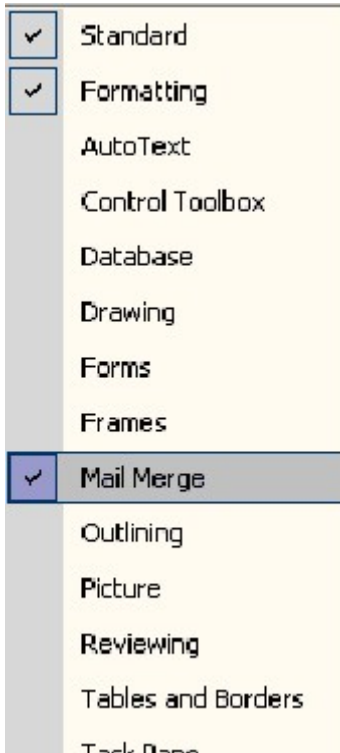


## Merging Excel Data Sources with a Word Document

### Part 2: Setting up the Main Document

For the main document, you can use either a new, blank document, or a document you've already created.

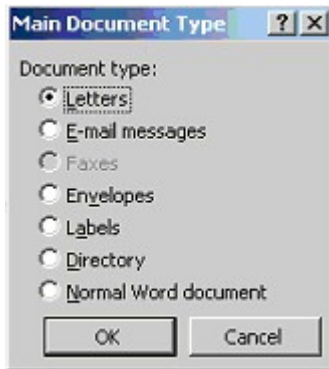
With the document open, activate the **Mail Merge toolbar** by right-clicking on the gray space around the toolbars and selecting **Mail Merge** from the pop-up list:



On the **Mail Merge toolbar**, click the **Main document setup** button.



In the **Main Document Type** dialog box, select the type of document you wish to create. For this tutorial, select **Letters**. Then click **OK**:

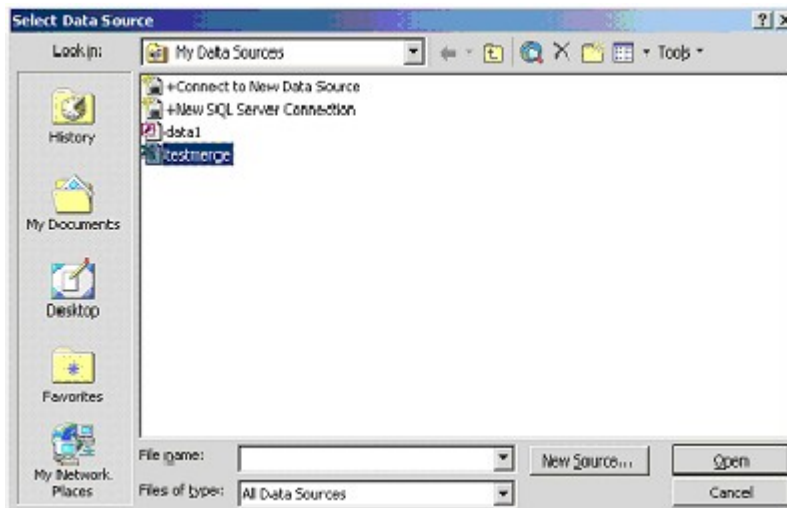


Once you have created the main document, it is time to associate your data source with the document.

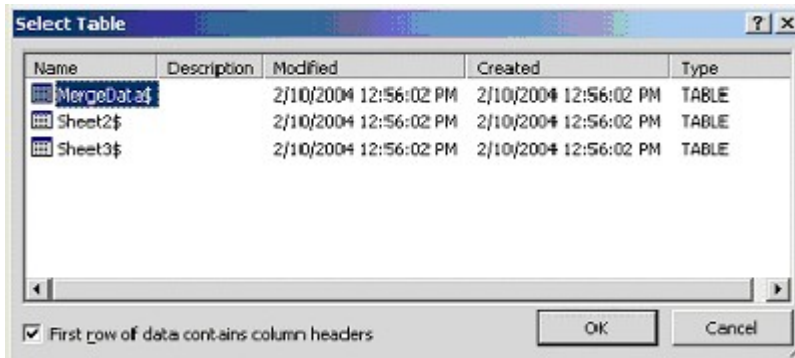
On the **Mail Merge toolbar**, click the **Open Data Source** button



When the **Select Data Source** dialog box appears, navigate through the folders until you find your Excel workbook. If you are unable to find your Excel file, make sure you have selected **All data sources** in the drop down box beside the **Files of type:** label. When you find your file, open it by double-clicking on it, or by selecting it and then clicking **Open**.



In the **Select Table** dialog box, select the sheet that contains the data you wish to merge with your document. Before you click **OK**, make sure the box beside **First row of data contains column headers** is checked.



Now that the data source has been associated with the main document, you can begin entering text and/or editing your document. You cannot, however, make changes to your data source in Excel; if you need to make changes to the data, you must close the main document in Word before you can open the data source in Excel.

Inserting merge fields into your document is easy:

Click the **Insert Merge Field** button on the mail merge toolbar



The **Insert Merge Field** dialog box will appear



Highlight the name of the field you wish to insert from the list and click **Insert**. The

box will stay open, allowing you to insert more fields. When you are done, click **Close**. If you insert more than one field in succession, Word will not automatically add space between the fields in your document; you must do this yourself after you close the dialog box. In your document you will see the field name surrounded by double arrows.

Microsoft recently added a mail merge feature that allows you to insert address blocks and greeting lines. By clicking the respective button on the toolbar, Word will allow you to insert several fields at once, arranged in common variations.

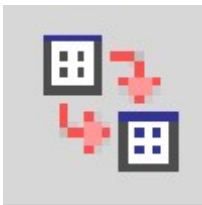


*The **insert address block** button is the one on the left; the **insert greeting line** is on the right*

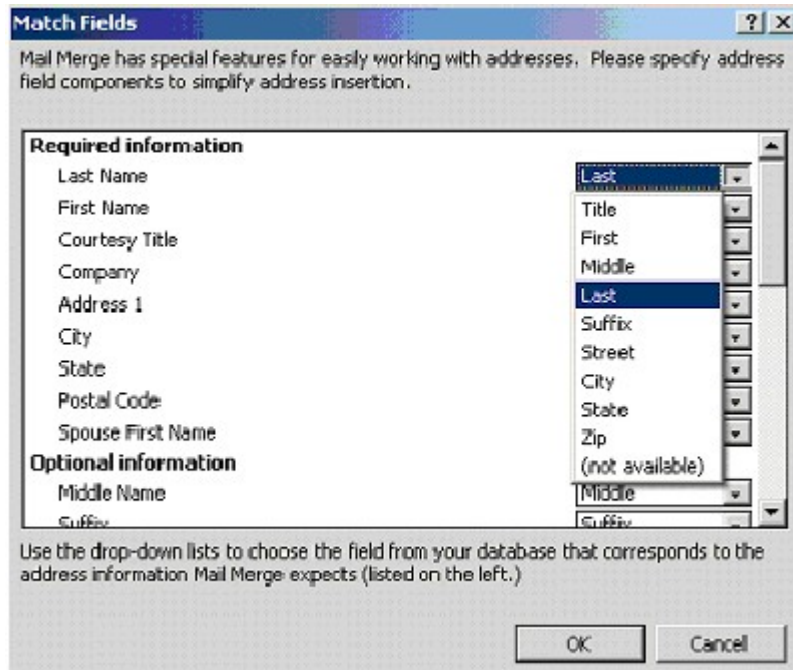
Further, when you click on either button, Word displays a dialog box which gives you some options on which fields you would like inserted, how you would like them to be arranged, what punctuation to include, etc. While this sounds straightforward enough, and it is if you are using a data source created in Word, it can get quite confusing if you are using an Excel worksheet.

Remember my recommendation about using a header row in your worksheet? Well, if you named a field something other than what Word uses as a field name for similar data, Word might match the fields incorrectly. What this means is if you use the **insert address block** or **insert greeting line** buttons, the data might appear in a different order than you specify – simply because the labels don't match. Fortunately, Microsoft anticipated this and built in a **Match Fields** feature that allows you to match your field names to the ones Word uses in the blocks.

To match fields, click on the **Match Fields** button on the toolbar



In the **Match Fields** dialog box, you will see a list of Word's field names on the left. On the right side of the box, you will see a column of drop down boxes. The name in the each drop down box is the field that Word is using for each respective field in the Address block or Greeting line block. To make any changes, simply select the field name from the drop down box. Once you are done making changes, click **OK**.



You can also bring up the **Match Fields** dialog box by clicking the **match fields** button at the bottom of either the **insert address block** or **greeting line** dialog boxes, both of which appear when you click the respective toolbar button.

Before we go on to previewing and printing your merged documents, a note about formatting: When inserting merge fields into a document, Word does not carry over the formatting of the data in the data source. If you want to apply special formatting such as italics, bold, or underline, you must do so in Word. If you are viewing the document with fields, you must select the double arrows on both sides of the field to which you want to apply the formatting. If you are viewing the merged data in the document, simply highlight the text you wish to change. Remember that any change will carry throughout all the merged documents, not just the individual one.

### Previewing the Merged Documents

To preview your merged documents, click the **View Merged Data** button on the **mail merge** toolbar. This button works like a toggle switch, so if you want to go back to viewing just the fields and not the data they contain, click it again.



You can navigate through the merged documents by using the navigational buttons on the **mail merge** toolbar. They are, from left to right: **First Record**, **Previous Record**, **Go To Record**, **Next Record**, **Last Record**



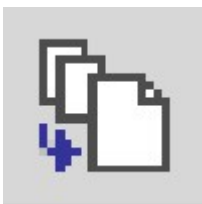
We recommend that before you merge your documents, you preview them all, or as many as you can to verify that everything merged correctly – pay particular attention to things such as punctuation and spacing around the merged data.

When you are ready to merge your documents, you have two choices:

The first is to merge them to the printer. If you choose this option, they will be sent to the printer without any modification. You can merge to the printer simply by clicking the **Merge to Printer** toolbar button:



If you need to personalize some or all of the documents (although, you would be wise to add a note field in the data source for personalized notes) or make any other changes before you print, you can merge them to a new document; if you merge to a new document, the mail merge main document and data source will remain intact, but you will have a second file containing the merged documents. Simply click the **Merge to New Document** toolbar button:



Whichever you choose, you will be presented with a dialog box in which you can tell Word to merge all records, the current record, or a range of records.



Simply click the option button next to your desired choice and then click **Ok**. If you want to merge a range, you will need to put in the beginning number and the final number for the records you wish to include in the merge before you click **Ok**.

If you chose to print the documents, after the dialog box comes up, you will be presented with the **Print** dialog box. You can interact with it the same as you would for any other document.