

The graphic features a large, stylized blue 'W' on the left, partially overlapping a light blue 'V'. To the right, the word 'WORD' is written in a blue, italicized serif font. Below this, the words 'Training' and 'Series' are stacked in a black, serif font. The entire graphic is set against a background of a grid of thin, light blue lines that recede into the distance, creating a 3D effect.

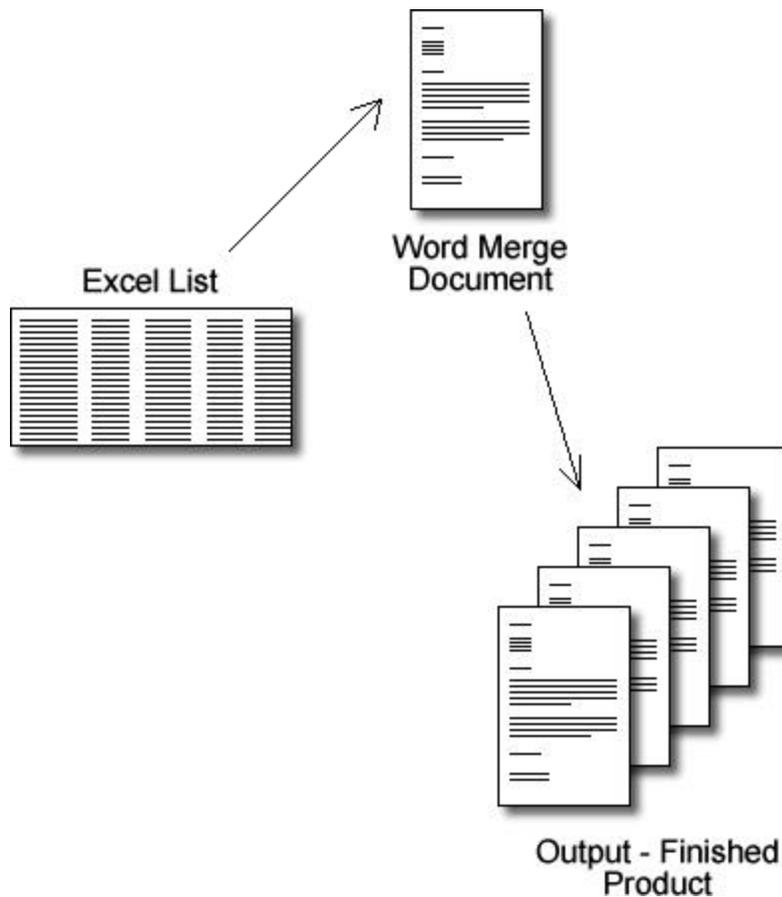
WORD
Training
Series

Setting up a Merge Document

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This paper focuses on setting up a merge document using Word and Excel (having already created the list in Excel), specifically a mail merge form letter. We'll be designing a business letter for our mail merge. The software I use is Word and Excel 2000. The XP versions of these programs is slightly different (a paper on these versions will be out shortly).

An overview...



Setting up a merge consists of three components: the list information (names and addresses, for example), the merge document with the codes (codes that point to the list information) and the resultant documents, the product of our merge.

For the list, you have to edit it at some point, either entering the names and addresses or importing the information from another system.

For the merge document, you have to edit this as well. You have to type your letter (or labels, etc.) and enter the merge field information so Word knows where you want the name and address information to appear within your letters.

For the output, our finished product, this is the piece of the process that you do not edit. If you've created your list correctly (free of typos, etc.) and you've created your form letter correctly (again, free of errors), then there should be no edits required on the finished product, our merged results.

Let's set up our first merge.

Close all of your other programs you have running and then start Microsoft Word.

Word should give you a new document to begin with. If not, click on the File menu and choose New. A dialog box will open. Choose Blank Document.

Set your page margins (File > Page Setup) and any other formatting items before beginning. After that's complete, click on the Tools menu, choose Mail Merge and a dialog box will appear (Figure 1).

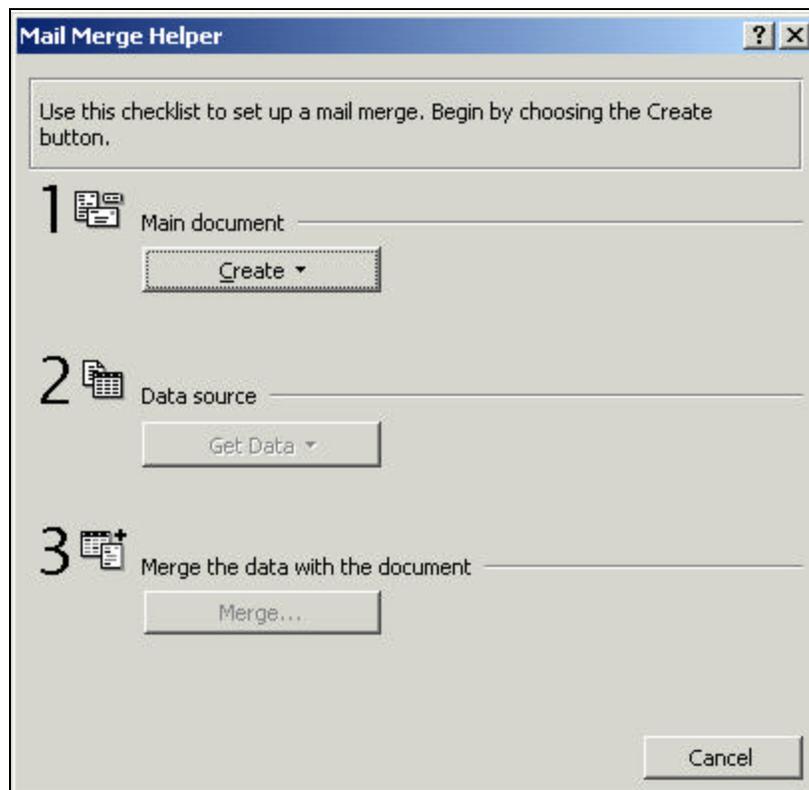


Figure 1

Click on the Create button and choose Form Letters. A window (Figure 2) will open above this one, choose the Active Window option to work with the blank document you have opened in Word.

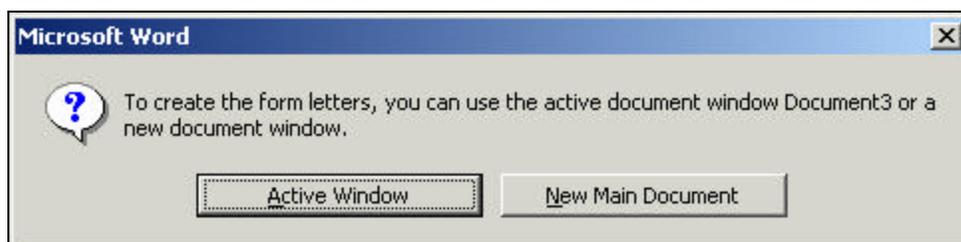


Figure 2

Click on the Get Data button and choose Open Data Source (Figure 3). A dialog box will appear where you can navigate to the folder where your Excel file is located. Once you find it, highlight it and click on the Open button.

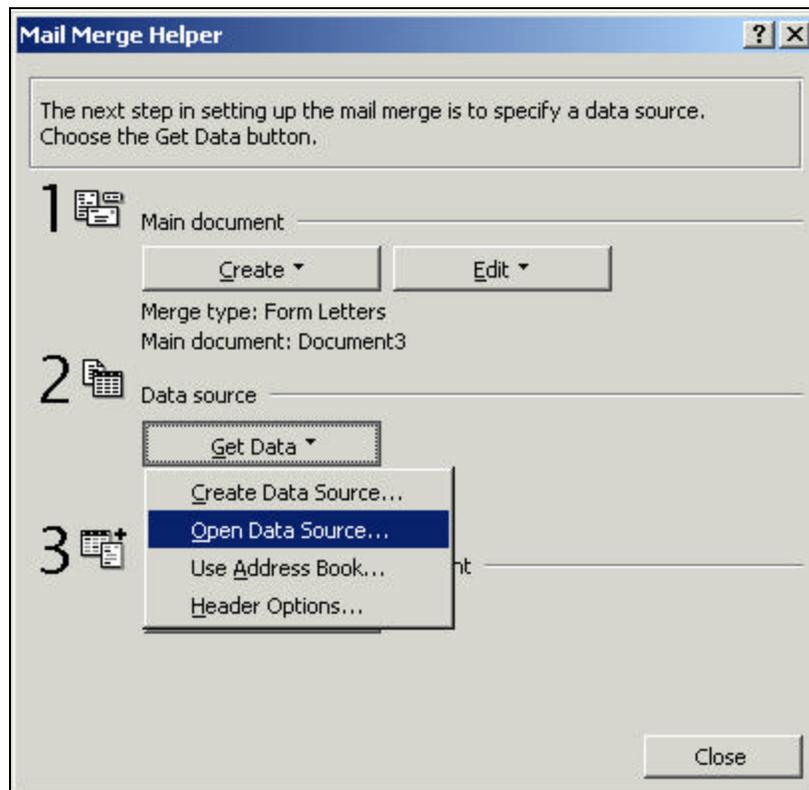


Figure 3

A small window will appear (Figure 4). Depending on how you set up your list in Excel (if you have multiple worksheets), your window may appear differently. Click the OK button to use the Entire Spreadsheet.

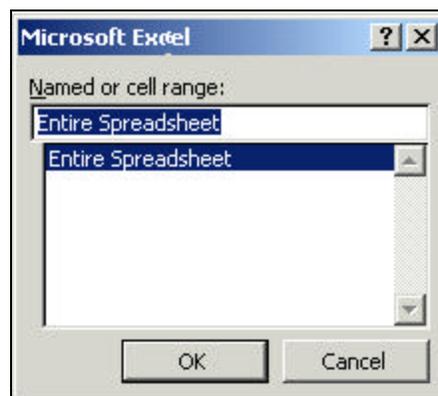


Figure 4

The next window (Figure 5) is a typical message because you are starting with a blank document. Click the Edit Main Document to start creating your business letter.

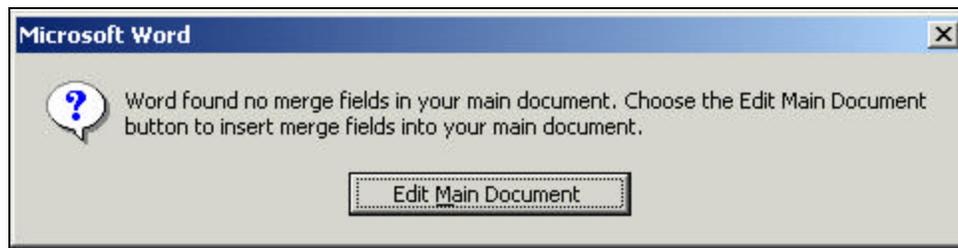


Figure 5

You should now find yourself back in your new document. You should also notice a new toolbar (Figure 6) displayed somewhere within Word (typically near the top).



Figure 6

Start composing your letter.

When you get to the point where the person's name and address is to appear, that's when you want to click on the Insert Merge Field button on the Merge Toolbar (Figure 6).

The button will expand, much like a menu, to display a list of available fields from within your Excel list (Figure 7). If when you created your list in Excel you didn't use column labels (like Title, FirstName, etc.), you will actually see the name and address of the first person within your list. Don't worry, the merge document will merge correctly, and not create one or more letters for that individual listed. Word simply displays the first record (row) of information.

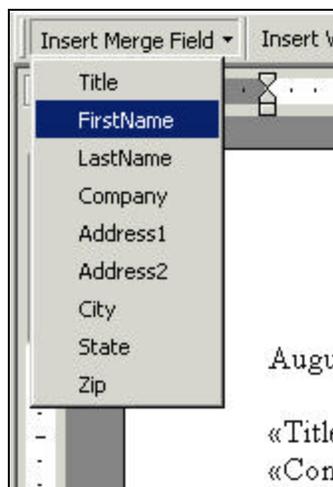


Figure 7

Each time you want to insert a field, click on the Insert Merge Field button and select the appropriate item. Keep doing this until everything is laid out the way you want it to be (see Figure 8 for an example).

If you've supplied a Title column in your list, and you've split each person's name into first name, last name, you have two choices when addressing the person: Dear <<FirstName>> or Dear <<Title>> <<LastName>>.

August 30, 2003

«Title» «FirstName» «LastName»
«Company»
«Address1»
«Address2»
«City», «State» «Zip»

Dear «Title» «LastName»:

This letter is to inform you of our recent changes in our product line. And because you.....

Figure 8

Basically, wherever you want a person's information to appear within your document, simply insert the appropriate merge field.

Once you have your document all laid out, you can now conduct your merge.

When you actually do your merge, I recommend that you merge to a new document (Figure 9). Review the merged results and, if all is fine, then send it to print.

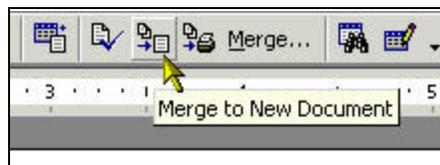


Figure 9

After you have printed your letters, you can choose to save the merged results (all letters that you merged will consist of a single file) or just discard it.

For the merge document, you might want to save it if you are going to run the merge again in the future. Even if you run the merge for different names and address, the merge document itself won't change (the Excel list will change).

That's all there is to setting up a merge document, at least a form letter. Setting up other types of merge documents are very similar to this. Try your hand at each, and you'll discover how easy the whole process of merging really is.

Good luck!

A handwritten signature in blue ink, appearing to be 'Steve'.