

Using Microsoft Word Mail Merge

Creating a Database Using Word 20XX

- **Word can only use a Word document with a single table** for a data source.
- Word's table insertion operates very similar to Excel.
- Note that Word 20XX has a Table Design tab once you insert the table.
- Create that database as follows:
 1. First consider how many "fields" you want (Last Name, First Name Address, etc.) we will discuss the same with Excel.
 - a. Consider adding fields by which you can later Filter (Edit during Mail Merge)
 2. Start a new Word Document.
 3. Insert a table (Insert ribbon, Table button), with the corresponding number or columns (for Fields) and 5 or 6 rows (for Records).
 4. Begin inserting data.
 - a. **Make the first row the named fields (such as First, Last, Address, etc.)**
 - b. Tab key moves to the right between cells, similar to Excel.
 - Tab from the last cell of a row moves to the next row.
 - **Tab from the last cell of a final row inserts a new next row.**
 - Enter key does not move to next cell down, see below.
 - c. **Shift-Tab moves from cell to next cell left**, or previous row if in the last cell.
 - d. Unlike Excel, **the ENTER key creates a new line within the cell**, it does not move to the next cell down. Thus SHIFT-ENTER has no function.
 - e. Like Excel, if you return to a cell, you will notice its contents is selected. Typing will replace the data in that cell unless you deselect the existing text first.
 - f. Use the Table tools ribbons (Design and Format to size or "AutoFit" columns).
 - Remember to have cursor within table for Table tools ribbons to appear
 - Distribute Columns button (on table Layout ribbon just right of cell size button) resizes selected columns to share size equally. Same with Distribute rows button.
 - If you cannot see certain buttons, the window is too small (some items are hidden, or condensed under its "Group name").
 5. Sort data by using Table Tools Layout Ribbon, Data drop-down far right, and/or Sort button.
 - a. Choose which column or columns to sort by.
 - b. Indicate if it has a header (otherwise Sort function sorts header alphabetically with other rows).
 6. **Word 20XX, insert additional rows or columns by right-clicking within a cell** and choosing Insert row above or below, or column to the right or left. Or again, **using Tab in the last cell of the final row** inserts a new row.
 7. Once your data has all been added, save the document to a folder (or create a new folder). Remember the folder, and its location.
 - a. **Hint:** Don't wait until completed to save for the first time. Save repeatedly as you enter data...to avoid inadvertent loss (power or human).
 - b. **Hint Again:** Word 2003 and earlier looks first for databases within the folder labeled "My Data Sources". Consider saving databases in that folder.



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Printing your database

- Gridlines are immediately present by default as soon as you insert a Table.
- Remove unwanted gridlines by using the Table Tools Design ribbon and the Borders drop-down menu.
 - First select the entire table, or the cells you wish to change gridlines within.
 - Then on the Table Design ribbon Borders drop-down, choose **No Borders**.

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Creating a Database Using Excel 20XX

1. Open Excel to a blank spreadsheet.
2. Begin inserting data.
 - a. **Make the first row the named fields (such as First, Last, Address, etc.)**
 - b. **Tab key moves to the right one cell at a time.**
 - c. **Shift-Tab moves to the left one cell at a time.**
 - d. **The Enter key moves to the next cell down (below).**
 - e. **Shift-Enter moves to the cell directly above.**
 - f. **Double-clicking at the separator between columns automatically resizes the columns to fit data.**
 - Or use the Home ribbon's Format button (at the right) "Autofit...".
3. Sort data by going to the **Data ribbon** and choosing **Sort** (third group from left).
 - a. Choose which field or fields to sort by.
 - Be within a cell (in that field) with data.
 - Also **note that if you have empty rows, the sort will stop at an empty cell.**
 - To sort across empty rows, select all rows wished to sorted, and select Custom Sort from the Sort drop-down.
 - b. Remember during a custom sort, to click **My data has headers**. Failing to do so may result in the header being resorted alphabetically as well.
4. **Filter data (to exclude records) if using a master database** (and created fields for filtering).
 - a. Note a **small chevron appears on every column** of first record to allow choosing the field (column) to filter by.
 - b. You will then be given opportunity to pick "value".
5. Insert columns by right-clicking on a column letter (top) and choosing Insert Column
 - a. Right-clicking inside a cell in Excel 2007 through 2013 gives Insert as a command. Choosing it opens a small dialog box asking to shift cells, or insert an entire row or column.
 - b. In both cases the new column is inserted in front of (precedes) the column on which you right-clicked.
6. Insert new rows by right-clicking on a specific row number (far left) and choosing Insert Row. Or by right-clicking inside a cell as mentioned above.
 - a. The new row (by either method) is inserted just above the row (or cell) onto which you right-clicked.
7. Once you have completed the data entry, save the document; remember where!
 - a. **Hint Again:** Don't wait until the database is completed to save for the first time. Save repeatedly as you enter data...to avoid loss with power outage or human error.
 - b. **Reminder:** Word looks first for databases for Mail Merge within the folder labeled "My Data Sources". Think about saving databases in that folder.

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Things to remember about Excel

- Remember the **Format as table** button on the Home ribbon, if you wish to color alternate rows, or apply other available formatting.
 - Select all involved cells first!
 - Also designate if with headers.
- Remember to format cells or columns containing numbers starting with zeros (such as Eastern Zip codes) as **Special** , and then Zip Code.
 - Or Zip code + 4 **ONLY** if you have the additional 4 number code for all.
 - Otherwise it uses the last four numbers of the six number code for the + 4.
- **When you select a cell which already contains data, typing REPLACES the entire contents**
 - To only modify an entry (add or subtract characters), **use the Function bar** at the top.
- **Right-clicking in any cell displays a Format Cell command** which opens the formatting box for controlling shading, borders, alignment, wrapping text, and designating the number format.
- Also, some newly available formatting (increase or decrease indent as example) only works by saving in the newer **xlsx** format.
- Printing an Excel spreadsheet (database)
 - Print with gridlines, use the Page Layout ribbon and in Sheet options group, Find Gridlines and place the check in Print.
 - A check only in Gridlines merely lets you see them while entering data, not printing.
 - To print only select gridlines, use the Home Ribbon, borders drop-down button (right of **BU**), or the Font Expansion handle, and dialog box.

Using Microsoft Word Mail Merge

Using Mail Merge in Word 20XX

- We will use labels as the example, but choosing letter or envelope works the same (**except for skipping the Update labels step**).
 - Remember choosing Email messages only works if you are also using MS Outlook as your mail program.
1. Click on Mailings tab. The Mailings ribbon appears.
 2. Click on “Start Mail Merge” button and choose the task (letters, envelopes, or labels). If you choose labels, a window opens to choose the label’s number.
 3. Once you have chosen a label, click OK and the document opens with blank page of labels.
 4. Next click “Select Recipients” to open a database, and choose “**Use existing list**”.
 - Navigate to the Saved database.
 - If Excel, it will ask which sheet.
 - If sheets are not named, choose sheet 1.
 - **Or Word offers you to type a new list (create the database)**
 - And once done adding data, has you save the new database before continuing.
 - When have chosen the database, the sheet of blank labels transforms, displaying a blank label and “Next Record” on each of the other labels.
 - **Only Word 2007 will recognize and use Microsoft Works databases.**
 - So it is time to switch if still using Microsoft Works.
 - Word 2010 and 2013 no longer recognize Works databases, so must use Works and **Save As CSV** (comma separated value) file, then open with Excel and save as an Excel file.
 - **Remember** to have first record of the Works database repeat the field names, even though the Works column headings also display them, because the Works column headings are lost when saved as a Comma Separated Value (csv).
 - If you no longer have Works, try the Works database conversion tool
<http://www.codealchemists.com/worksdatabaseconverter/>
 - May not be perfect, particular if more than one table was in Works file.
 5. Click “Edit Recipient List” to select or deselect names in the list.
 - You can also sort and filter recipients if so desired.
 6. Click on “Insert Merge Field”, and select a field to insert. Word 20XX allows you to insert a field either the old way (by clicking the button),
 - a. Or the new way by clicking the drop-down arrow at the bottom right of the Insert Merge Field button. This allows adding punctuation or formatting, and then adding another field as you go along (unlike earlier versions).
 7. Clicking on “Update Labels” will perform the old equivalent of “Propagate” labels. The pattern of the labels is now copied to all labels, replacing "Next record" with formatted Field names showing, referring to the next record in the database.
 8. "Next click on “Preview Results” button to view the labels’ appearance (**you only get a preview of the first page**).
 - a. **Saving this document at this point** saves the label format with the current database association, **meaning it is linked to the file location** on your computer of (path to) your database. To **successfully** print the labels, you **must have the database forever in its original location** (where you selected from at the start).
 - b. **The advantage** of saving this to file at this point, if you later wish to update any information in the database, re-opening the file, allows the labels to **reflect** those changes.

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9. The final step is critical.
 - This step makes all the entries available.
 - **Up until now, only one entry ever appears.**
 - Click the “**Finish the Merge**” button and choose:
 - a. If all you want to do is print your labels or documents immediately, choose “**Print**”.
 - This will open a dialog box asking which records you wish to print.
 - Choose “All” to send all the labels directly to the printer. Or select the range you desire to print.
 - This is fine since you are using your own computer, with the database file present, and location unchanged; so they print.
 - This is the most common scenario.
 - b. Should you wish to take your documents to a printer in a different location, or modify certain labels, (**Or just preview the all pages of labels before printing**), choose “**Edit individual labels**”.
 - This opens a new window (a **new** document) covering up (laying on top of) the original one, not replacing it.
 - This new document contains all the labels (or letters, or envelopes) **including** all the actual label data.
 - Remember, the original document contains no actual data; it only “links to (uses)” the data file.
 - i. Saving this **new document** saves the current data with the label; it is fixed in time (**changing the database no longer updates the label information**).
 - Thus give it a name perhaps with a date.
 - You do not need to save this if you just wanted to preview.
 - ii. This saved file is available for printing anytime and anywhere without requiring the database **file** also be available.
 - iii. But **remember**, if the database is subsequently updated, these labels remain unchanged (unaffected).
 - However, you may change an item on these labels without affecting your original database file before printing.
 - Note, when you close this window (document), the original Mail merge **linked** to the database is still there. Don’t be confused.

Using Microsoft Word Mail Merge

Adding Graphics to labels or envelopes in Microsoft Word

- Adding graphics to a Mail merge label or envelope is the same as adding a graphic to any Word document
 - Always work on the first label. Otherwise they will not update the correctly.
 - If you add the graphic after the initial “Update labels”, or change pictures or arrangement (**always in the first label**), click on the Update labels again to change all labels on the page.
 - Use the Insert ribbon and choose Pictures (to insert one of your own), Clip-Art or Online Pictures (2013), or other graphic choice (such as Shapes).
 - Search for the desired file (if picture, within your own computer).
 - You need to Format the picture Text Wrapping (Picture Tools ribbon) as something other than “in line with text” in order to position it to your satisfaction (**consider even "behind text"**).
 - To select **covered graphic**, Home/Editing group (right)/Select/Object)
 - Should you wish to add different graphics to certain labels, choose “**Edit individual labels**” first, and then add or change the graphic for each.
- Adding graphics to individual labels or envelopes (not a mail merge) is also easy, but somewhat hidden.
 - First go to the **Mailings ribbon** and choose **Envelope or Label**.
 - Choose the options for envelope (size, etc.) or Label type.
 - The trick is to click **Add to Document** (for Envelope) or **New Document** (for labels).
 - Now add your graphic as desired to the label or envelope, with all the same editing possibilities.
 - Remember, for alignment you need to Format text wrapping!
- Hints for positioning graphics.
 - Sometimes positioning using the mouse is imprecise.
 - Fine tune position by using the arrow keys on the keyboard.
 - Experiment with Text Wrapping choices for effect and appearance.
 - If still having alignment difficulties (address block is distorted), consider using tables even in labels.
 - You will want to remove borders.
 - Right-click on the four-directions square at the far left upper corner of the table and choose Borders and Shading, the click on the None button.
- If creating a sheet of the same label wanting a graphic (such as Return address labels), since no “update labels”, add the text prior to clicking on the New Document button, then add graphic and then Copy and Paste to each label.