layo	out F	ormulas	Data	R	eview	View
Paste	From Act	cess eb From	Import	Data	R	Conne Prope	, ections rties ?	∄↓ ⊠	A Z A	Filter
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- - -	<mark>8</mark> 9									

Your resulting data should look like the example below:

	A1 • ( fx customer_id •							
	А	В	С	D	E	F	G	H 🗖
1	customer_id 💌	name 🔤	address_1	address_2 🗾 💌	city 🔽	state 💌	zip_code 💌	contact
2	10	T&M Client CUSTOMER REC	123 Rockwood Drive		Cleveland	OH	44444	Mr Contact on
3	101	Westfield Insurance	1945 Root Road		Lorain	ОН	44052	Brian Cancian
4	106	Advanced Communications	3221 Mary Lane		Shipstown	OR	89872	Joe Freeber
5	107	Document Control Customer	Make Changes		Rocky River	ОН	44221	Jacob Harvey 🔳
6	108	Lien Job Customer	Lien Job Customer Address		Leintown	CA	99932	Lein Customer
7	109	CM Customer	4221 Riverwood Lane		Rocky River	ОН	44221	Jacob Harvey
8	110	Hacker Owner Purchases	543 Breezewood Court	P.O. Box 1154	Rocky River	OH	44221	Jacob Harvey
9	111	TKNS	8789 Northwest Avenue		Rocky River	ОН	44221	Brian Cancian
10	112	Engert T&M	9098 Sams Lane		Rocky River	ОН	44221	Paul Reed Smi

From the Data Tab on the ribbon, select Connections.

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File	File Home	Insert Page Lap	ut Fo	ormulas Data	eview	View	Developer	Add-Ins	Design			 ∾ (?) – ₽	23	
Paste *	From Access From Web From Text Sour	Other Existing Connections	All T	Connections Properties Edit Links	A A A A A	Filter	🕅 Clear 🐌 Reapply 🌠 Advanced	Text to Columns D	Remove Duplicates	ita Validation insolidate hat-If Analys	n ▼ 🗣 Gro � Un iis ▼ 🔠 Sul	oup · 부를 group · 루를 ototal		
Clipboa	Get Exter	nal Data	C	onnections	S	ort & Fil	ter		Data Tools		Ou	tline G		
L	A1	▼ (= f <sub>x</sub>	custo	Connections									~	
	A	В		Display all data	connections fo	r the	D		E	F	G	н	F	
	1 customer_id -	name		workbook.			address_2	💌 ci	ity 🔽	state 💌 z	ip_code 💌	contact	6I	
	2 10	T&M Client CUSTO	MER RE	Data connectio	ns are links to o	lata		С	leveland	OH 4	14444	Mr Contact on		
	3 101	Westfield Insuran	ce	outside of this i	outside of this workbook which			L	orain	OH 4	14052	Brian Cancian		
	4 106	Advanced Commu	nication	changes.				S	hipstown	OR 8	39872	Joe Freeber		
								-	1				1 11	

Select the Properties Button for the Selected Query.

Workbook Connec	tions		? 🔀
Name 🔺	Description	Last Refreshed	A <u>d</u> d
Query from Cas_Sco	tt		Remove
			Properties
			 Retresh V
			Manage Sets

On The Usage Tab of the Connections Properties box, Select "Refresh Data When Opening File"

<b>Connection Pro</b>	perties 🤶 🏹
Connection <u>n</u> ame: Description:	Query from Cas_Scott
Usage Definit Refresh control – Last Refreshed: I Enable back Refresh date W Refresh date workboo	ion ground refresh ry ou minute a when gpening the file data from the external d ta range before saving the k

On the Definition tab, Selecet the option to Save the Password with the query.

You will receive a friendly warning from microsoft about saving the password, click YES to save the password along with the query.

WI	a 🔣 i 🛃 🖻	Connection Pro	perties 🔹 🤶 🗙	oft Excel		
Fil	Workbook (	Connection <u>n</u> ame:	Query from Cas_Scott	? 🗙	loper	Add
Ê	Name 🔺 Ouery from	Description:		A <u>d</u> d	r	
Past *	Q	Usage <u>D</u> efinit	ion	Remove	inced	Text to Column
Clipbo		Connection type:	Database Query	operties		
L		Connection <u>fi</u> le:	Browse	<u>R</u> efresh 🔹		
			Always use connection file	age Sets	D	
	Locations whe	Connection <u>s</u> tring	DSN=Cas_Scott;Description=Cas_Scott (Foundation);UID=dba;;APP=Microsoft Office 2010;WSID=STK08;DATABASE=Cas_Scott;AnsiNPW=N		255_2	
	Click here to	Command type:	Sol			
м	icrosoft Exce	l				
	The p save I	assword is saved with the password?	out encryption in the Excel file, making your data less secure.	Are you sure you	u want to	
			Yes No			
	<u>Was t</u>	his information helpfu	2			
	14 116					_
	15 117		OK Cancel			
-	16 118	SLEWA	IL NICHEV LESU 4057 WOIL NOAU	-		

You may now save the Excel spreadsheet. This will become our data source for the Mail Merge Document in Word.

Make a note where the file is saved, as we will require this location in a Step in the future.

Open Microsoft Word and create a new document. You may also use an existing form or document. In the following steps we will create the merge fields within an existing document.

Once the Mail Merge is complete, the process will replace the merge fields with the appropriate fields from Foundation's database.

When creating the document, leave space for the Customer Name and address information, along with the Customer Contact information.



Once the document is created, we will initiate the Mail Merge Genie to step through the process of inserting the fields and attaching the data source (the Excel Spreadsheet created in the first step)

From the MAILINGS tab on the ribbon, select Step by Step Mail Merge Wizard.

You will notice a sidebar will appear on the right hand side of the document. We are on "Step 3" because we are adding merged fields to an already existing document.



Click on the BROWSE option in the Use an Existing List option on the right hand sidebar.

Browse to the Excel Document that was created to pull the Customer information.

Select Data Sou	rce			? 🗙
Look <u>i</u> n:	C 2011 CLEVELAND	~	<b>(</b> ) • [	< 🔛 🖬 •
My Recent Documents Desktop My Documents My Computer My Network Places	**\$11 Mail Merge         **\$11 UC Handout Template         **\$Customers Query         **\$IL MERGE RAW DOCUMENT         ************************************			

When you select the Excel File, Microsoft word will promt you to select which worksheet contains the data for the Mail Merge.

In this example, we will select the data table on Sheet1. Make sure the option "First Row of Data contains column headers" is checked.

Se	elect Table	•					? 🔀
	Name	Description	Modified	Created	Туре		
	III Sheet1\$		12:00:00 AM	12:00:00 AM	TABLE		
	🏼 Sheet2\$		12:00:00 AM	12:00:00 AM	TABLE		
	🎹 Sheet3\$		12:00:00 AM	12:00:00 AM	TABLE		
	د (						>
V	First row of	data contain:	s column heade	rs		ок	Cancel

Microsoft Word will show you a preview of the data selected from the data source.

There are options here to Sort and Filter the list.

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	<b>v</b>	name 💌 🔻	address_1 🛛 👻	address_2 🛛 👻	city 🔼	
Customers Query       ✓       T&M Client CUSTOMER REC         Customers Query       ✓       Westfield Insurance         Customers Query       ✓       Advanced Communications         Customers Query       ✓       Document Control Custo         Customers Query       ✓       Lien Job Customer         Customers Query       ✓       CM Customer         Customers Query       ✓       Hacker Owner Purchases         Customers Query       ✓       TKNS         Customers Query       ✓       Engert T&M         Customers Query       ✓       Engert         Customers Query       ✓       ICON         Customers Query       ✓       ICON         Customers Query       ✓       ICON		123 Rockwood Drive 1945 Root Road 3221 Mary Lane Make Changes Lien Job Customer Address 4221 Riverwood Lane 543 Breezewood Court 8789 Northwest Avenue 9098 Sams Lane 332-11 GW Expressway 1105 FM 107 Dipemeadow	P.O. Box 1154	Cleveland Lorain Shipstown Rocky River Leintown Rocky River Rocky River Rocky River Rocky River Bath Toledo Dodoth		
Customers Query.xlsx       Image: Sort         Image: Sort       Imag						

Click OK to return to the Merge Document.

In the Lower Right Hand Corner, Select NEXT: Write Your Letter.

Software User Conference. Details Below:		
Where : Cleveland, OH When : March 15 - 23, 2006	* \$	Step 3 of 6  Next: Write your letter
Please R.S.V.P. to Tim. Smith 1-800-246-0800 X 554 or email	• •	Next wizard step
Page: 1 of 1   Words: 47   🕉	🔲 🛱 尾 📜	≣ 100% —

Select the spot on the document where you would like to insert the first merge field. When ready, access the INSERT MERGE FIELD option from the MILINGS tab on the ribbon.

Click NAME to insert the Customer NAME field into the Merge Document.



The result should look like the example below.



Continue adding the rest of the fields. Remember, cursor placement is important for inserting the correct fields. You may add any required punctuation between the merge fields. (IE: City, State and Zip Code)



Now thet the appropriate fields have been selected, we may now complete the merge.

In the lower right hand corner, select Step 4 : Preview your Letters



You may preview the Merged document and cycle through the recipients on the list using the buttons on the right hand sidebar.



At this point, you may select individual recipients, or a number of recipients from the original data source by selecting the EDIT RECIPIENT LIST on the sidebar to the right.



The Mail Merge will create a document for any and all records that are selected with a checkbox in the Mail Merge Recipients window.

If you are satisfied with the layout of the merge document and the selected recipients, select step 5 of 6 / Next: Complete the merge.

- - -	Dear Jacob Harvey,		
	I would like to cordially invite you and your family to the First Annual Foundation Software User Conference. Details Below:	*	Step 5 of 6 Next: Complete the merge
	Where Cleveland OH		<ul> <li>Previous: while your letter</li> </ul>
<u>्</u> ष		P	
Page: 1 of 1	Words: 61 🥸	🗌 🗐 🗳 🚡	■ 100% - +



At this point, you may select the PRINT option. All of these merged documents will print.

If you are still unsure about the number of letters that will be printed, you may select the option to "Edit individual Letters".

You will be prompted to choose which records to merge. Select ALL to review all of the Merged documents / Recipients.





This will create a new document titled Letters1 with separate pages for all of the documents.

Note in this example that this has created a new document with 63 individual pages based on the selected recipients. At this point you may edit the individual letters without effecting the main merge document.

You may also print certain pages from the merged document if you did not select the correct recipients.

You may save this document - this is not the merge file, it is the result of the Merged document.

If you save the original document, this file will be available to pull in the data from the linked Excel file at a later date.

When you re-open the document you will be prompted with a message that is a notification that the Word Document is linked to an external source.

Microsof	t Word 🔀
1	Opening this document will run the following SQL command: SELECT * FROM `Sheet1\$` Data from your database will be placed in the document. Do you want to continue? Show Help >>
	Yes No Help

Click YES to repopulate the Word Document with the list of recipients shown on the original Excel File. If new records have been added to Foundation, you will need to open the Excel document to refresh the query and pull in new records. Once the file has been opened, you may close the file and save the changes.

Once you have opened and refreshed the query in Excel, you should select Edit Recipient List to open the Recipient selection window.



Highlight the data source in the lower left hand corner and click the refresh button to update the recipient list.

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	•	name 🗸 🗸	address_1 🔹 👻	address_2 🛛 👻	city 🔼		
Customers Query		T&M Client CUSTOMER REC	123 Rockwood Drive		Cleveland 📄		
Customers Query		Westfield Insurance	1945 Root Road		Lorain 🔤		
Customers Query		Advanced Communications	3221 Mary Lane		Shipstown		
Customers Query	<b></b>	Document Control Custo	Make Changes		Rocky River		
Customers Query	<b></b>	Lien Job Customer	Lien Job Customer Address		Leintown		
Customers Query	<b>V</b>	CM Customer	4221 Riverwood Lane		Rocky River		
Customers Query	<b>V</b>	Hacker Owner Purchases	543 Breezewood Court	P.O. Box 1154	Rocky River		
Customers Query	<b>V</b>	TKNS	8789 Northwest Avenue		Rocky River		
Customers Query	<b>V</b>	Engert T&M	9098 Sams Lane		Rocky River		
Customers Query	<b>V</b>	2 Engert	332-11 GW Expressway		Bath		
Customers Query	<b>V</b>	ICON	1105 FM 107		Toledo 🤍		
Customers Ouerv		Century Fire Drotection	Dinemeadow		Duluth 🚬 💆		
5					2		
Data Source		Refine recipient list					
Customers Query, xis	5X	$\hat{\mathbf{z}} \downarrow \underline{\text{Sort}}$					
		Via Filter					
		<u>incorra</u>					
		🔰 🎦 Find duplicat	es				
Find recipient							
	Validate addresses						
Edit	Refre	esh					

You are now ready to complete the Mail Merge with the updated data. Click the Finish and Merge button to access options to print or save the merged document as a new file.



## Data Source Option #2 – Saving and accessing a Query.

Open the Excel Document that was created for the Customer list.



Right Click on a cell within the data table.

Choose Table / Edit Query to access the Query mode.

_				
	Microsoft Q	uery	- [Query from Ca	is_Scott]
D	🛅 File Edit Vi	ew F	ormat Table Crite	ria Records Window Help
ſ		• sq		
<u> </u>				
	customers		Save As	
	× .	~		
	address 1		Save in:	🕞 Queries 🔍 🚽 👘 🛛
	address 2		00/011.	
	billing cucle id			A Anne dela
	Filling_cycle_id			Esp AAnnandale
	Dilling_cycle_n			Book3 Sheet1 PivotTable4
	billing_rate	× .	My Recent	I CHANGE ORDERS
=		_	Documents	Customer Overv
_	customer_id			
	10	T&M		
	101	Wes		🖽 Query from Cas_Scott
	106	Adva	Desktop	Ouerv from Cas TAB
	107	Docu		Ouery from fci, dispetch
	108	Lien		me (act ) trout of appacent
	109	CM 0	1	
	110	Hack		
	111	TKN	My Documents	
	112	Enge		
	113	2 En		
-	114	ICON		

Once in the MS Query tool, select File / Save.

Name the query with an appropriate title that you will be able to locate later. Save it in the default folder if the file is to be used on a local workstation. If this document is to be shared, the Query file will need to be saved on a shared network drive.

Once the file is saved, close out of the MS Query tool and Close out of the Excel document.

Open the Mail Merge Document, and access the MAILINGS tab from the ribbon. Choose the Select Recipients / Use Existing List option.

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File Home	Insert	Page Layout References	Mailings Review View Developer Add-Ins		۵ 🕜
Envelopes Labels	Start Mail Merge *	Select Recipient List Merge F	t Address Greeting Insert Merge ids Block Line Field ≈ Block Li		
Create		Type <u>N</u> ew List	Write & Insert Fields Preview Results Finish		
L	. 1	Us <u>e</u> Existing List	······································		23
-		Select from Outlook Contacts.			

In the Select Data Source screen, choose the query that was just saved from the MS Query tool.

Select Data Sou	Irce			? 🔀
Look <u>i</u> n:	💼 My Data :	ources	(d) - 🚺	X 📷 🖬 -
My Recent Documents Desktop	AAnnanda Book3 She Customer_ Customer_ JOB BUDG Query from Query from Query from	o New Data Source Server Connection a th PivotTable4 Course Query tive2 Connection T Consection T Cas_TAB Cas_Scott Cas_Scott Cas_Scott fsi_dispatch		
	File <u>n</u> ame:		~	New Source
	Files of <u>type</u> :	All Data Sources	~	
Tools 🔹			Open	Cancel

Click OPEN in the lower right to select the data source.

You will be prompted to enter the user ID and password to access the query.

SQL Server Lo	gin	
Data Source:	Cas_Scott	OK
□ <u>U</u> se Trusted	Connection	Cancel
<u>L</u> ogin ID:	dba	Help
<u>P</u> assword:		<u>Options</u> >>

Microsoft Word will then prompt you to reopen the query every time the Mail merge document is opened. Click YES and continue with your Mail Merge.

Microsoft Word						
2	Do you want to have Word reopen Customer_Query every time Word needs to open your data source?					
	Yes No Help					
	Was this information helpful?					

The Data source is now connected to the Query as opposed to the Excel File. This removes the need to open and update the Excel File before opening the Mail Merge File.

Currently, there is no way to save the password within the query, so every time the Word Document is opened, you will need to enter the user ID and password to refresh the data within the query. You will be greated with the following message upon opening the file. Select yes, and then enter the password for the query to refresh the recipient list.

Which method is best ? It quite simply depends on which you are more comfortable with.

Microsof	t Word
1	Opening this document will run the following SQL command: SELECT customers.customer_id, customers.name, customers.address_1, customers.address_2, customers.city, customers.state, customers.zip_code, customers.contact FROM Cas_Scott.dbo.customers customers Data from your database will be placed in the document. Do you want to continue? Show Help >>
	Yes No Help
	Was this information helpful?

## Creating Mailing Labels through Mail Merge.

You may create Mailing Labels using the same Mail Merge Functionality. Create a new Query, or use an existing Data Query as the Data Source. For this example, we will use the Customer\_Query created for the previous lesson.

Start by accessing the Mailings tab from the Ribbon. Choose Start Mail Merge – and Select Labels.



Select the appropriate Label number from the available options. The lower right hand corner shows you the size and dimension of the selected label. Click OK to continue.

Label Options	? 🛛
Printer information         O Continuous-feed printers         Image printers	
Find updates on Office.com         Product number:         5931 Removable CD Labels         5960 Easy Peel Address Labels         5961 Easy Peel Address Labels         5962 Easy Peel Address Labels         5963 Shipping Labels         5966 Filing Labels	Label information         Type:       Easy Peel Address Labels         Height:       1"         Width:       2.63"         Page size:       8.5" × 11"
Details New Label Delete	OK Cancel

Your document will now be formatted in the selected label format.

Choose Select recipients – Use Existing List.



Select the appropriate Data Source and click OPEN in the lower right hand corner. Depending on the Data Source, you may receive a prompt to log into the query and / or you may be asked to Refresh the Query every time the file is opened.



Your documet will now look like the example below:

	4 5 6 7 8 -	Document1 - Microsoft Word	Table Tools	X & -
File Home F H Envelopes Labels Create	Insert Page Layout Refer	Address Greeting Insert Herge Highlight Address Greeting Insert Herge Wirte & Insert Fields Write & Insert Fields	Add_ns     Design     Lavout       I     I     I       ields     Preview       Labels     Preview       Preview     Auto Check for Errors       Preview Results	A 2 Finish & Merge → Finish . 
- - - -	₽ I	«Next Record»	«Next Record»	=
· · · ·	«Next Record»	«Next Record»	«Next Record»	



Now it is time to enter the Merge Fields. From the Ribbon, Select Merge Fields.

Select the required fields for your document. Note: spacing and font size may need to be adjusted to fit all of the data on the same label.



Once the layout is created, Select UPDATE LABELS from the Mailings Ribbon.

M M */ * O L 🖉 🕪 🛱 🔍 🔻	▼ 🔮 🗋 🎒 🆓 🛄   ▼ Document1 - Microsoft Word TableTools				
File Home Insert Page Layout F	eferences Mailings Review View I	Developer Add-Ins Design Layout	۵ 🕜		
Envelopes Labels Create	Highlight Address Greeting Insert Merg Nerge Fields Block Line Field Write & Insert Fields	Rules     Commandation     Rules     Commandation     Commandation	k *		
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<pre></pre>	«Next Record» »	«Next Record»	E		

Admittedly, the document doesnot look like much. Select the Finish & Merge option / Edit Individual Documents....



You will be prompted for what range you wish to view - select ALL and click OK

Merge to New Document 🛛 🛛 🔀				
Merge records	record			
O <u>E</u> rom:	OK Cancel			

Voila ! A new document is created with the Merged Recipients that you may save and print.



Remember to save the original document which is the template for the merge. This document will always be in a pending state, waiting for you to select the recipients for the merge.

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	<b>4</b>	This is the list of recipi checkboxes to add or	ents that will be used in your m remove recipients from the mer	erge. Use the options below to a ge. When your list is ready, click	dd to or change OK.	your list. Use the		
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Again, depending on the Data Source, you may be prompted for the user ID and login for the query. the alternate method explained in the original lesson would require you to open the Excel document to refresh the list BEFORE you open the Mail Merge File.

So, What can be done with Mail Merges ? Some examples that have been created for current Foundation Clients:

- Inventory Item Labes with Item ID / Decription / UPC Code / Bin Location
- Custom Subcontract Forms
- Employee / Job / Vendor file folder Labels
- Request for Certificates of Insurance from Vendors

- Job Folder Contact information Labels with Full address information of the Job and Customer with contact and order information.