

Microsoft® 2003
Merge Feature
using Excel for a database

Created by
For the Love of Software llc™ ©2004

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INTRODUCTION

Creating a merge document in Microsoft® Word 2003 is done in six simple steps. This document will assist you in following those six steps, deciding what choices to make, and carry you through to completing a merge.

Two documents are required to complete a merge in Microsoft® Word. The **Form Merge Document** and the **Data Merge Document**. The **Form Merge Document** is the document containing the main part of the letter or document to be created. The **Data Merge Document** is the document containing the information that will change for each separate document created by the merge.

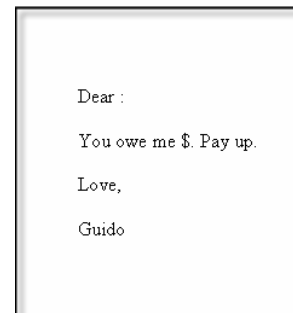
When creating the **Form Merge Document** consider the text that will change for each new document and the text that will not change for each document. As an example, “You are invited to attend the annual Teacher Award Banquet.” This may be the same text used every year. Additionally, the text “The Banquet will be held at” may be the same every year. This is the text that will go into the **Form Merge Document**. However, each year the place, date and time of the banquet may change. The **Data Merge Document** will contain all of the text that will change from one year to the next or from one letter to the next.

Once the merge documents are created, they can be edited just like any other document. When edited and saved, the changes will still be in place the next time the document is opened and used.

By completing each step in this documentation you will successfully complete your first merge.

THE DOCUMENTS

There are two documents used to complete a merge. The first is the **Form Merge Document**; the second is the **Data Merge Document**. The **Form Merge Document** will contain the text that does not change and **field codes** for the text that does change. When creating the **Form Merge Document**, the **field codes** will not be entered until the **Form Merge Document** has been associated with the **Data Merge Document**. Here is an example of a **Form Merge Document** before the **field codes** are inserted.



Dear :
You owe me \$. Pay up.
Love,
Guido

This is not much of a letter (**Form Merge Document**) with missing text and field codes. It requires a date, address, salutation, and dollar amount to be a complete letter.



Here is an example of the same **Form Merge Document** after the **field codes** are inserted.

NOTE: The **field codes** will be different in the document we create. This is set up so you can visualize what we are talking about.

```

«Date»

«First_Name» «Last_Name»
«Street»
«Street1»
«City»,«State» «Zip»

Dear «Salutation»:

You owe me $«Dollar_Amt». Pay up.

Love,

Guido
    
```

Now the letter (**Form Merge Document**) appears more complete, after the merge codes have been inserted. This document is now ready to work with the **Data Merge Document** and complete the task of creating several different letters all at one time.

Below is a sample of a **Data Merge Document** created in Excel. The first row is considered the **field code** row. You can match the fields in the first row with the **field codes** in the **Form Merge Document** above.

	A	B	C	D	E	F	G	H	I	J
1	First Name	Last Name	Street	Street	City	State	Zip	Salutation	Dollar Amt	Date
2	Sandi	Grandberry	1234 Any Street		Phoenix	AZ	85016	Sandi	4,000	April 16, 2004
3	George	Bush	1700 E. Jefferson		Washing	DC	00112	President Bush	5,000,029	April 15, 2004
4										

Here are two letters created from the **Form Merge Document** and **Data Merge Document** shown above. The letter is addressed to two different people owing two different amounts of money.

```

4/16/2004

Sandi Grandberry
1234 Any Street
Phoenix, AZ 85016

Dear Sandi:

You owe me $4000. Pay up.

Love,

Guido
    
```

```

4/15/2004

George Bush
1700 E. Jefferson
Washing, DC 00112

Dear President Bush:

You owe me $5000029. Pay up.

Love,

Guido
    
```

Creating the Form Merge Document

There are two options for creating the **Form Merge Document**. (1) Create it before you begin the process of merging and (2) create it during the **six-step merge process**. This documentation will use the first method.

Preparing for the merge process

Preparatory Step 1.

Enter this text:
Dear ** **:
I am pleased to offer you employment with the school district as a ** at ** High School.

EMPLOYMENT:
Your employment, starting **, ending on **, will constitute ** workdays, which will be based on the school calendar, as defined by your supervisor. Your duties, positions and location of work may be changed based on the needs of the school district.

Preparatory Step 2.

Save the document.

Type the text for the **Form Merge Document** as you would any other document.

Use two asterisks (**) in any space where a **field code** would go. Here is an example:

```

|
|**
|
|** **
|** **
|** ** **
|
|Dear ** **:
|
|I am pleased to offer you employment with the school district. as a ** at ** High School
|
|EMPLOYMENT: Your employment, starting **, ending on **, will constitute ** workdays,
|which will be based on the school calendar, as defined by your supervisor. Your duties, position
|and location of work may be changed based on the needs of the school district.
```

Enter the text so it appears, similar to the sample above.

Save the document as **Employment Form Merge Document**. The first word of the file name should be an identifier such as "Employment". This same word will be used to identify the **Data Merge Document**. This process allows easy identification of the two documents to associate them with each other.



NOTE: The **field codes** will be different in the document we create. This is set up so you can visualize what we are talking about.

Remember, after the document is completed with the asterisks in place, the **field codes** will be inserted during the **six-step merge process**.

Here is an example of how the **Form Merge Document** will look when the ****** have been replaced with **field codes**. (Remember, these codes will be inserted during the **six-step merge process**.)

```

«Date»

«First_Name» «Last_Name»
«StreetAddress»
«StreetAddress2»
«City», «State» «Zip»

Dear «Salutation»:

I am pleased to offer you employment with the school district, as a «Position» at «School» High School.

EMPLOYMENT: Your employment, starting «Date_of_Hire», ending on «End_Date», will constitute «Workdays» workdays, which will be based on the school calendar, as defined by your supervisor. Your duties, position and location of work may be changed based on the needs of the school district.

```

Creating the Data Merge Document

There are several ways to create the **Data Merge Document**. This documentation will use the Excel spreadsheet. Other applications available for use as a **Data Merge Document** are Microsoft® Access, Microsoft® Outlook Contacts, and a Microsoft® Word table.

The Excel **Data Merge Document** should be created prior to starting the **six-step merge process**. When using an Excel spreadsheet for the **Data Merge Document**, individual entries cannot be edited within the **six-step merge process**.¹ However, you can go directly to the Excel **Data Merge Document** you created and edit the data there.

Preparatory Step 3.

Enter the **field codes**:

- FirstName
- LastName
- StreetAddress
- StreetAddress2
- City
- State
- Zip
- Position
- School
- DateofHire
- EndDate
- Workdays

In a new Excel Spreadsheet, type the **field codes** in the first row of the document. Each **field codes** is entered in its own cell along the first row. You may enter as many as you like. When the **Form Merge Document** is set up only the **field codes** required will be entered in it. This means that if you have 20 fields and you only need to use 5 of them in the **Form Merge Document** it is okay. Only the 5 fields needed will be inserted into the **Form Merge Document**.

	A	B	C
1	First Name	Last Name	Street
2	Sandi	Grandberry	1234 Any
3	George	Bush	1700 E. J

¹ This feature is only available if the **Data Merge Document** is created in Microsoft® Access or a Word table.



Preparatory Step 4.

Enter the individual entry information for at least 3 people into the Data Merge Document

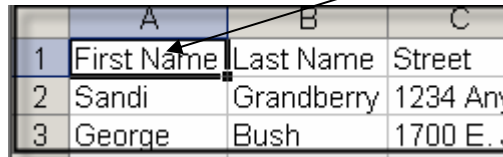
You may either enter the information directly into the Excel spreadsheet or use the Form built into Excel

The three people you enter for this step can be real or made up, along with their information.

Preparatory Step 5.

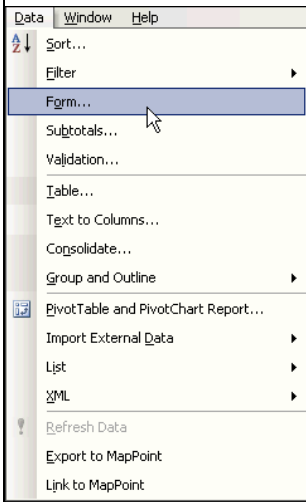
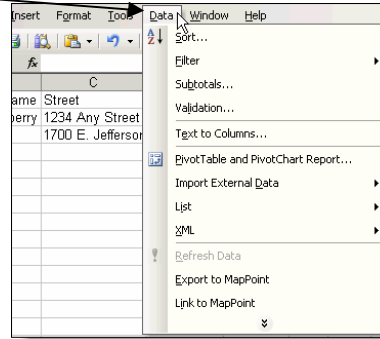
Save the document.

Excel provides a built in form to assist in the creation of the data for the **Data Merge Document**. To access that form, click in one of the cells on the first row.

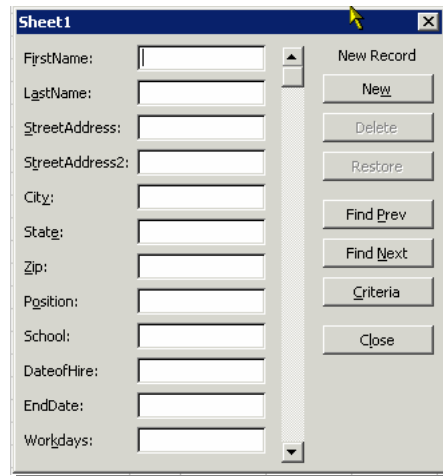


	A	B	C
1	First Name	Last Name	Street
2	Sandi	Grandberry	1234 Any
3	George	Bush	1700 E. J

Click on **Data** on the **Menu Bar**. If necessary click on the double arrow to expand the menu.



Click on form. A form with all the field codes will appear.



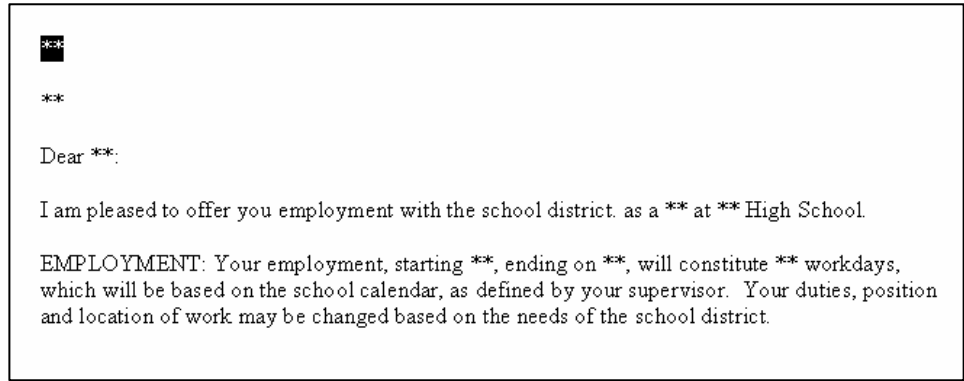
FirstName:	<input type="text"/>	New Record
LastName:	<input type="text"/>	New
StreetAddress:	<input type="text"/>	Delete
StreetAddress2:	<input type="text"/>	Restore
City:	<input type="text"/>	Find Prev
State:	<input type="text"/>	Find Next
Zip:	<input type="text"/>	Criteria
Position:	<input type="text"/>	Close
School:	<input type="text"/>	
DateofHire:	<input type="text"/>	
EndDate:	<input type="text"/>	
Workdays:	<input type="text"/>	

Save the document as **Employment Data Merge Document**. The first word in the name of the document should be the same first word used to identify the **Form Merge Document**. In this case you would use "Employment" Data Merge Document in order to match the **Form Merge Document**.

Preparatory Step 6.

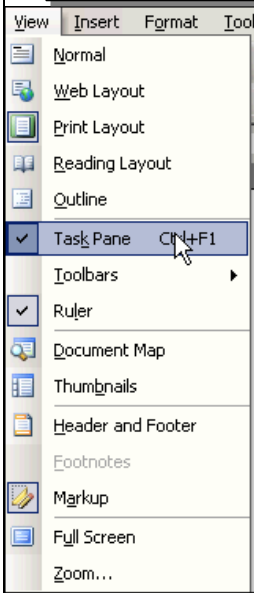
Open the From Merge Document

Open the **Form Merge Document**. It will look similar to this.



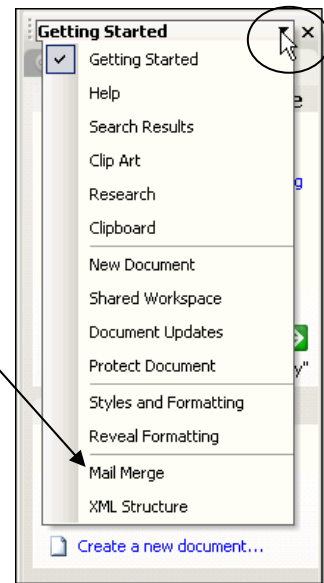
Preparatory Step 7.

Open the Task Pane.



Open the **Task Pane** Click on **View**; Click on **Task Pane**. The Task Pane will open on the right side of your screen.

Click on the **pull down menu** on the Task Pane and select Mail Merge

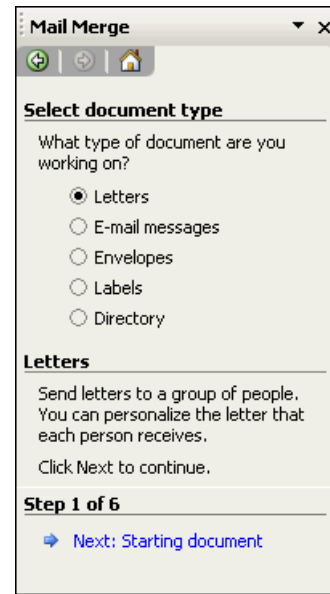


THE SIX STEPS:

Step 1 of 6

Select the type of merge you will be doing

Selecting the document type. On the Task Pane, you decide what kind of merge document you are creating—Letter (which includes any document such as a contract), e-mail messages, envelopes, labels, or a directory. The three most commonly used are letter, envelopes, and labels. This document will use **letter** as the example.

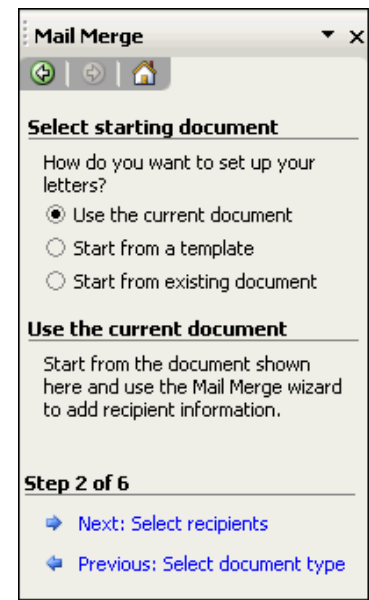


- Click on “Next: Starting document”

Step 2 of 6

Select the document to be used for the From Merge Document

Select the document you will be using for the **Form Merge Document**. There are three choices (1) Use the document you have open on your screen (current document), (2) Use a template to start a new document, or (3) Start from an existing document (this is basically the same as number 1 except you have not yet opened the document. At this point Merge will allow you to find and open the desired **Form Merge Document**). Our document is already open so our choice would be the first one.



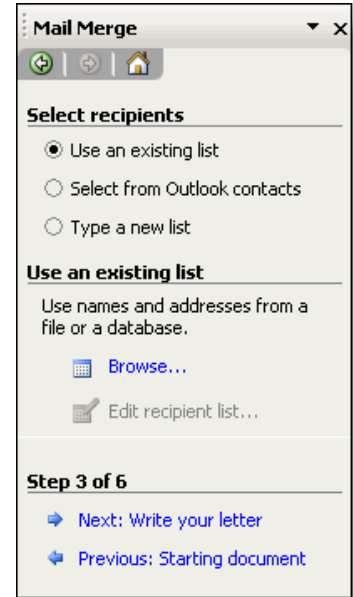
- Click on “Next: Select Recipients.”



Step 3 of 6

Select the **Data Merge Document**

Select the **Data Merge Document** containing the data for your merge. The three options are (1) Use an existing list (such as an Excel database), (2) Select from Outlook contacts (this process is not easy and it requires a lot of patience and practice), (3) Type a new list. This process will automatically use the Microsoft® Access application to store your database. Option 1 will be used for this example.

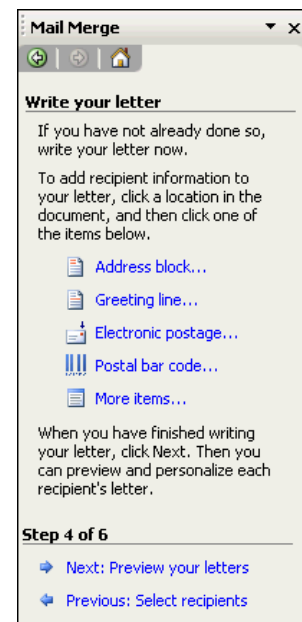


- Click on Browse
- Find the **Data Merge Document** and open it.
- Click on “**Next: Write your letter.**”

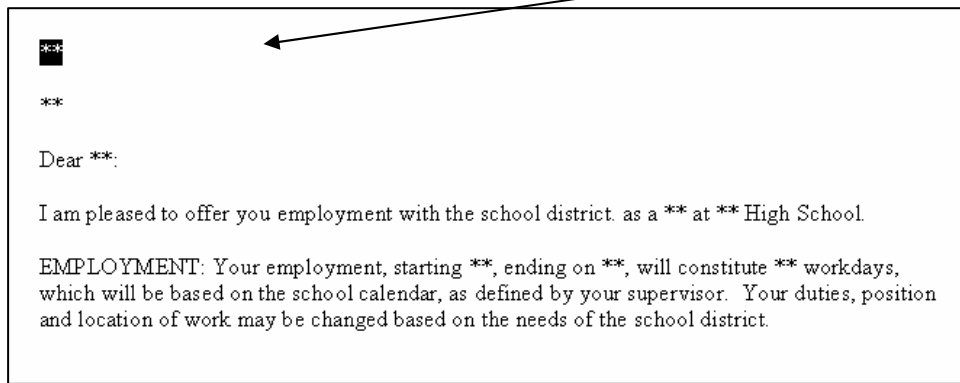
Step 4 of 6

Enter the **field codes** into the **Form Merge Document**

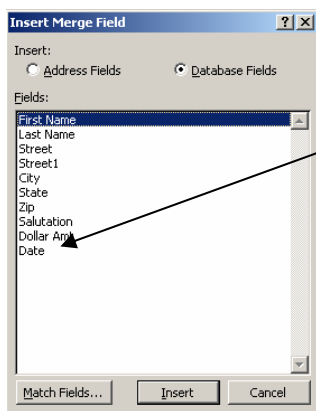
Allows you to enter the **field codes** into the **Form Merge Document**. There are 5 options available for entering the **field codes**. The first 4 are generic as created by Microsoft. In this document, we will use both the **More items** option and some of the generic codes, included in the Six Step Merge process, to enter field codes. This gives you complete control over your document.



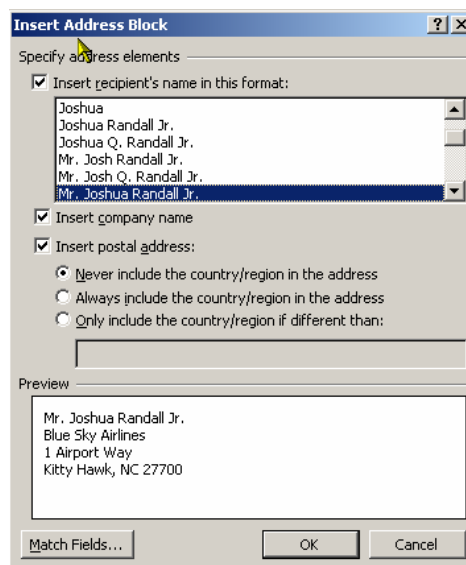
- Select the first set of asterisks in the **Form Merge Document** (**).



- Click on **More items** to insert the date. By using More items you can enter a unique date for each letter. All of the **field codes** used in the **Data Merge Document** are listed here. Select **Date** and click on **Insert**. Then click on **Cancel**. The date **field code** will be entered into the document.



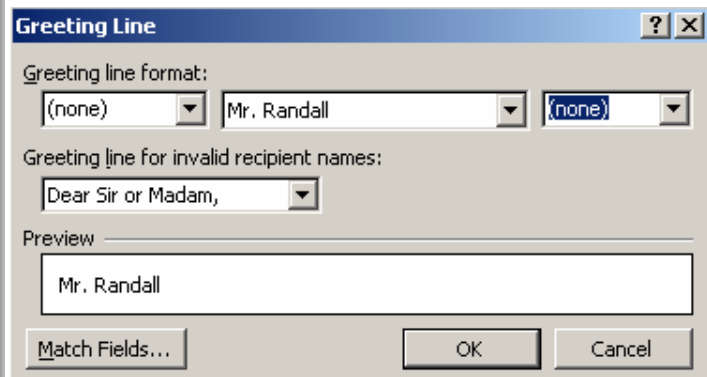
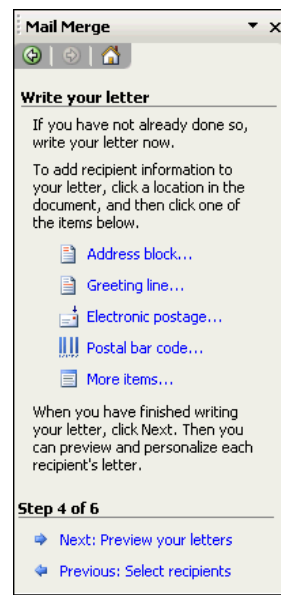
- Next insert the Address block using the built in option. Select all of the asterisks where the address block would go. Click on **Address block**. Select the options until the previewed address block appears as you would like it to appear in the document. Click on **OK**.



The **Form Merge Document** will now look something like this:

«Date»
««AddressBlock»»
Dear **:
I am pleased to offer you employment with the school district. as a ** at ** High School
EMPLOYMENT: Your employment, starting **, ending on **, will constitute ** workdays, which will be based on the school calendar, as defined by your supervisor. Your duties, position and location of work may be changed based on the needs of the school district.

- Now insert the Salutation. Select the asterisks next to Dear and click on **Greeting line** (on the Task Pane). Select the options you want for you document and click on OK.



The greeting of your choice will appear as follows:

«Date»
««AddressBlock»»
Dear ««GreetingLine»»:
I am pleased to offer you employment with the school district. as a ** at ** High School
EMPLOYMENT: Your employment, starting **, ending on **, will constitute ** workdays, which will be based on the school calendar, as defined by your supervisor. Your duties, position and location of work may be changed based on the needs of the school district.

Using the **More items** option, select the remaining asterisks in the letter, one at a time, and insert the proper code from the list. After each insertion, click on Insert and then Close. When all codes have been entered the document will look something like this:

«Date»

««AddressBlock»»

Dear ««GreetingLine»»:

I am pleased to offer you employment with the school district, as a «Position» at «School» High School.

EMPLOYMENT: Your employment, starting «Date_of_Hire», ending on «End_Date», will constitute «Workdays» workdays, which will be based on the school calendar, as defined by your supervisor. Your duties, position and location of work may be changed based on the needs of the school district.

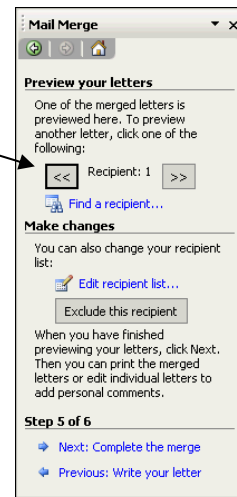
Step 5 of 6

Preview your merged documents

- On the Task Pane, click on **Next: Preview your letter**

This step allows you to see if the documents have merged properly without actually completing the merge. Click through the merged documents using the left and right arrows on the Task Pane.

- **Find a recipient** allows you to actually search for one of the letters by the recipient's name.
- **Edit recipient list** will allow you to pick and choose who will be included in the merge by placing a checkmark next to the name to include or remove the checkmark next to any name not to be included.
- A second option is to simply scroll through the letters created and click on **Exclude this recipient** for each person you do not want to include.
- Click on **Next: Complete the merge** in the Task Pane.

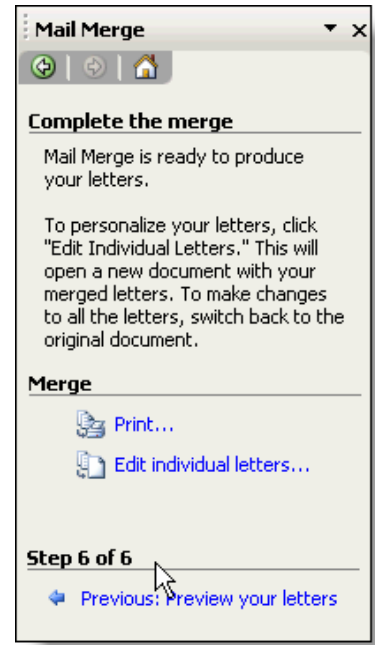


Step 6 of 6

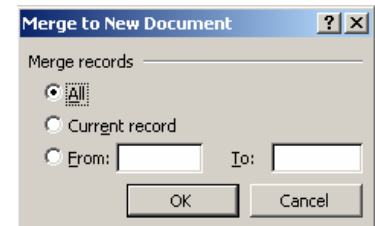
Finish the merge and print the documents.

NOTE: If printing documents at this point, you must use the **Print** option in this pane. If you use the print icon or the File/print command you will only print the document showing on your screen.

Now that the merge is completed a new file has been created that contains all of the individual documents. If 50 names were included in the database, your document will have 50 individual letters or documents created, however, only one document will show on the screen at a time.



To Edit individual letters, click on **Edit individual letters** and then select **All** (or the option you want) and click **OK**

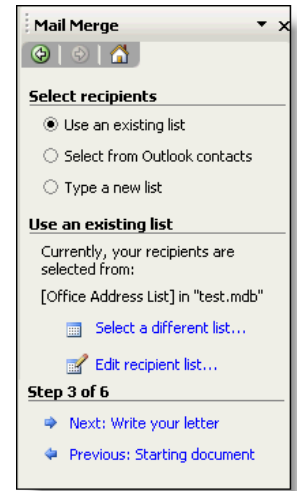


If you have clicked on **Edit individual letters**, you are working with a document outside of the Mail Merge process. You can edit each document individually and you can print it as you would any document using the print icon or the File/Print command.



CHANGING DATABASES

If the information needed for the **Data Merge Document** changes and a new Excel spreadsheet is to be used, when you get to step 3 of 6 click on **Select a different list**. Navigate to the location of the list to use and click on open.



Complete the merge as with the other **Data Merge Document** finishing steps 4, 5, and 6.

NOTE: Microsoft® Word 2003 has a safety feature built in to protect you from unwanted viruses. When you open an existing **Form Merge Document** you will get a message that looks like an error message. It is not. It is asking if you want the **Data Merge Document** original attached to the **Form Merge Document** to be attached again or if you want to attach a new **Data Merge Document**. If you are using the original **Data Merge Document** click on “yes” if you want to use a different **Data Merge Document** click on “no.”