Mail Merge – Microsoft Word and Excel Queries

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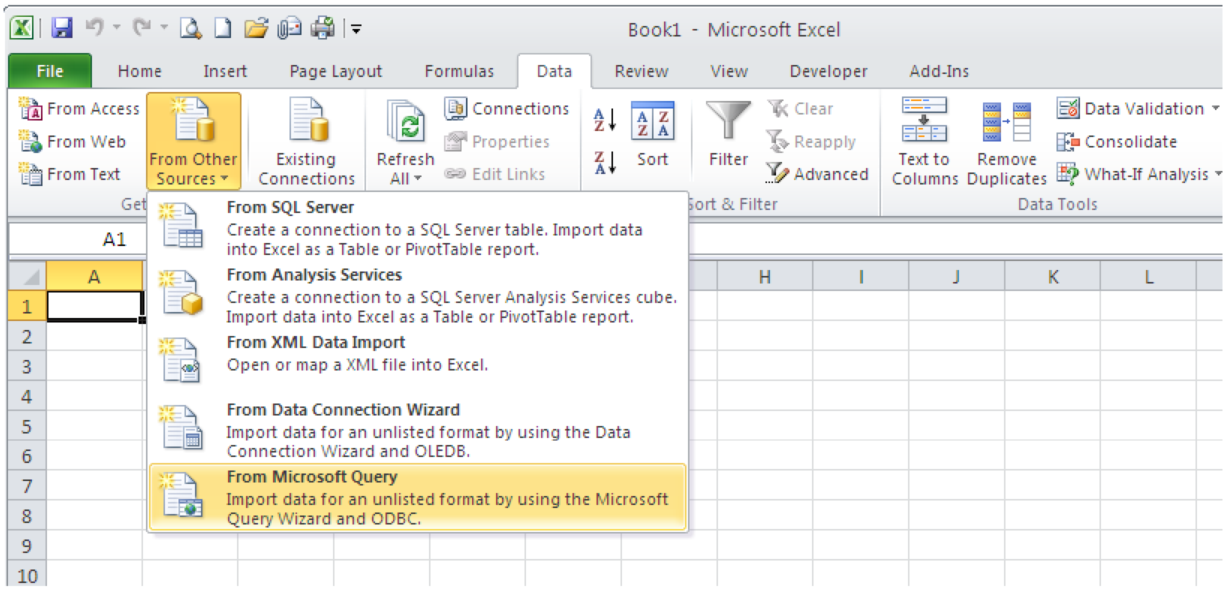
This session is an introductory course into the features and functions offered by the MS Query component of Microsoft Excel and linking the query to a Mail Merge Document created in Microsoft Word.

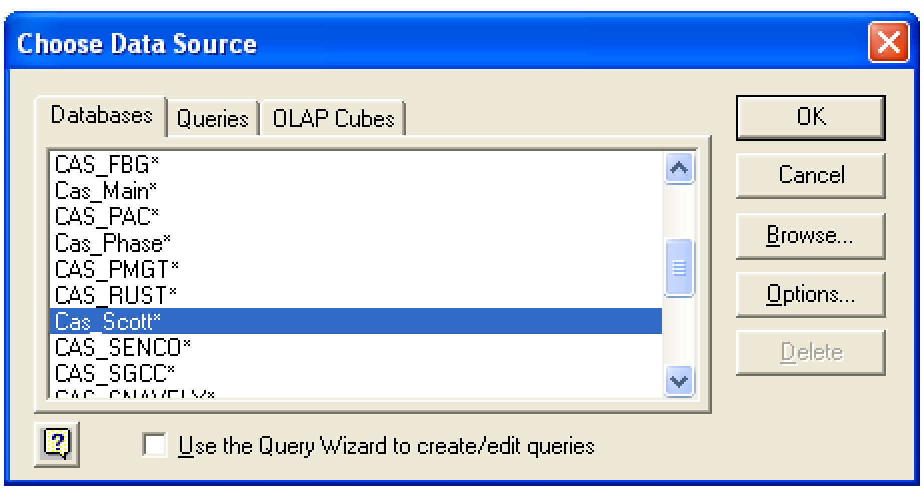
- Enabling Database connections through Microsoft Excel
- Accessing the data stored in the SQL Database via the MS Query Tool.
- Preparing a Word Document for use in a Mail Merge
- Defining Fields for use in the Merge Document
- Selecting Records for the Mail Merge
- Finalizing the Mail Merge and printing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

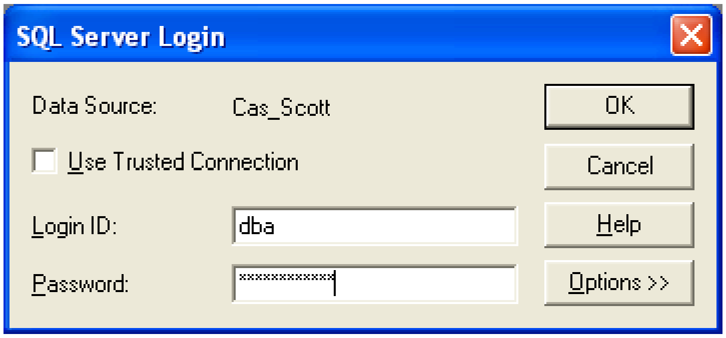
Open Excel and access the DATA tab. Select Get Date – from Other Sources – From Microsoft Query.



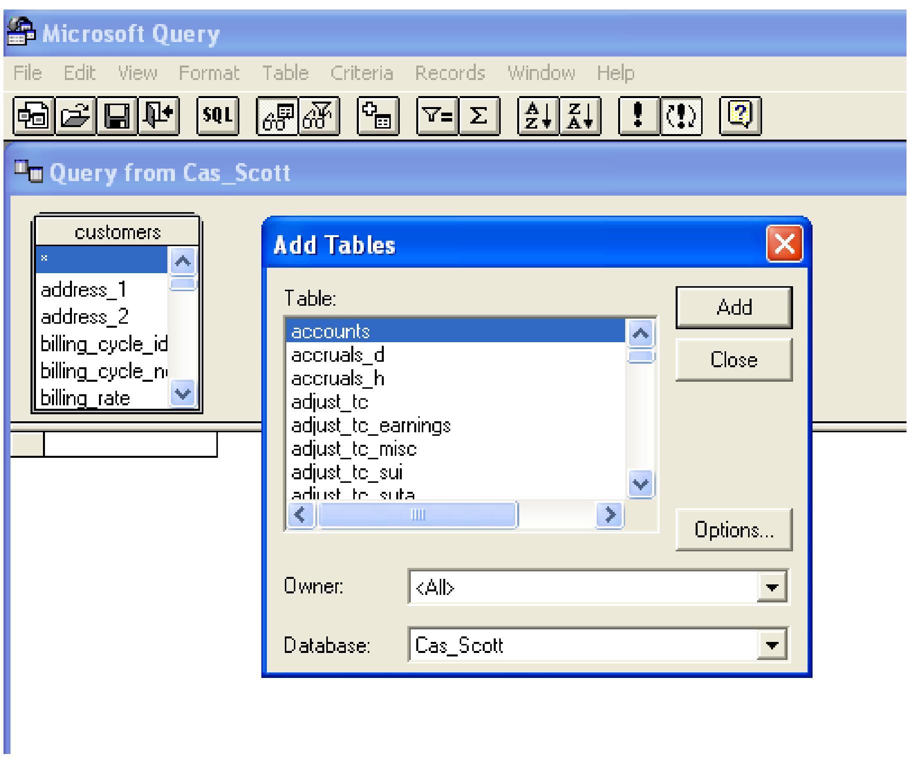
Select the Database from the available data connections. (If the Use Query Wizard option is checked, uncheck it now)



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



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



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

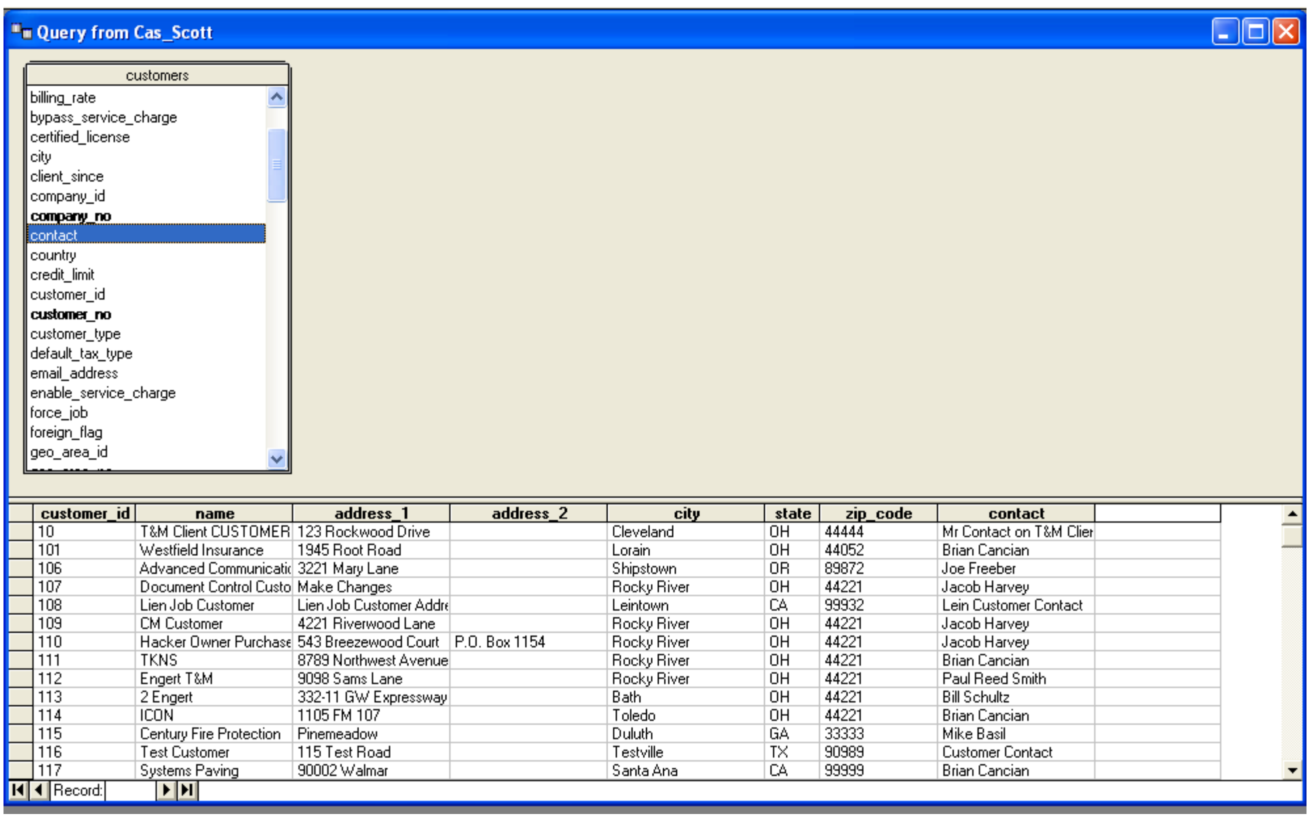
Address_2

City

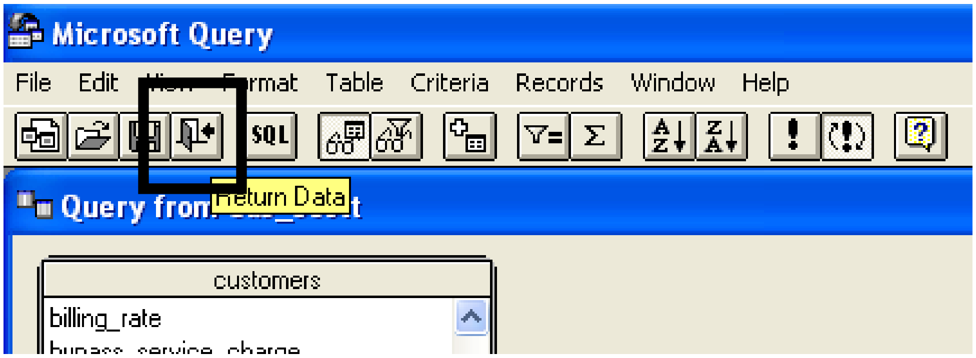
State

Zip_Code

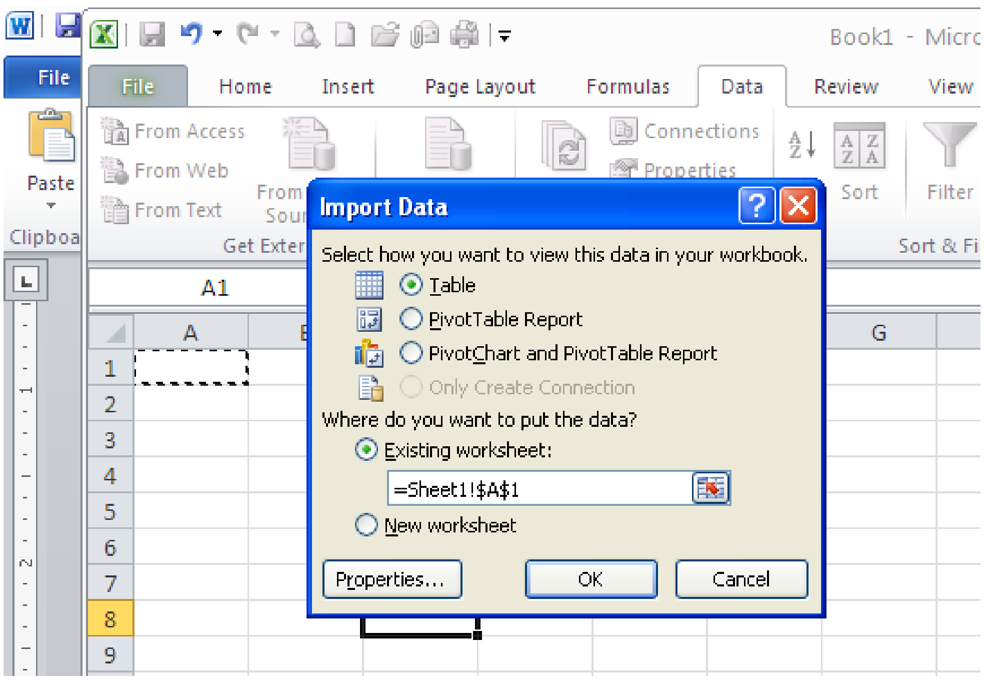
Contact



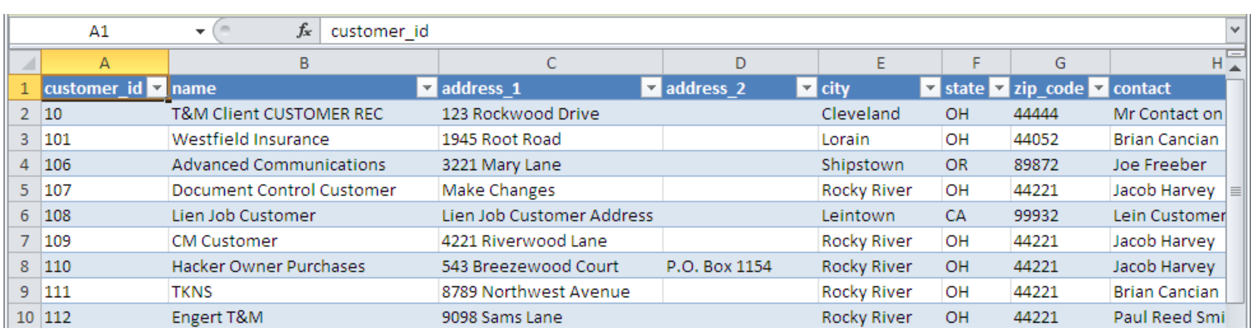
Once the fields have been selected, click the Return Data to Excel button on the toolbar.



Place the Data in Cell A1 in the Excel Spreadsheet.

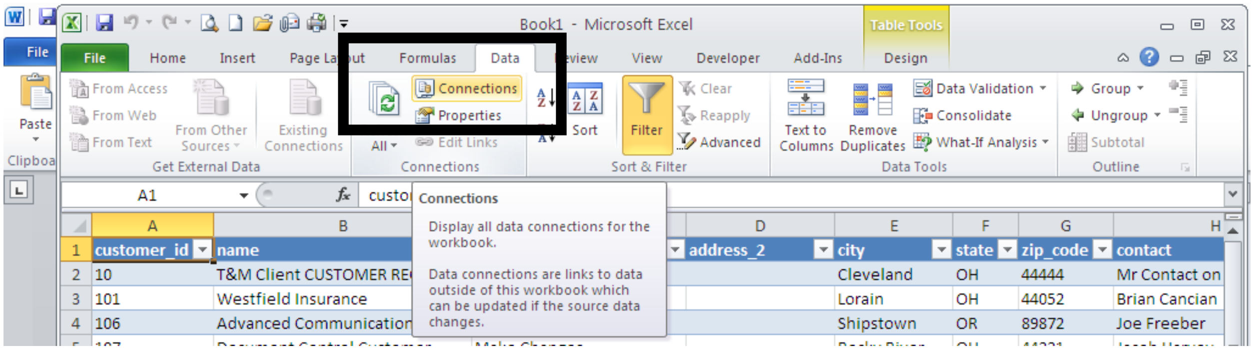


Your resulting data should look like the example below:

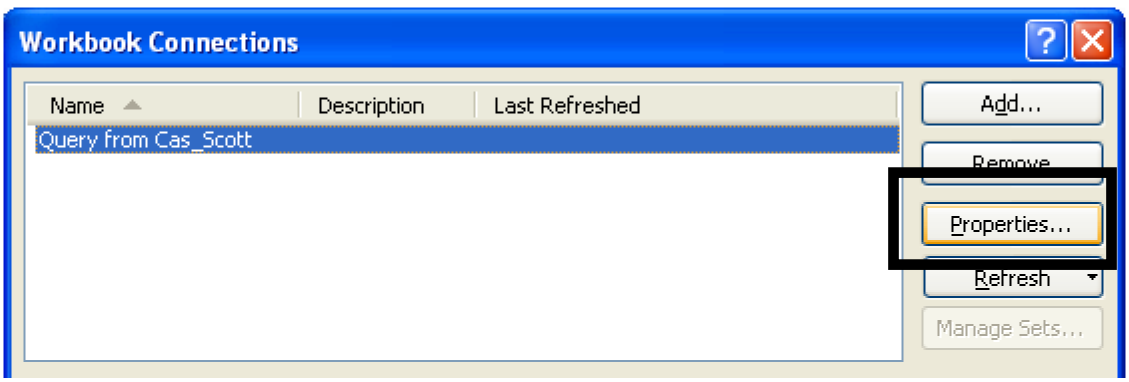


customer_id	name	address_1	address_2	city	state	zip_code	contact
10	T&M Client CUSTOMER REC	123 Rockwood Drive		Cleveland	OH	44444	Mr Contact on
101	Westfield Insurance	1945 Root Road		Lorain	OH	44052	Brian Cancian
106	Advanced Communications	3221 Mary Lane		Shipstown	OR	89872	Joe Freeber
107	Document Control Customer	Make Changes		Rocky River	OH	44221	Jacob Harvey
108	Lien Job Customer	Lien Job Customer Address		Leintown	CA	99932	Lein Customer
109	CM Customer	4221 Riverwood Lane		Rocky River	OH	44221	Jacob Harvey
110	Hacker Owner Purchases	543 Breezewood Court	P.O. Box 1154	Rocky River	OH	44221	Jacob Harvey
111	TKNS	8789 Northwest Avenue		Rocky River	OH	44221	Brian Cancian
112	Engert T&M	9098 Sams Lane		Rocky River	OH	44221	Paul Reed Smi

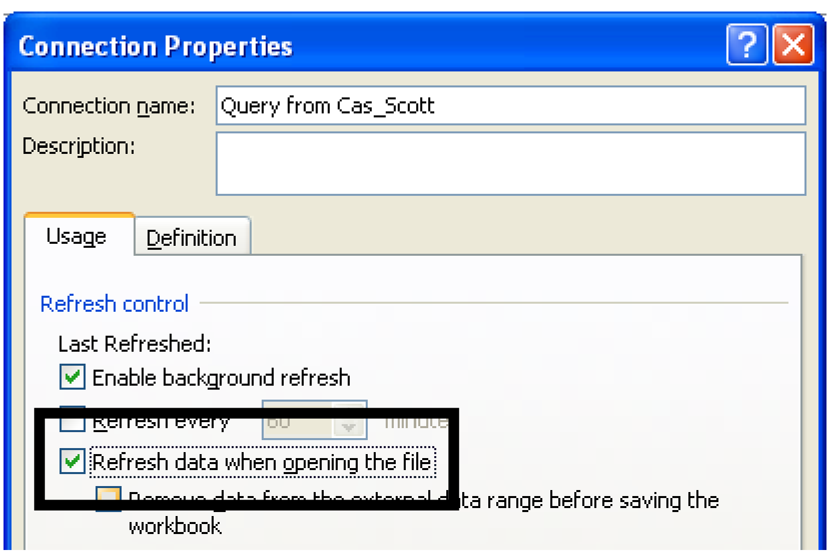
From the Data Tab on the ribbon, select Connections.



Select the Properties Button for the Selected Query.

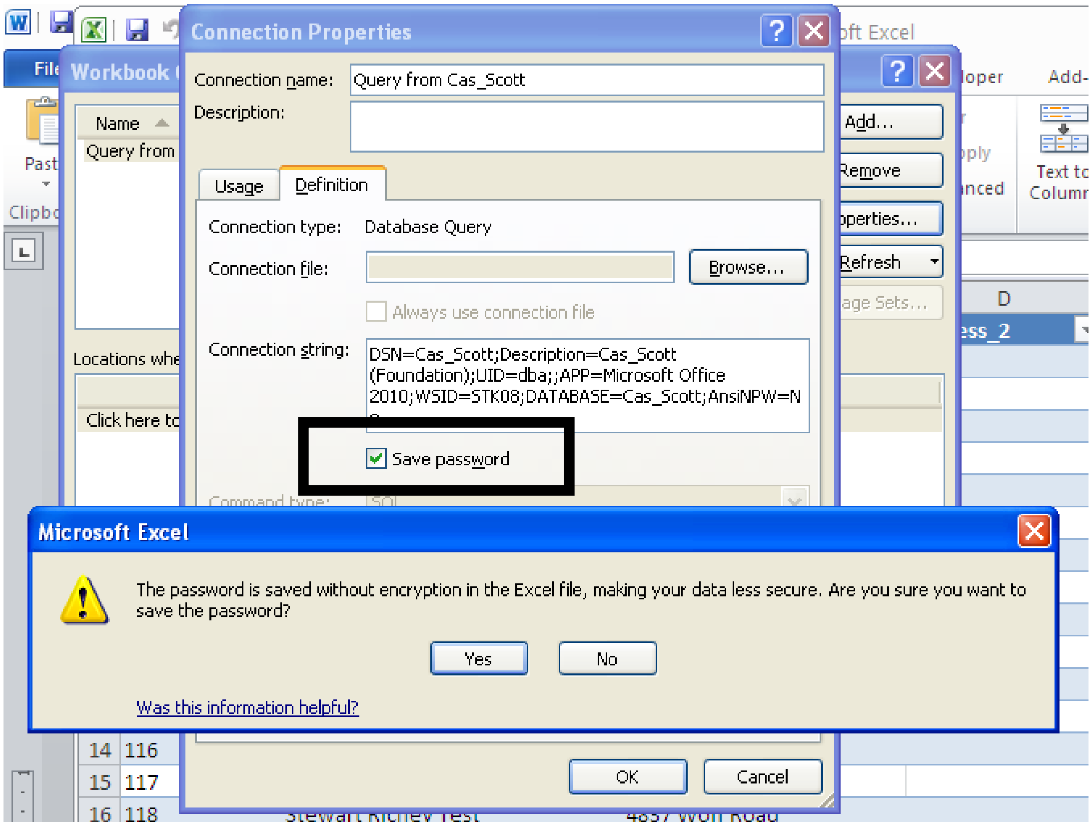


On The Usage Tab of the Connections Properties box, Select “Refresh Data When Opening File”



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.



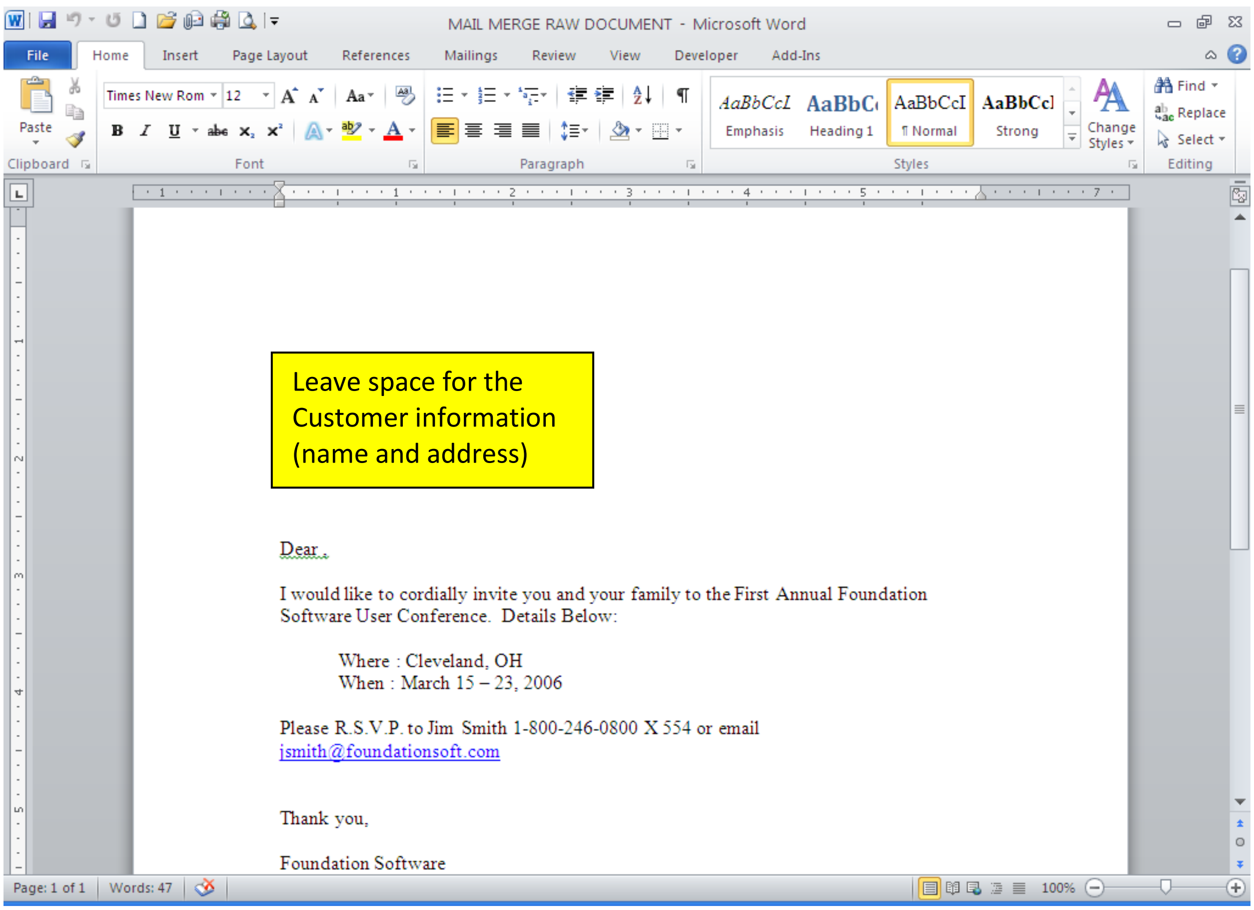
You may now save the Excel spreadsheet. This will become our data source for the Mail Merge Document in Word.

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.

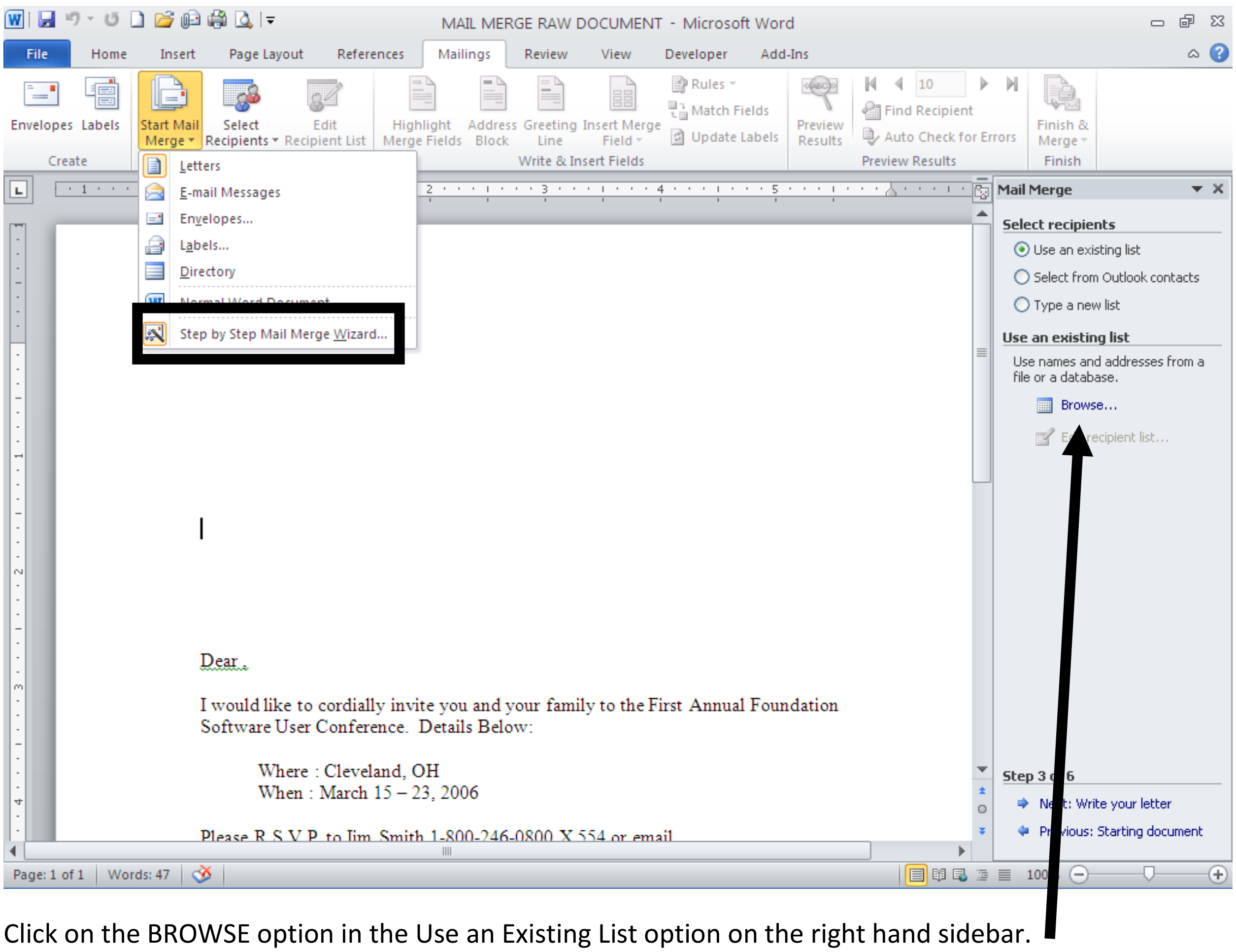
When creating the document, leave space for the Customer Name and address information, along with the Customer Contact information.



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)

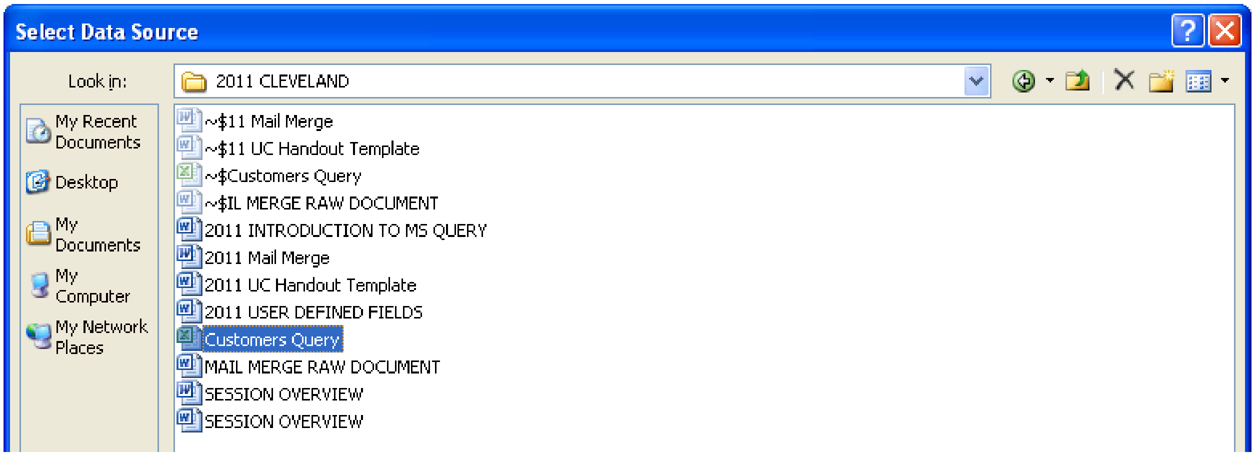
From the MAILINGS tab on the ribbon, select Step by Step Mail Merge Wizard.

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.



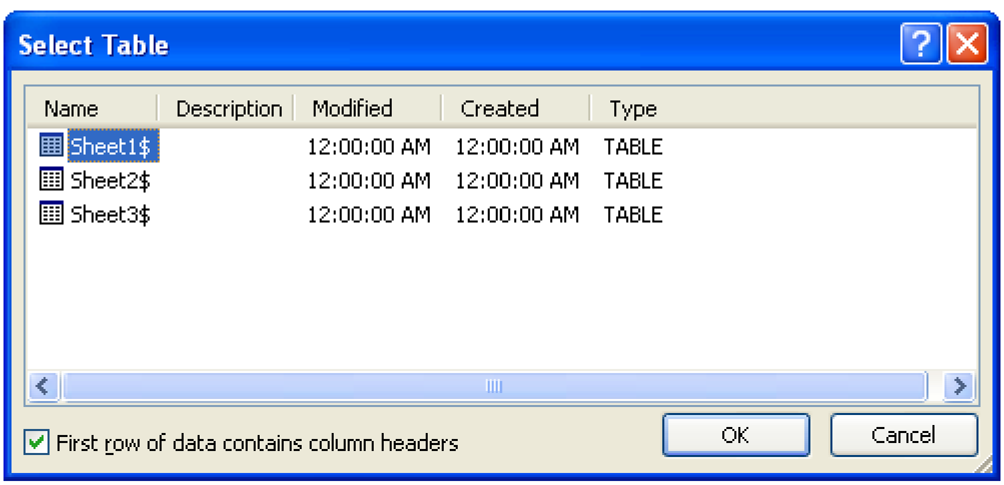
Click on the BROWSE option in the Use an Existing List option on the right hand sidebar.

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



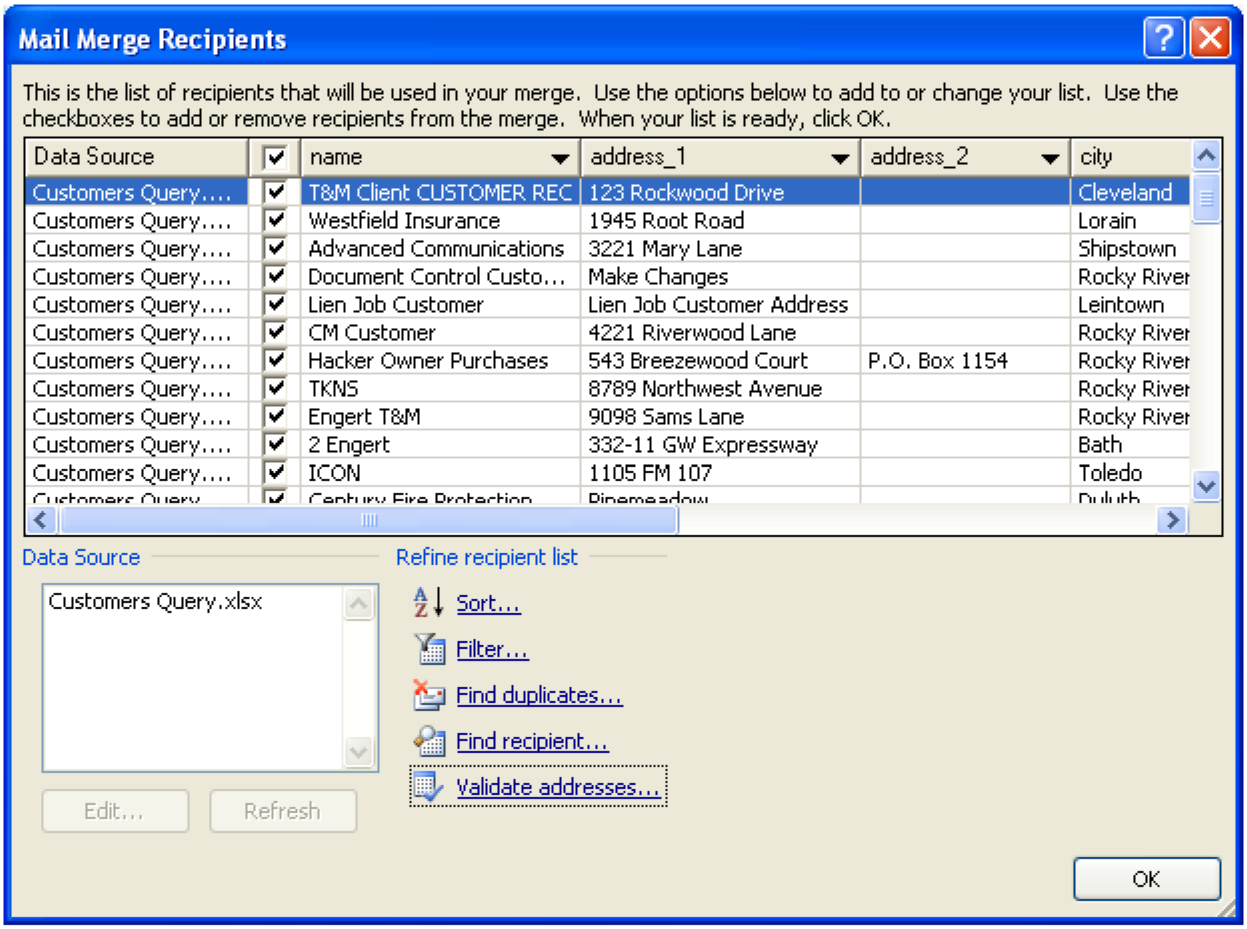
When you select the Excel File, Microsoft word will promt you to select which worksheet contains the data for the Mail Merge.

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



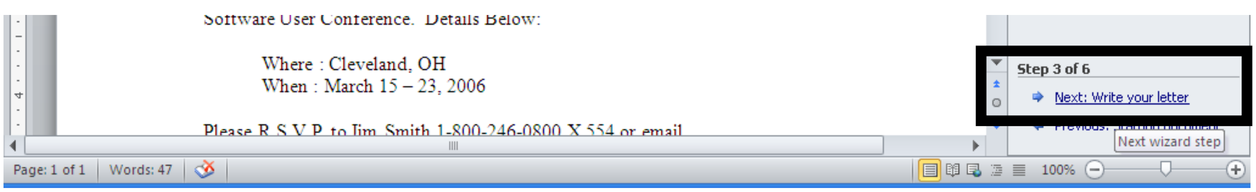
Microsoft Word will show you a preview of the data selected from the data source.

There are options here to Sort and Filter the list.



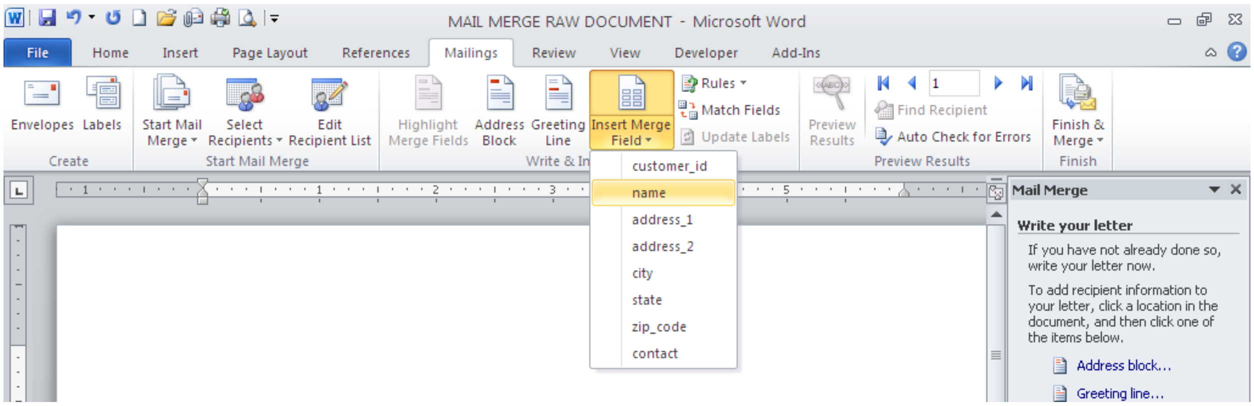
Click OK to return to the Merge Document.

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

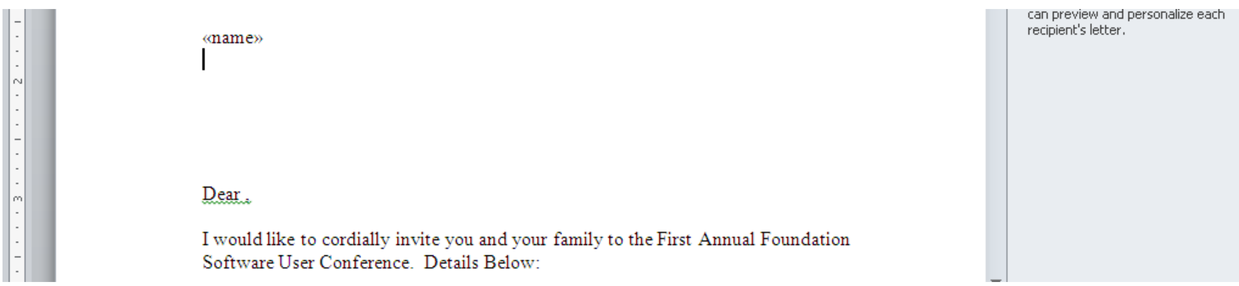


Select the spot on the document where you would like to insert the first merge field. When ready, access the INSERT MERGE FIELD option from the MILINGS tab on the ribbon.

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



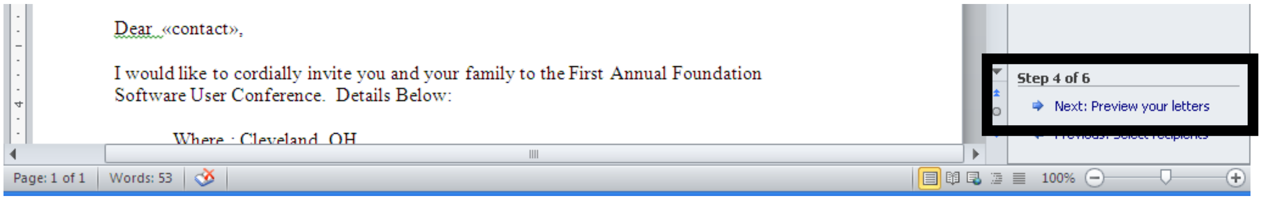
The result should look like the example below.



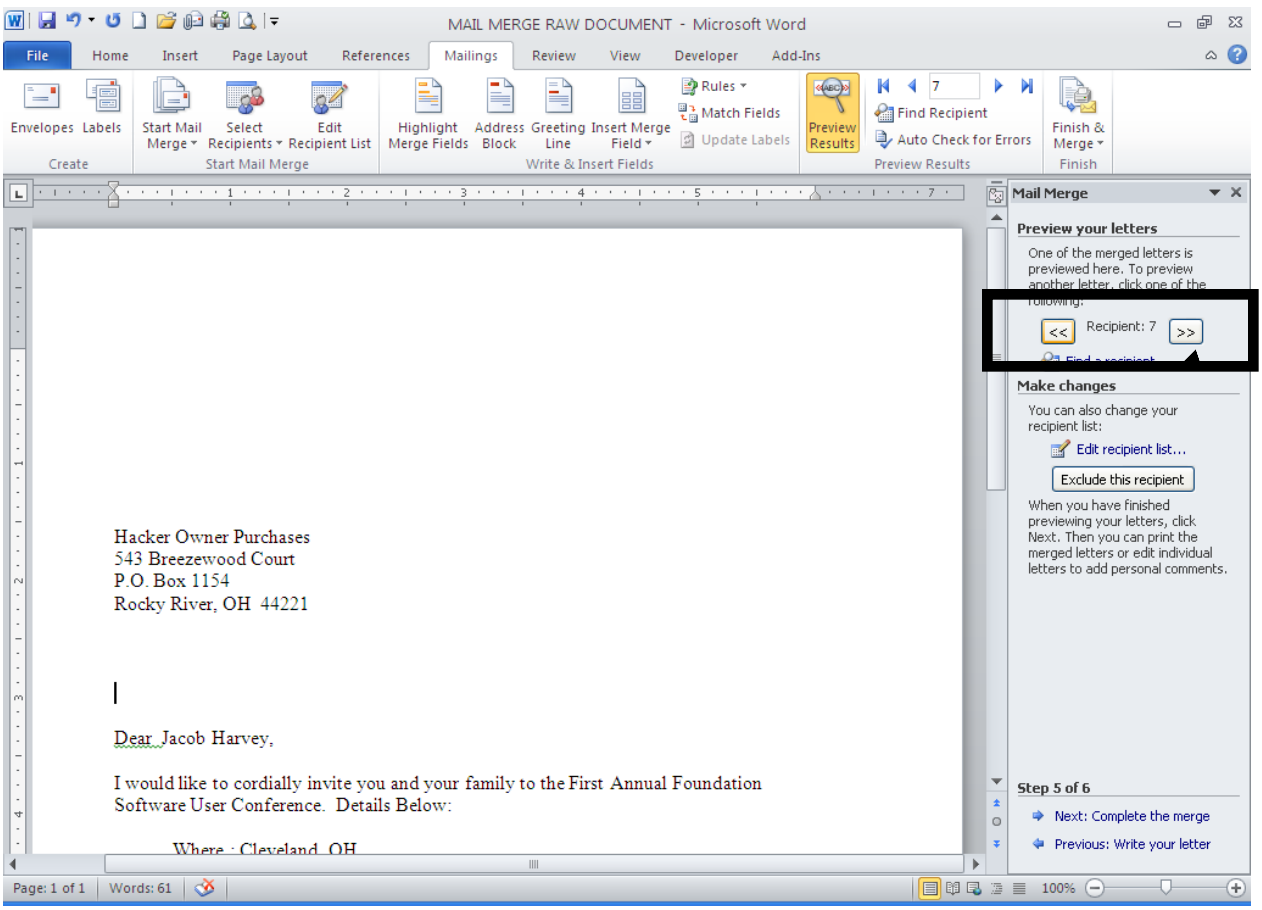
Continue adding the rest of the fields. Remember, cursor placement is important for inserting the correct fields. You may add any required punctuation between the merge fields. (IE: City, State and Zip Code)

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

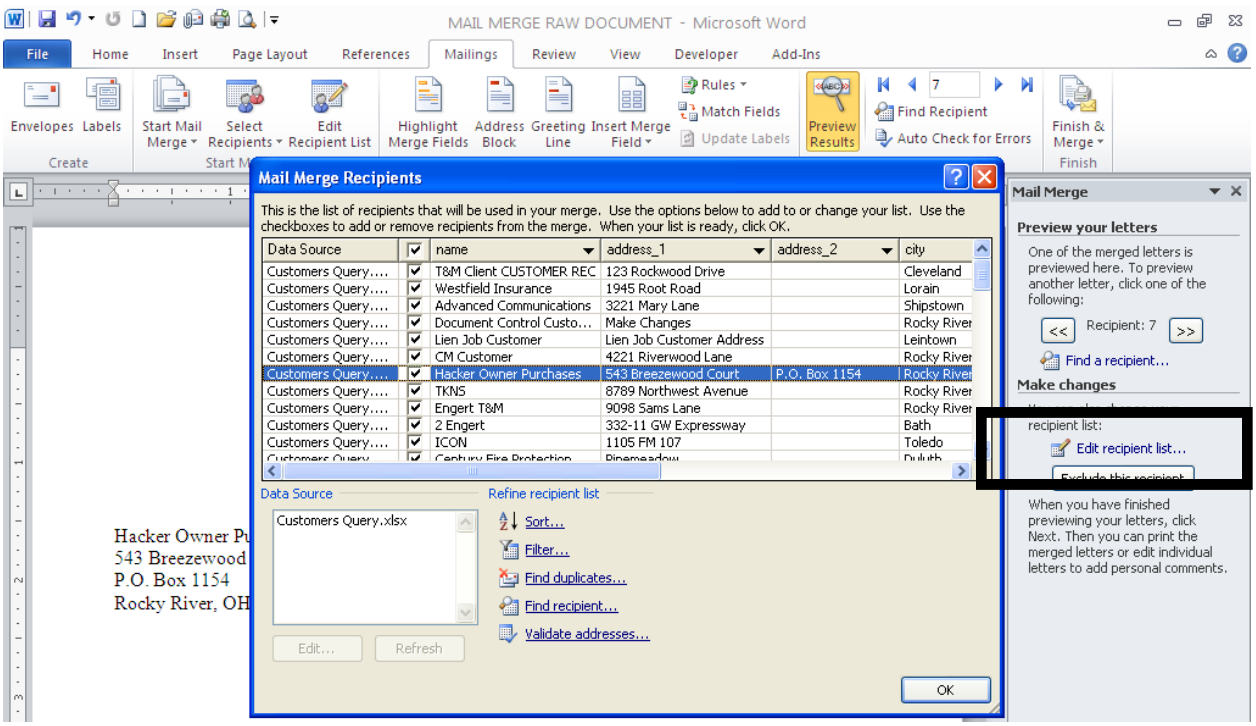
In the lower right hand corner, select Step 4 : Preview your Letters



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

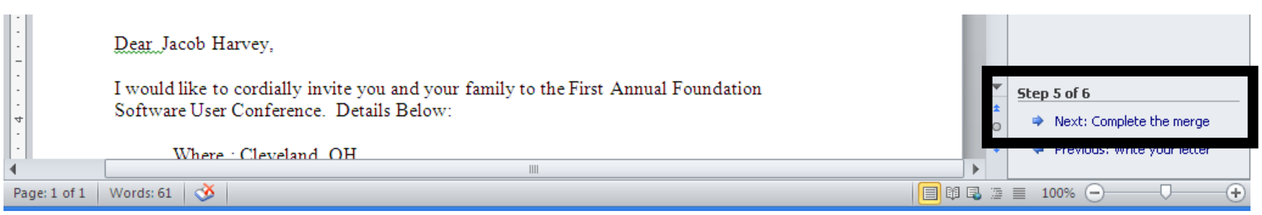


At this point, you may select individual recipients, or a number of recipients from the original data source by selecting the EDIT RECIPIENT LIST on the sidebar to the right.

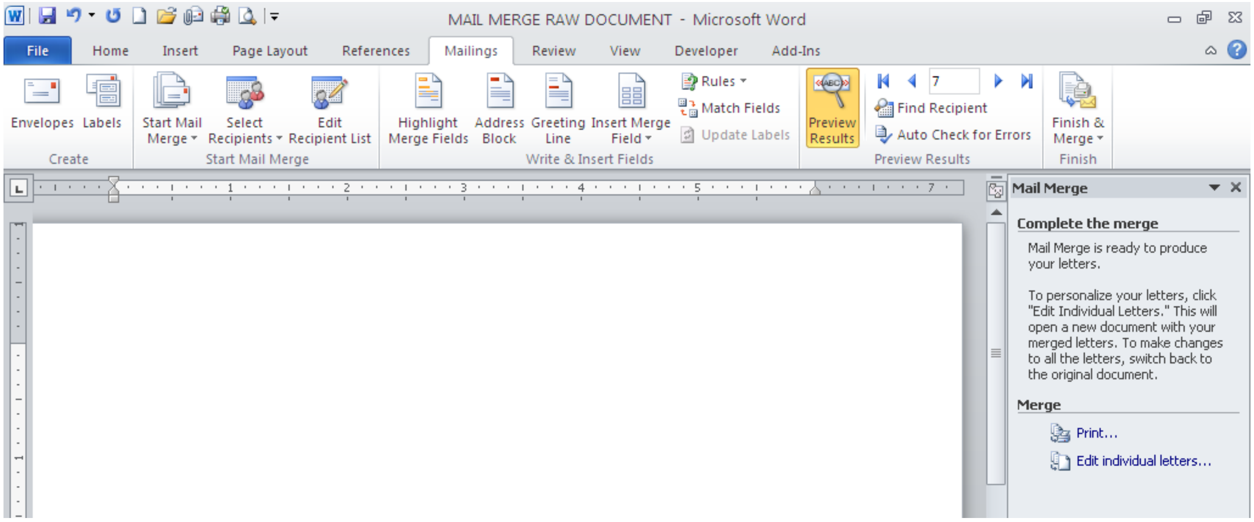


The Mail Merge will create a document for any and all records that are selected with a checkbox in the Mail Merge Recipients window.

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

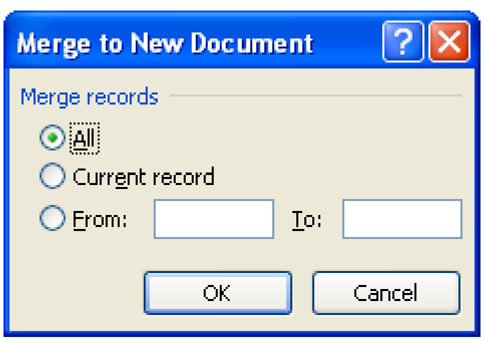


At this point, you may select the PRINT option. All of these merged documents will print.

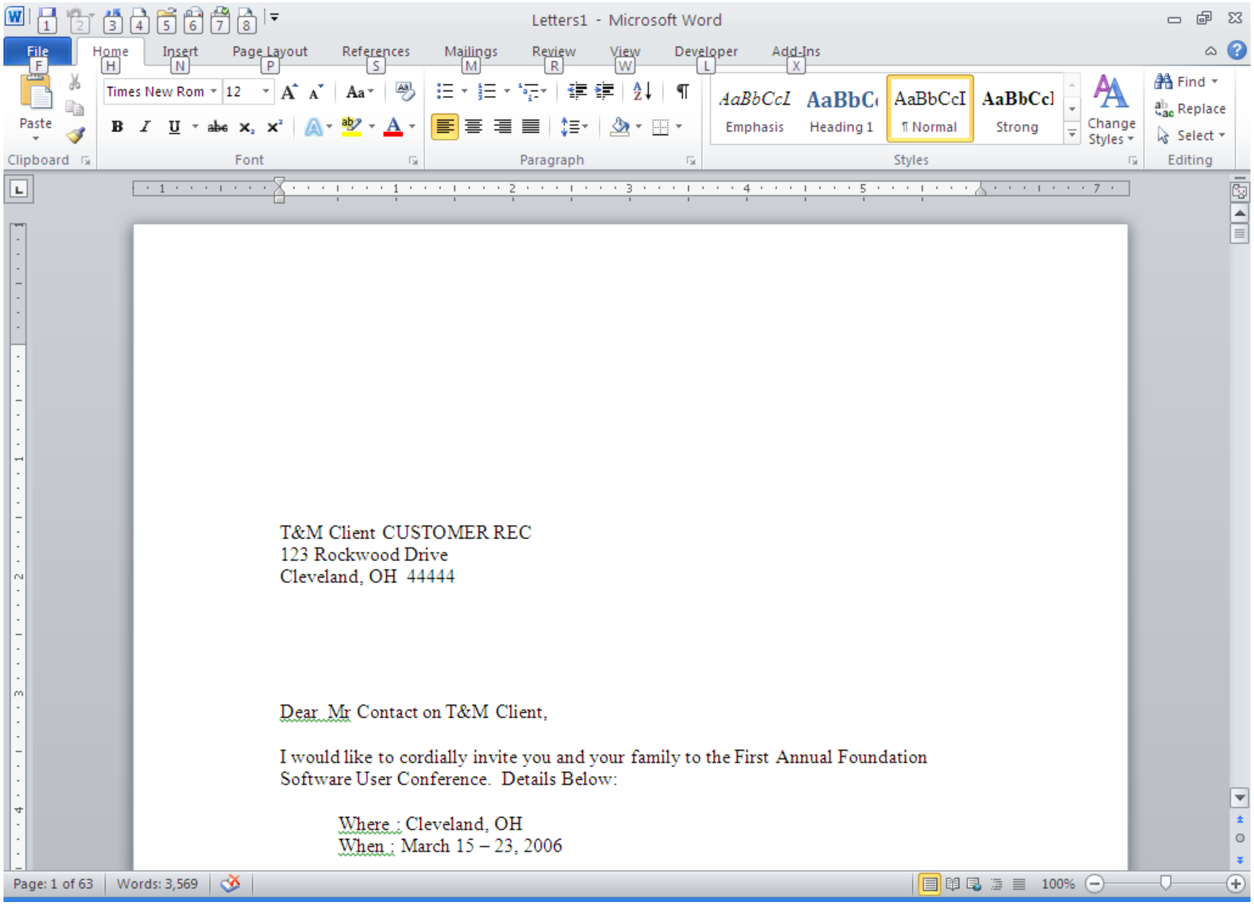


If you are still unsure about the number of letters that will be printed, you may select the option to "Edit individual Letters".

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.



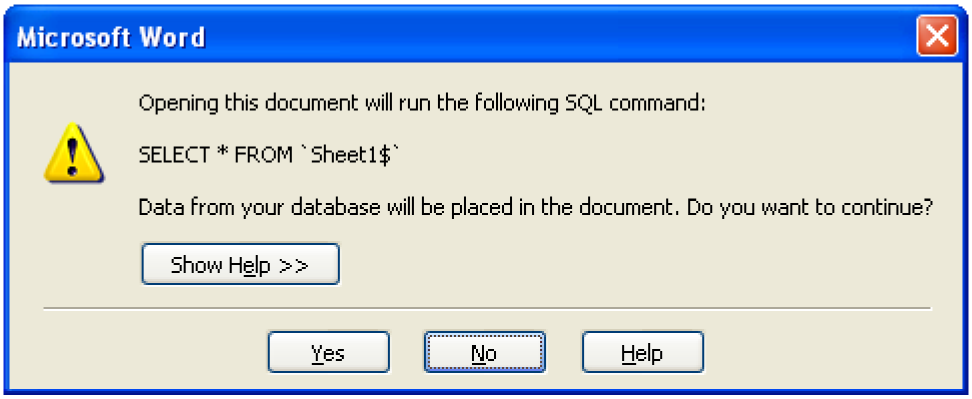
Note in this example that this has created a new document with 63 individual pages based on the selected recipients. At this point you may edit the individual letters without effecting the main merge document.

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.

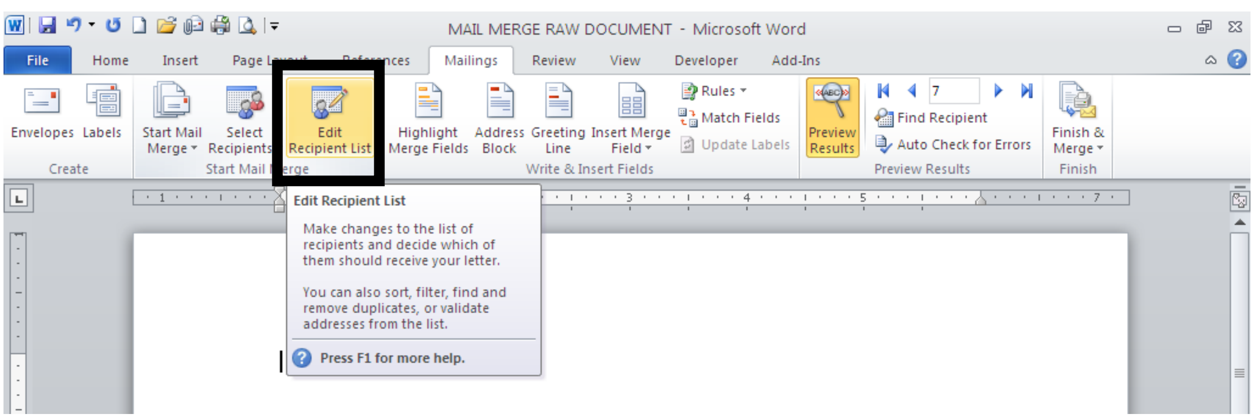
If you save the original document, this file will be available to pull in the data from the linked Excel file at a later date.

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.

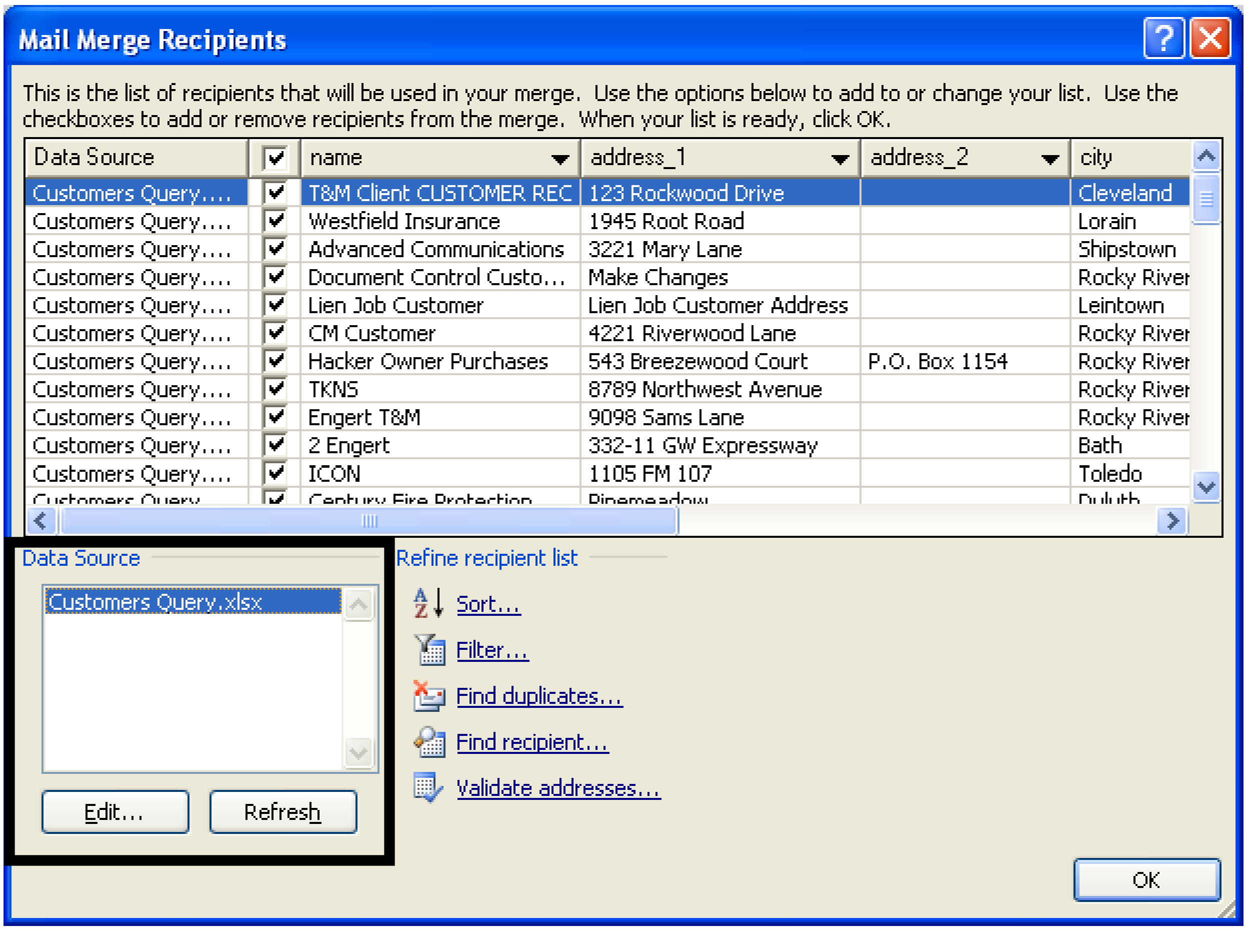


Click YES to repopulate the Word Document with the list of recipients shown on the original Excel File. If new records have been added to Foundation, you will need to open the Excel document to refresh the query and pull in new records. Once the file has been opened, you may close the file and save the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

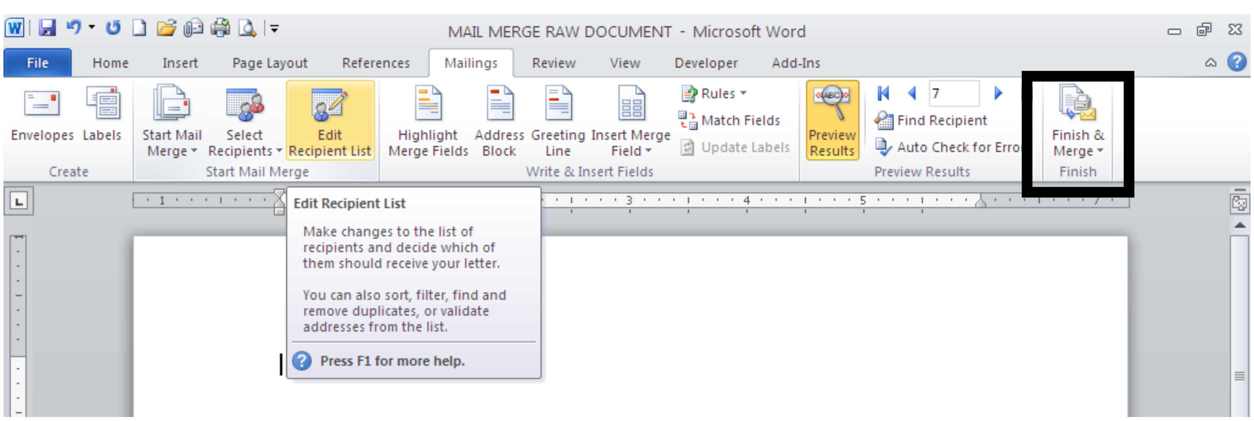
Once you have opened and refreshed the query in Excel, you should select Edit Recipient List to open the Recipient selection window.



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

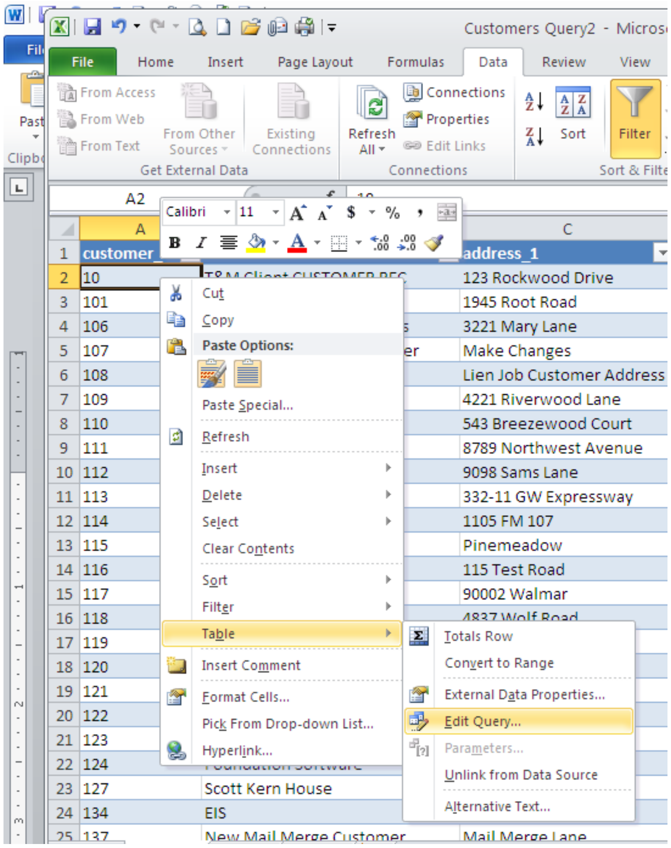


You are now ready to complete the Mail Merge with the updated data. Click the Finish and Merge button to access options to print or save the merged document as a new file.



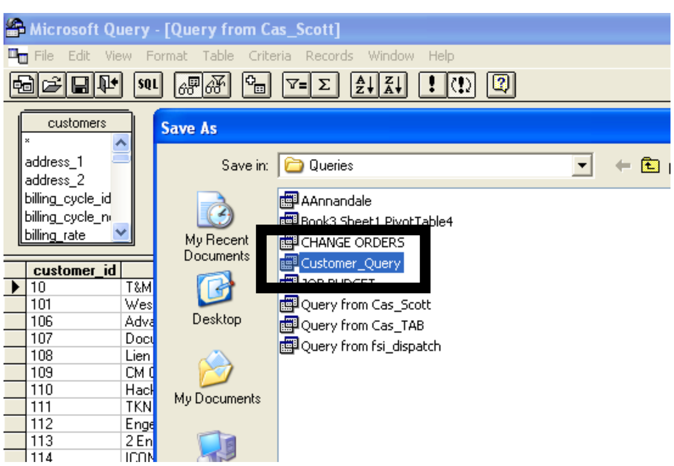
Data Source Option #2 – Saving and accessing a Query.

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.

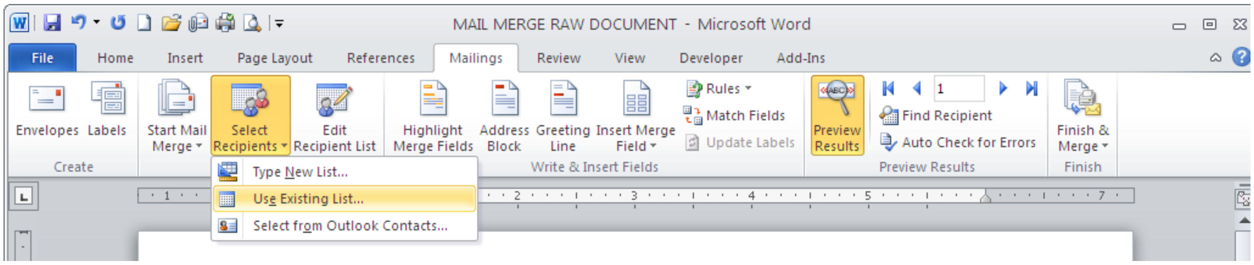


Once in the MS Query tool, select File / Save.

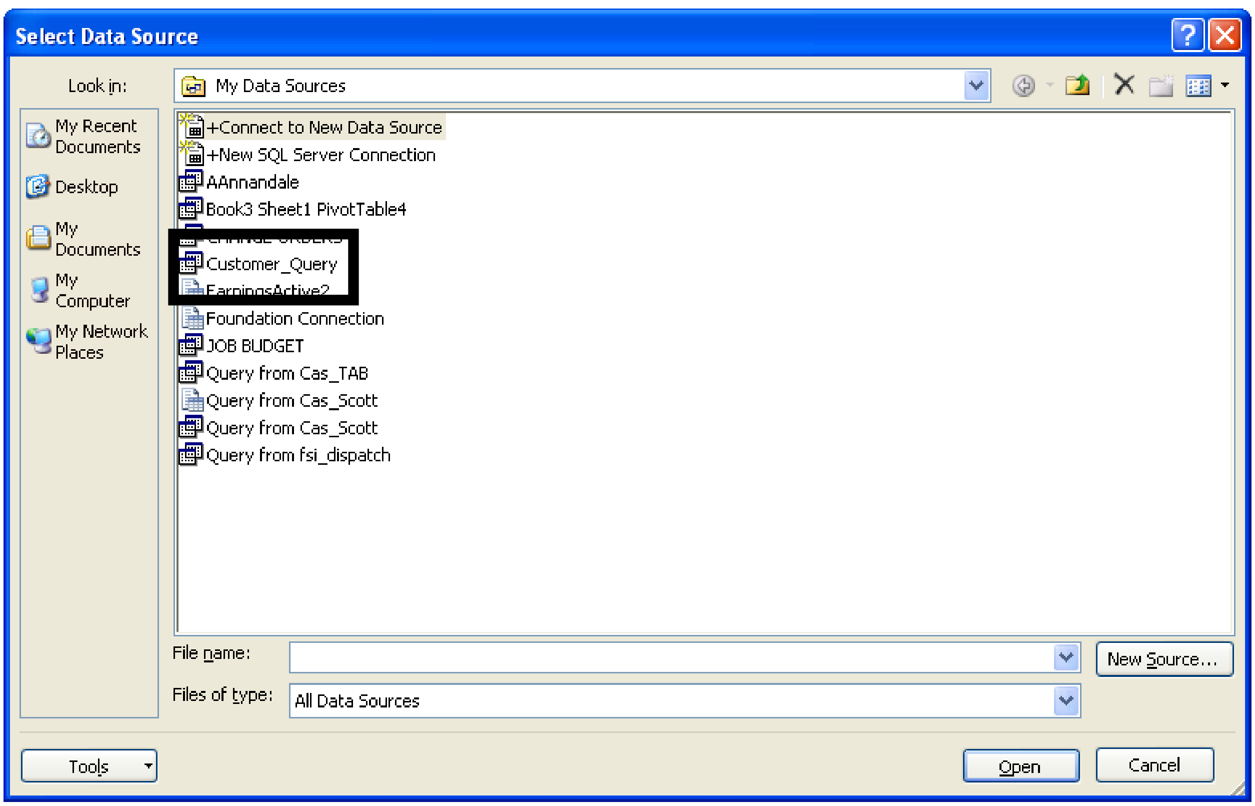
Name the query with an appropriate title that you will be able to locate later. Save it in the default folder if the file is to be used on a local workstation. If this document is to be shared, the Query file will need to be saved on a shared network drive.

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.

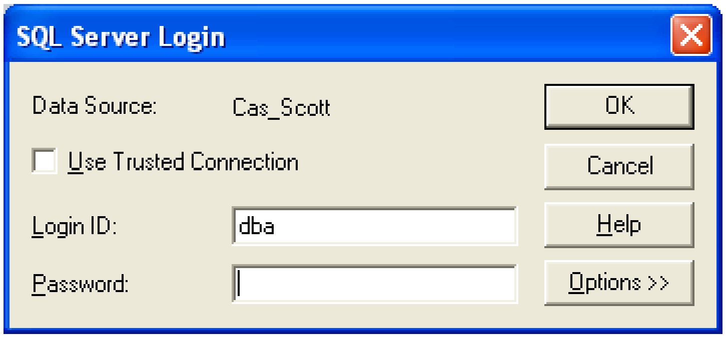


In the Select Data Source screen, choose the query that was just saved from the MS Query tool.

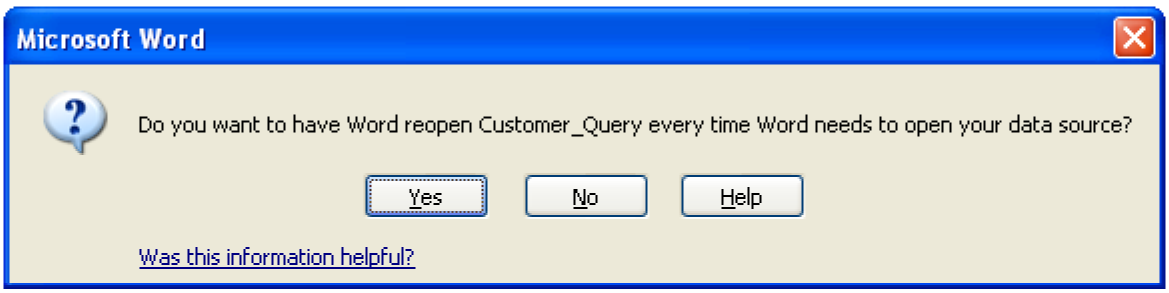


Click OPEN in the lower right to select the data source.

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



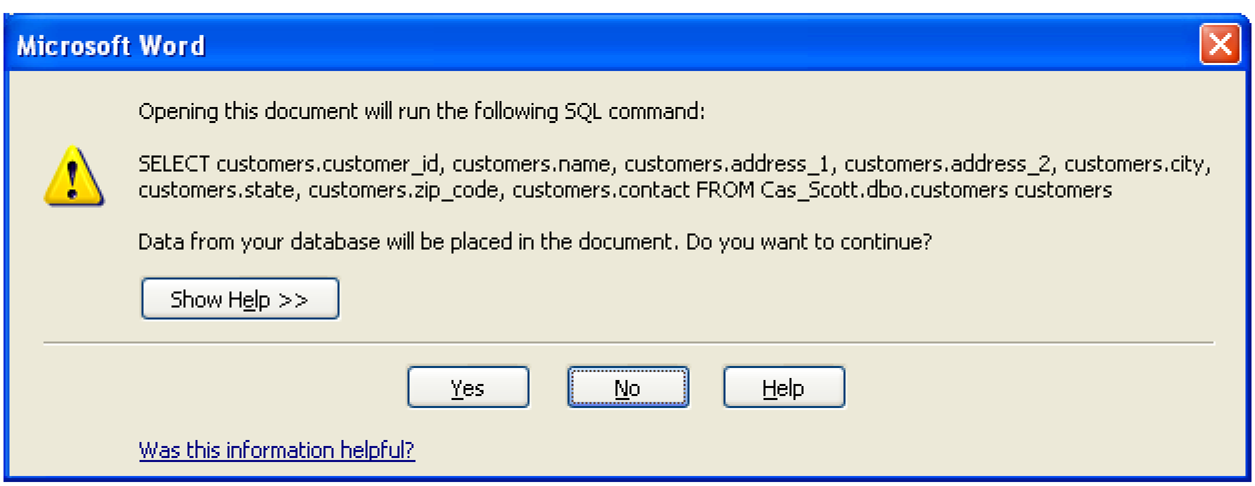
Microsoft Word will then prompt you to reopen the query every time the Mail merge document is opened. Click YES and continue with your Mail Merge.



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.

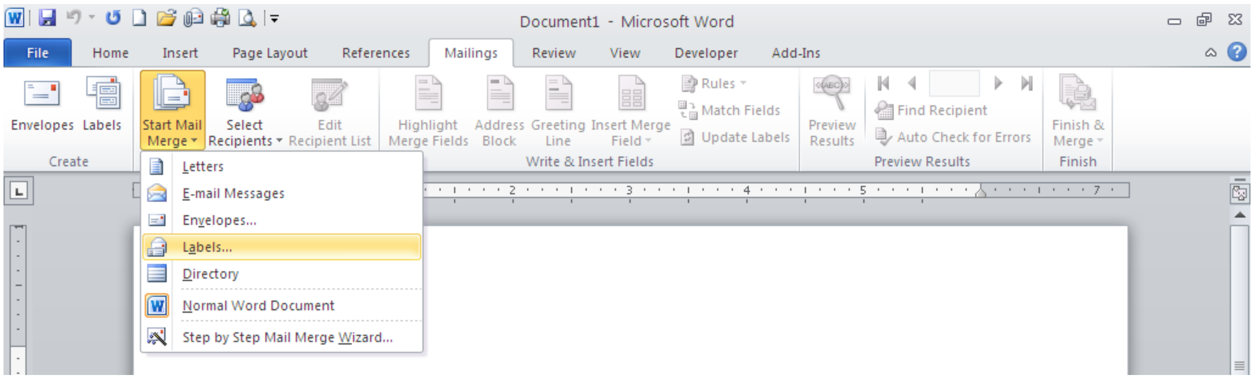
Which method is best ? It quite simply depends on which you are more comfortable with.



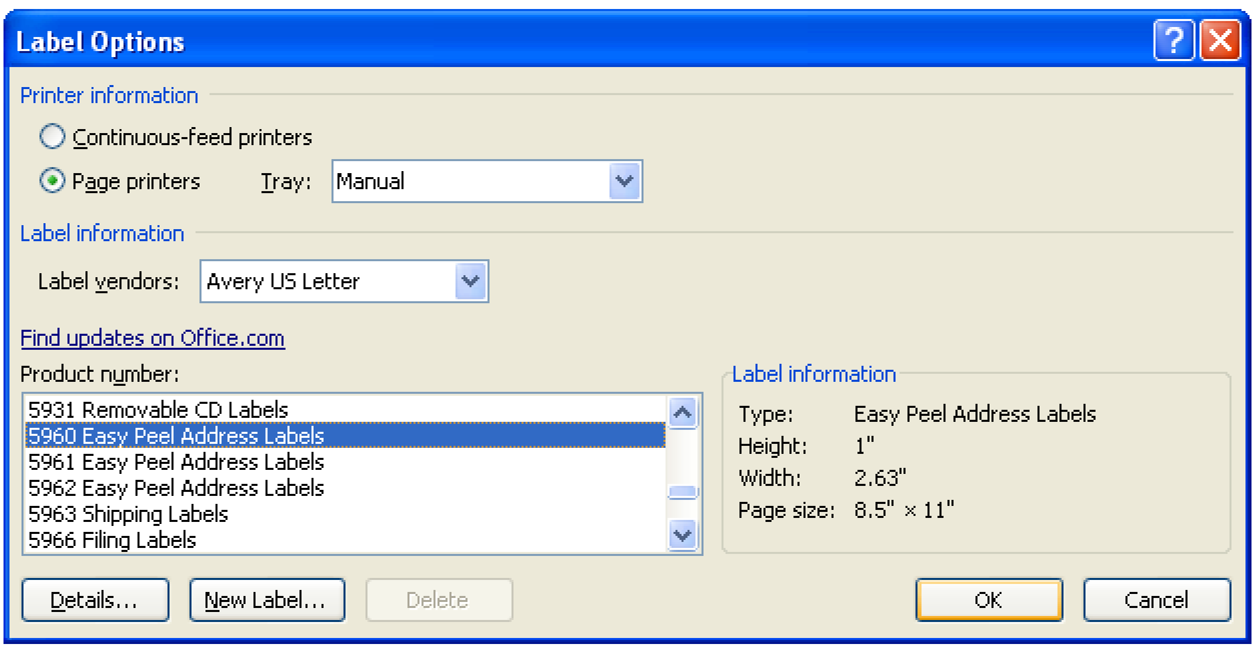
Creating Mailing Labels through Mail Merge.

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.

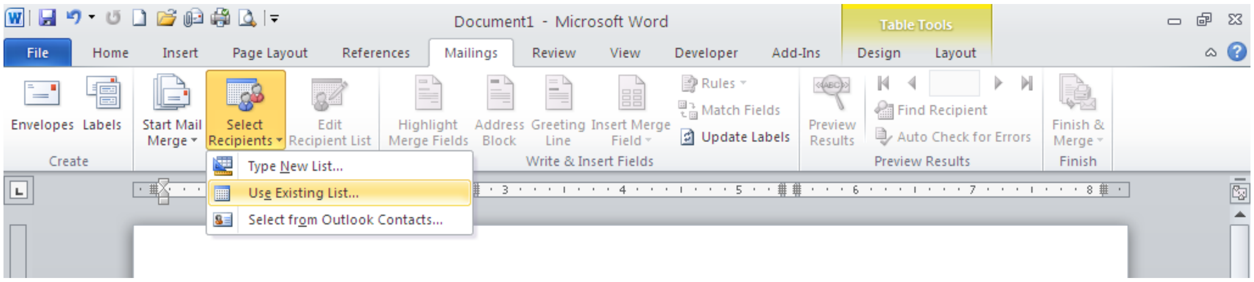


Select the appropriate Label number from the available options. The lower right hand corner shows you the size and dimension of the selected label. Click OK to continue.

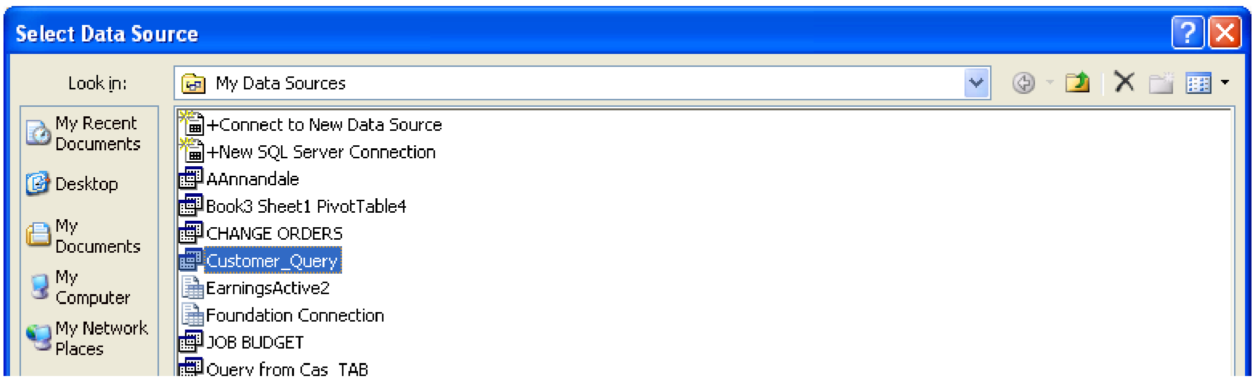


Your document will now be formatted in the selected label format.

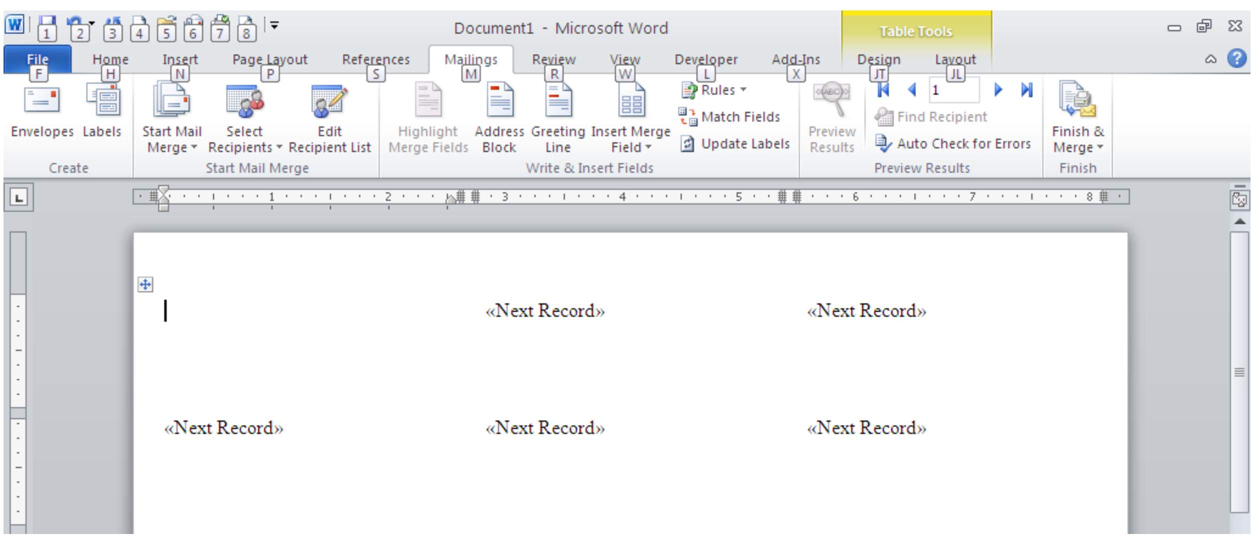
Choose Select recipients – Use Existing List.



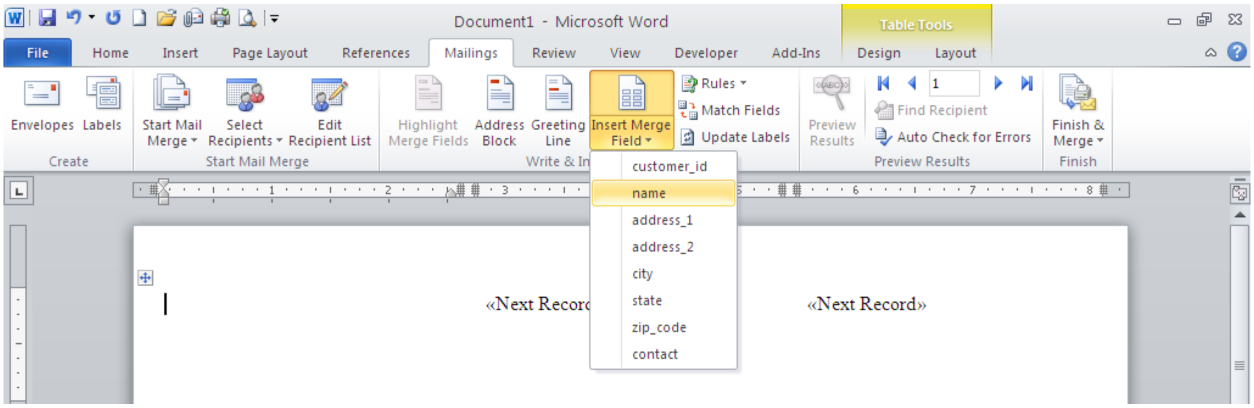
Select the appropriate Data Source and click OPEN in the lower right hand corner. Depending on the Data Source, you may receive a prompt to log into the query and / or you may be asked to Refresh the Query every time the file is opened.



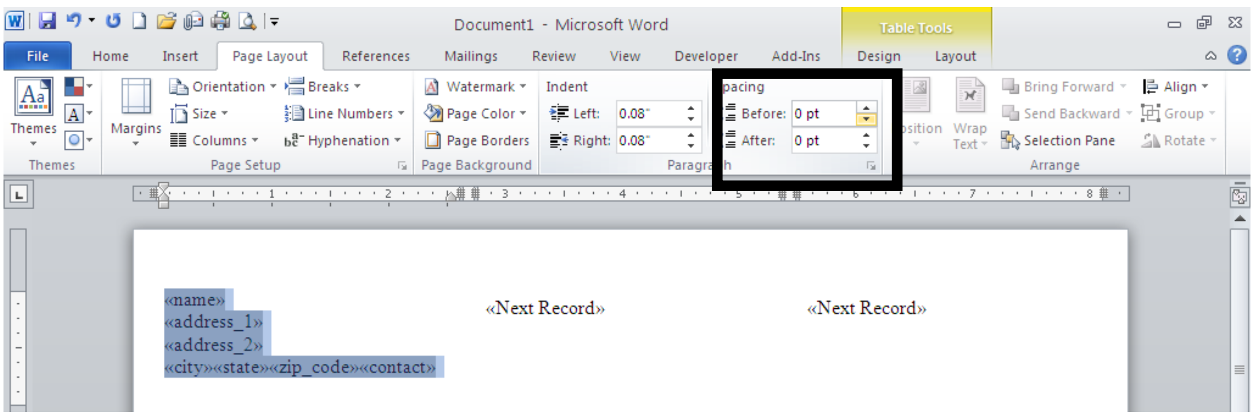
Your documet will now look like the example below:



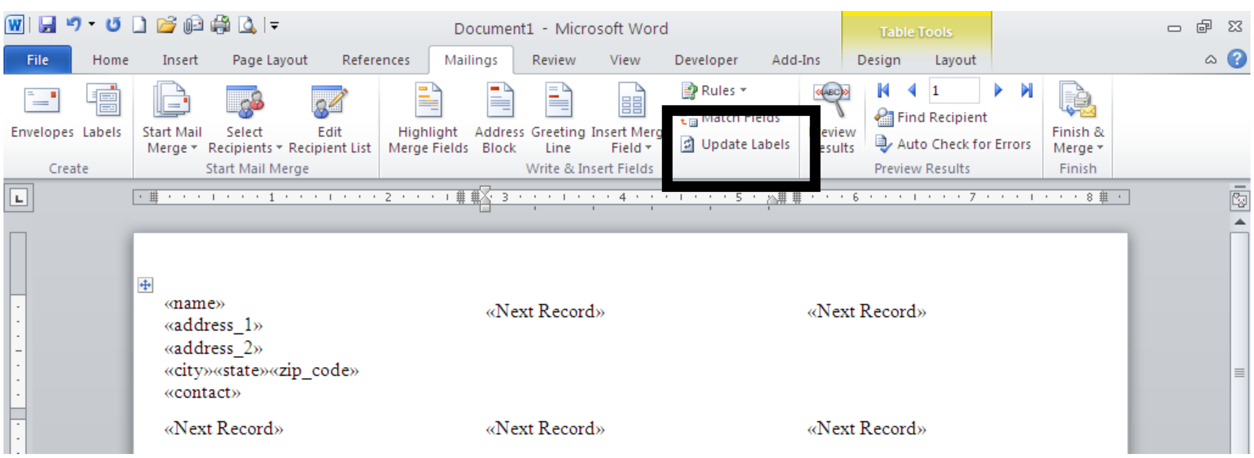
Now it is time to enter the Merge Fields. From the Ribbon, Select Merge Fields.



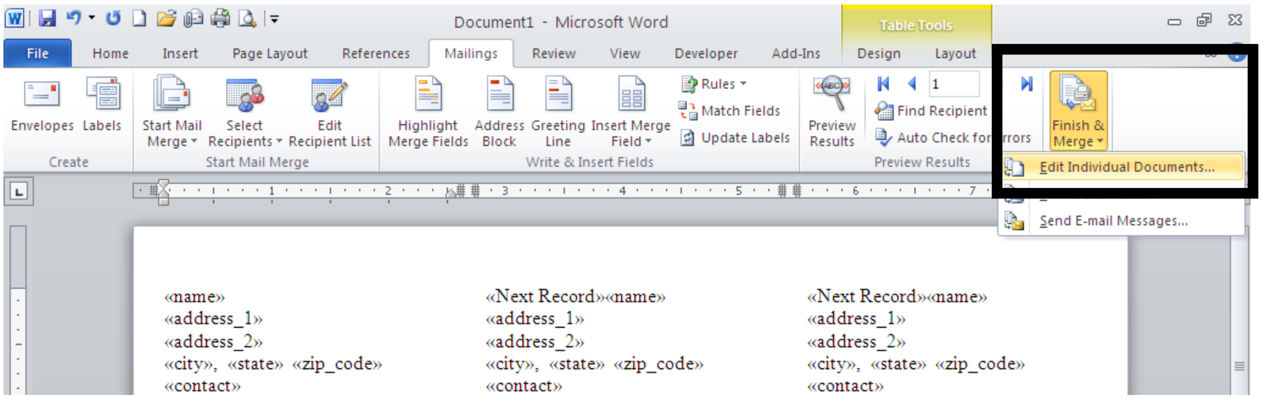
Select the required fields for your document. Note: spacing and font size may need to be adjusted to fit all of the data on the same label.



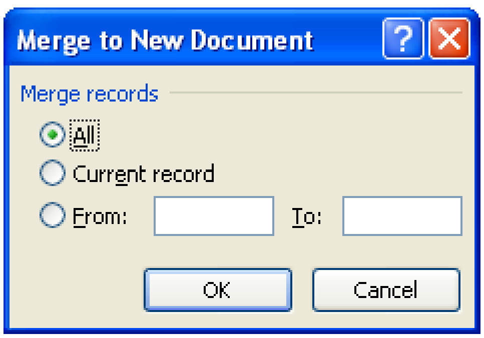
Once the layout is created, Select UPDATE LABELS from the Mailings Ribbon.



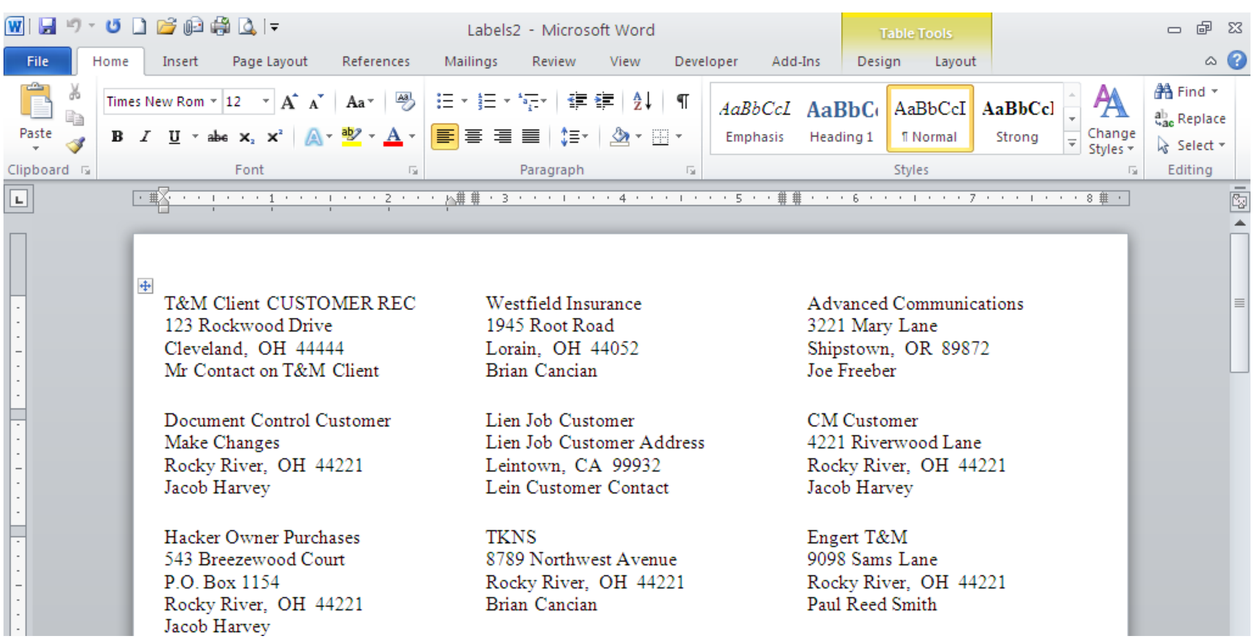
Admittedly, the document doesnot look like much. Select the Finish & Merge option / Edit Individual Documents….



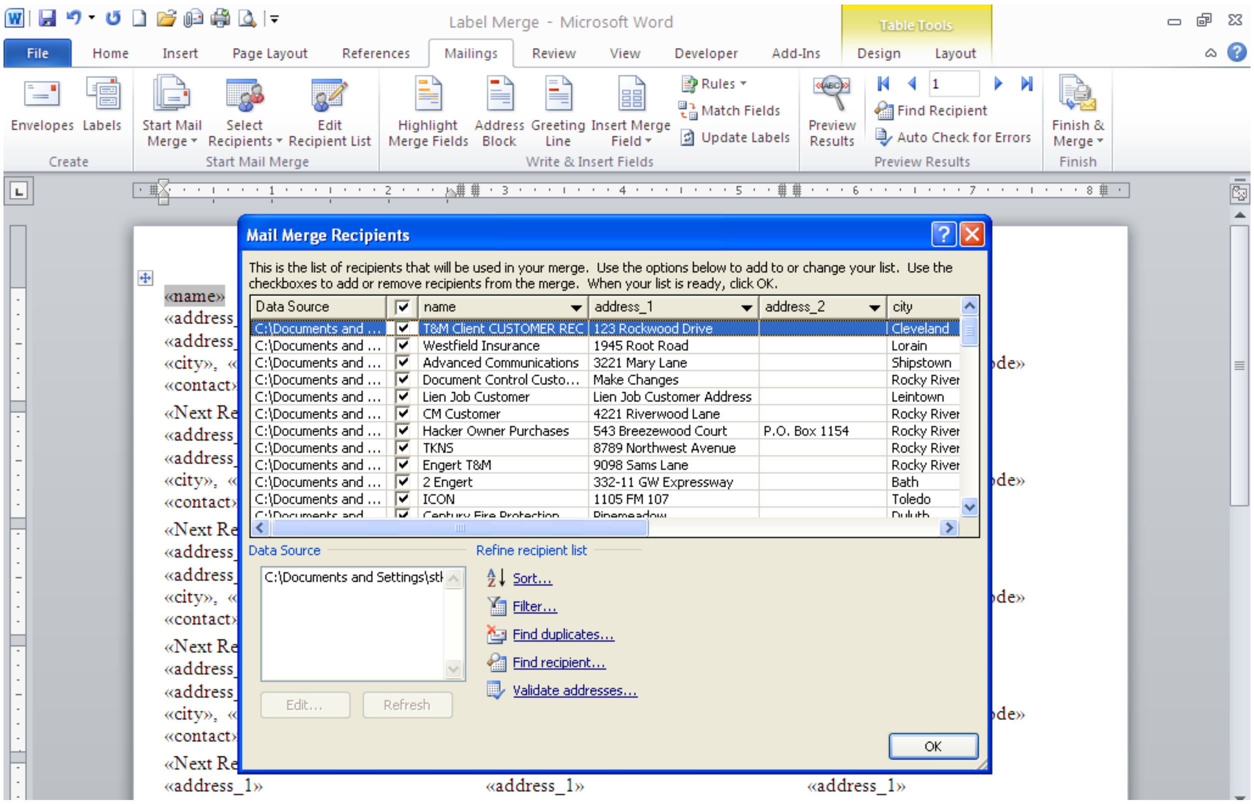
You will be prompted for what range you wish to view – select ALL and click OK



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.



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.