shortcut

Your Short Cut to Knowledge

Mail and Data Merges Using Word 2007

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Contents at a Glance

What Is a Mail Merge?

Mail merge is a term that can strike fear into the heart of many Word users. Once a tedious and frustrating procedure, it has become a very efficient tool for creating mass mailings like those you probably get in your mailbox every day. The process itself is fairly simple—a form letter (main document) is combined with a source (data file) that contains all of the necessary information to produce a personalized letter for each person in the source.

Mail merge combines a main document with a list of database records to create customized copies of the main document for each record. The most common type of mail merge, of course, is a mailing. Mail merging was originally developed to create form letters, like the kind you probably get in your mailbox every day that address you by name and suggest that you buy some can't-live-without product.

Word 2007's mail merge feature can actually do much more than generate form letters, however. You can use it to generate personalized addresses for envelopes and labels, personalized copies of business reports or children's stories, auction catalogs—just about anything that combines fixed text with variable text.

What's in a Mail Merge?

Let's start by looking at the files involved in a mail merge. A mail merge uses two files:

- The **main document** is a Word document. It contains all the text that doesn't change in whatever you are generating, whether it is a form letter, report, catalog page, and so on.

- The **data file** contains the variable data that is merged with the main document. It can be a Word document (with the data in a table), an Excel worksheet, an Outlook contact list, a Windows Mail address book, a delimited text file, or any of several other data types. See "Selecting a Data Source" later in this Shortcut for more information about data types.

The next thing you need to create a merge file is *merge fields*. Merge fields represent the information in your source (data file). To set up a mail merge, you insert the merge fields that reference the data file into the main document. For example, if the data file has a FirstName field, you might have a greeting line in the main document that looks like this:

```
Dear <<FirstName>>:
```
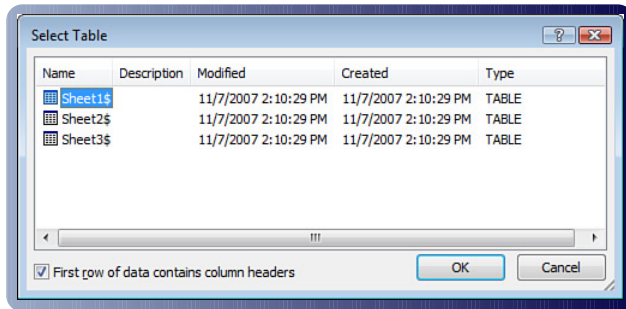
Figure 1.9 *Select the sheet that contains the data to be used in the mail merge.*

4. Click OK. The Excel file is now connected as the data source for the mail merge.

5. (Optional) To confirm that the field names have been set up properly, click the Insert Merge Field button on the Mailings tab. The field names should appear here.

   If generic names appear there instead, check the file in Excel to make sure the field names appear in row 1.

Choosing a Word Data Source

A Word file can serve as a data source, provided that one of these conditions is true:

- The Word document begins with a table, and that table contains the records, one per row, with the field names in the first row. In this case, the Word file is treated like an Excel worksheet.

- The Word document contains the records, one per paragraph, with the fields delimited by a consistent character such as a tab or comma. In this case, the Word file is treated like a delimited text file (discussed later).

To choose a Word document, follow these steps:

1. From the Mailings tab, choose Select Recipients, Use Existing List. The Select Data Source dialog box opens.

2. Select the Word document to use as a data source and click Open.

3. If the records are delimited, rather than in a table, a dialog box might appear prompting you to specify the delimiter character. This happens only if Word cannot figure out the delimiters on its own. Enter the information required and click OK. See the next section for more information on dealing with delimiters.

Choosing a Delimited Text Data Source

In a data source file in which the fields are delimited, you might need to specify which character is used as the delimiter. Word will prompt you if this information is needed. Other than that, the steps are pretty straightforward:

1. From the Mailings tab, choose Select Recipients, Use Existing List. The Select Data Source dialog box opens.

2. Select the text file to use as a data source and click Open.

3. If a Text File Connection Parameters dialog box appears prompting you to specify the delimiter characters, specify the characters used for field and row delimiters, as shown in Figure 1.10, and then click OK.
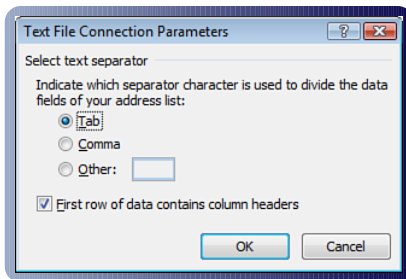
Figure 1.10 *This dialog box opens only if Word cannot figure out the correct delimiter characters on its own.*

WORKING WITH FIXED-WIDTH DATA

A fixed-width data file is one in which the break from one field to another in a record is not indicated by any particular character but instead is decided by a fixed number of characters within the field. For example, in the following list, the field containing first names is 9 characters in size. There are six spaces after "Tom" but only three spaces after "Cheryl" and one space after "Marilynn."

```
Tom       Smith       Redmond    WA
Cheryl    Thomas      Cincinnati OH
Marilynn  Velasquez   Boston     MA
```

Word cannot use a fixed-width data file in a mail merge; it accepts only delimited or tabular data files. However, Excel can import fixed-width data. In Excel, on the Data tab, click From Text and then select the file containing the data. An Excel wizard opens that enables you to select the column widths and import the data. Save your work in Excel and then use that new Excel file as your data source for the mail merge in Word.

Setting Up an Oracle or SQL Database as a Data Source

Word can connect to a variety of database server types, including SQL and Oracle. You set up a data source once, and then you can reuse it without having to go through its configuration again.

To set up a SQL or Oracle database, follow these steps:

1. From the Mailings tab, choose Select Recipients, Use Existing List. The Select Data Source dialog box opens.

2. Click the New Source button. The Data Connection Wizard dialog box opens (see Figure 1.11).
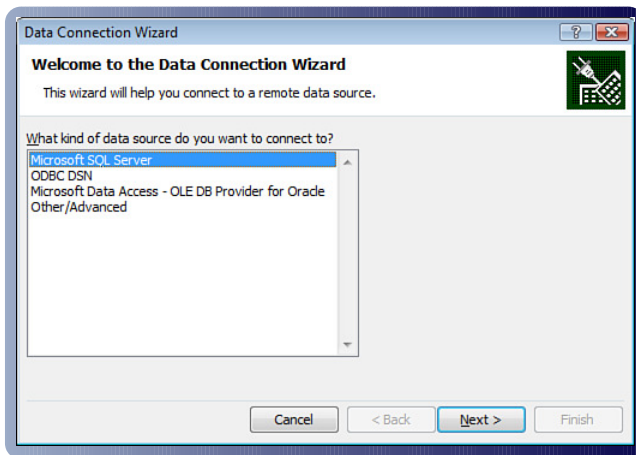
Figure 1.11 *Choose the type of data source you want to set up.*

3. Select the type of server to which you want to connect (Microsoft SQL Server or Microsoft Data Access – OLE DB Provider for Oracle) and click Next.

4. Type the server name in the Server Name box.

5. If the server is on your own network, you might be able to connect to it using Windows Authentication (the default Log On Credentials setting). If not, choose Use the Following User Name and Password and then enter the username and password required to log in to the server.

6. Click Next to continue. Word logs in to the server.

7. When prompted, select the data table or query from which you want to pull records and then click Next.

8. At the Save Data Connection File and Finish screen, enter a filename in the File Name box for the shortcut that will be created to the database.

   You can optionally also enter a description and friendly name.

9. Click Finish to connect to the data source and close the dialog box.

Selecting a Data Source

In the future, you can select the shortcut you just created from the Select Data Source dialog box (step 1) and bypass the other steps.

Using an ODBC Data Source

Open Database Connectivity (ODBC) is a widely used standard for connecting to databases. Data sources that use ODBC use SQL to connect, but they go through an ODBC driver installed in Windows. Using ODBC, you can access Excel workbooks, Access databases, dBASE databases, and other types of sources too if you have ODBC drivers for them, stored either on a server or on a local or network client. For example, if your company's customer database is stored in Access on the main server, you could access it via ODBC for your mail merge.

note

You can also specify Excel and Access files as data sources by choosing them directly from the Select Data Source dialog box, as you would any file. In fact, that's what you did earlier, in the section "Choosing an Excel Data Source." The process is basically the same except the method described in the following steps sets up an `.odb` shortcut to the file for easier access.

Follow these steps to connect to an ODBC data source:

1. From the Mailings tab, choose Select Recipients, Use Existing List. The Select Data Source dialog box opens.

2. Click the New Source button. Choose ODBC DSN from the list of server types (see Figure 1.11) and click Next.

3. Select the type of ODBC data source to which to connect. The items on the list depend on the ODBC drivers set up on your PC; by default, Windows Vista and Office 2007 provide dBASE, Excel, and Access. Then click Next.

4. As prompted, specify the data file you want to use and the specific data table within it.

5. At the Save Data Connection File and Finish dialog box, enter a filename in the File Name box for a shortcut to be created for this data source.

   You can optionally also enter a description and friendly name.

6. Click Finish to connect to the data source and close the dialog box.

In the future, you can select the shortcut you just created from the Select Data Source dialog box (step 1) and bypass the other steps.
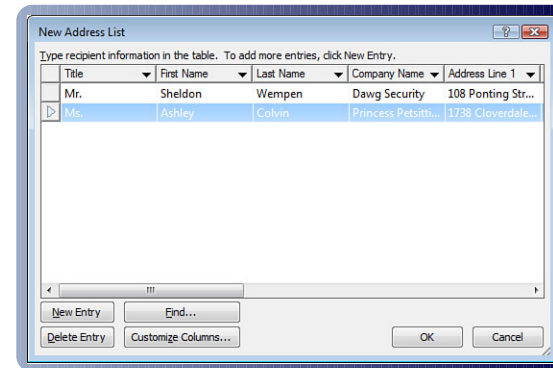
Creating a New Data Source in Word

If the data source does not already exist, you might find it easier to create it from within Word than to fire up some outside program to create it. Word makes it easy to create a simple Access database to hold mail merge data for a personal contacts mailing list, even if you do not have Access installed on your PC and don't know anything about that program. It's all just fill-in-the-blanks.

To create a new data source, follow these steps:

1. From the Mailings tab, choose Select Recipients, Type New List. The New Address List dialog box appears.

2. If desired, customize the field names that appear in the columns. See the "Customizing Fields" section of this chapter.

3. Enter the first record into the top row of the grid provided. To omit a field, simply leave it blank. (Or, if you need additional fields for the record, see the "Customizing Fields" section of this chapter.)

4. To start a new record, click New Entry. Another blank row appears (see Figure 1.12).

Figure 1.12 *Create a new data source by entering records in the rows and columns provided.*

5. Continue adding records until you are finished; then click OK. The Save Data Source dialog box appears.

6. Type a filename to use and change the location if needed.

7. Click Save. Word creates a new Access database containing a single table with the data you just entered. It is stored in the My Data Sources folder by default.

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You can open this database in Access if you have Access installed. Do not change the table name or structure, though, or the connection to your main document in Word will no longer work.