


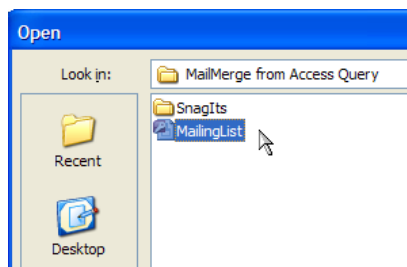
Microsoft Access to Microsoft Word Performing a Mail Merge from an Access Query

Performing a Query in Access

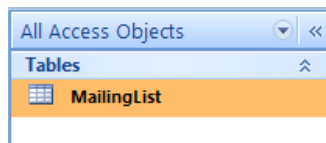
Before performing a mail merge, we need to set up a query with the necessary fields.

Opening your Access Database

- From the **Start** menu, select the **All Programs** submenu.
- From the **All Programs** submenu, select the **Microsoft Office** folder
- From the **Microsoft Office Folder**, select **Microsoft Office Access 2007**.
- Click on the **Office** button  and select **Open**.
- Navigate to the database you wish to open and click **Open**.

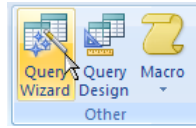


- The **Objects** pane will appear on the left, displaying all of the objects pertaining to your database.

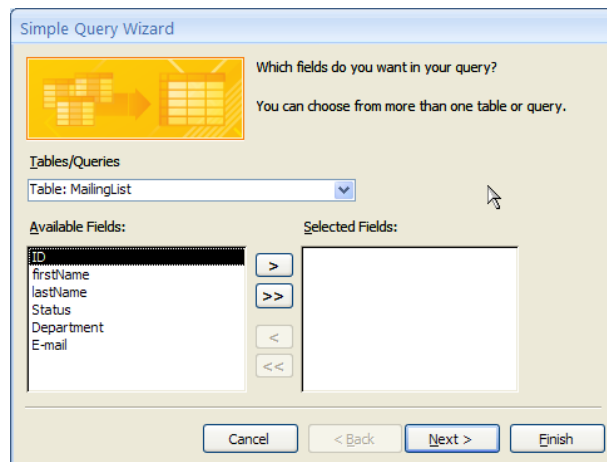


Creating a query using the query wizard

- From the **Create** ribbon, go to the **Other** area and click on the **Query Wizard** button.

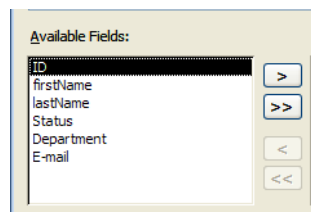


- The **New Query** wizard will appear. Click on “Simple Query Wizard” to make your query.
- The **Simple Query Wizard** window will appear.



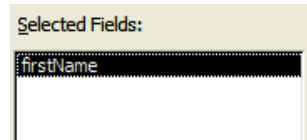
Adding fields to your query

- Click on the down-facing arrow next to the box labeled **Tables/Queries**.
- From the list that appears, click on the name of the first table you wish to use in your query (for example Table: MailingList).
- The fields from the first table will appear in the box labeled **Available Fields**.

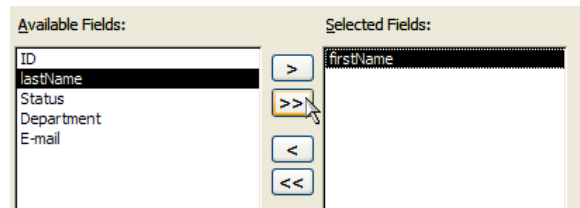


- To select one field from the table to include in your query:
 - Click on the name of the field (for example, firstName).
 - Click on the button labeled with the right-facing arrow.

- The name of the field will appear in the box labeled **Selected Fields**.



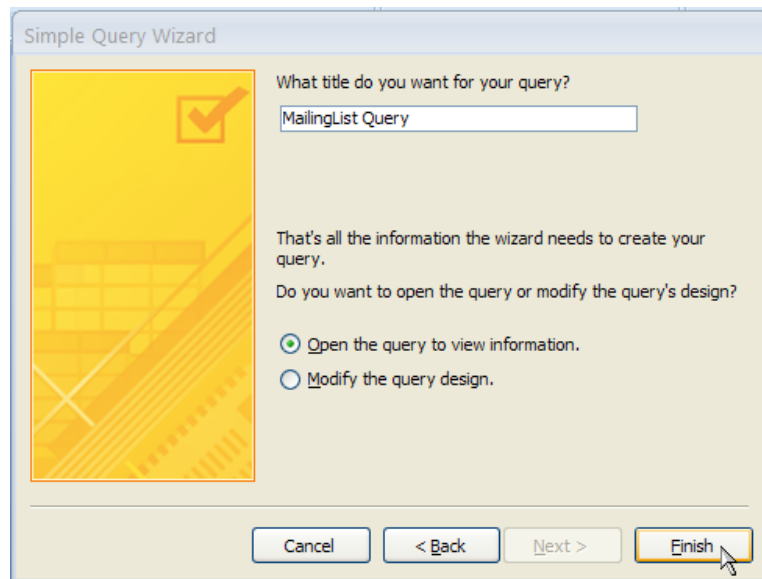
- To select all fields of the table to include in your query:
 - Click on the button labeled with the double right-facing arrow.



- The name of each field will appear in the box labeled **Selected Fields**.
- Once you have finished selecting fields, click on **Next**.

Naming your query

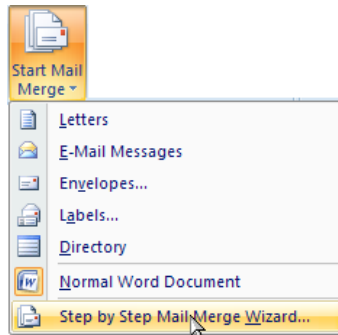
- In the box labeled **What title do you want for your query?** type a descriptive name for your query.
- Once you have named your query, click **Finish**. Your query will then open and display the data retrieved from your database.



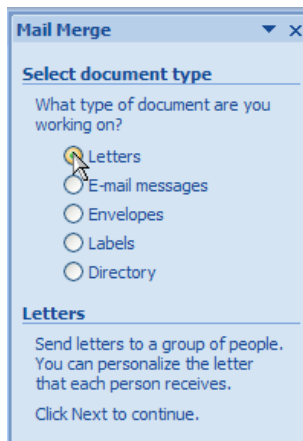
Performing a Mail Merge from a new Microsoft Word document

Opening the mail merge wizard

- To begin, open the Microsoft Word document you want to use as the template document for your form letters.
- From the **Mailings** ribbon, go to the **Start Mail Merge** area, click on the **Start Mail Merge** button, then click on **Step by Step Mail Merge Wizard**.



- The **Mail Merge** pane will appear on the right.



Select document type

You can create form letters, e-mail messages, envelopes, labels, and directories using Word's mail merge capabilities.

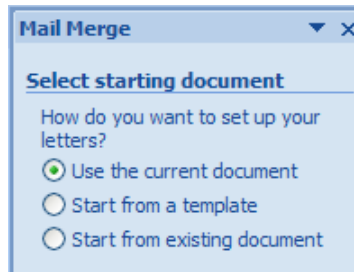
- In the task pane's **Select document type** area, click on one of the option buttons to select the kind of mail merge you would like to perform. *For example, if you are creating form letters, click on the option button labeled **Letters**.*
- At the bottom of the task pane, click on the link labeled **Next: Starting document**.

Selecting starting document

Word gives you three options for choosing the main template for your mail merge letters:

To use....	Click on the option button labeled...
The document currently open in the document window.	Use the current document
A word template (for example, a fax template) as the main document for your mail merge.	Start from a template
A document already saved on your computer.	Start from existing document

- Since your starting document is already open, click on the option button labeled **Use the current document**.

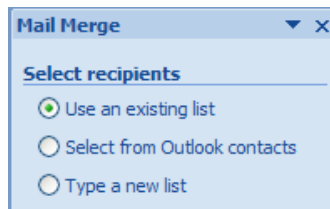


- At the bottom of the task pane, click on the blue text labeled **Next: Select Recipients**.

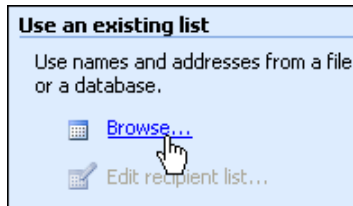
Select recipients

Now that you have selected the type of mail merge you would like to perform and opened the starting document for the merge, you will need to use your Access query.

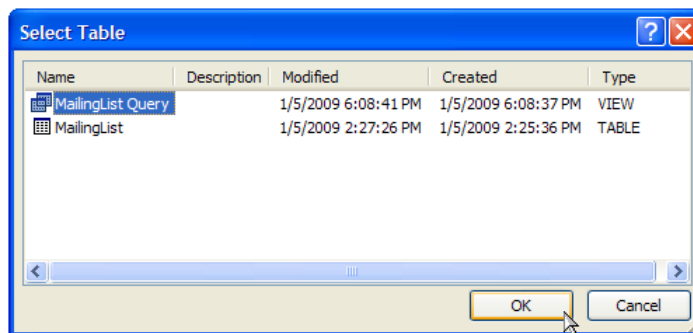
- In the **Select recipients** area, click on the option button labeled **Use an existing list**.



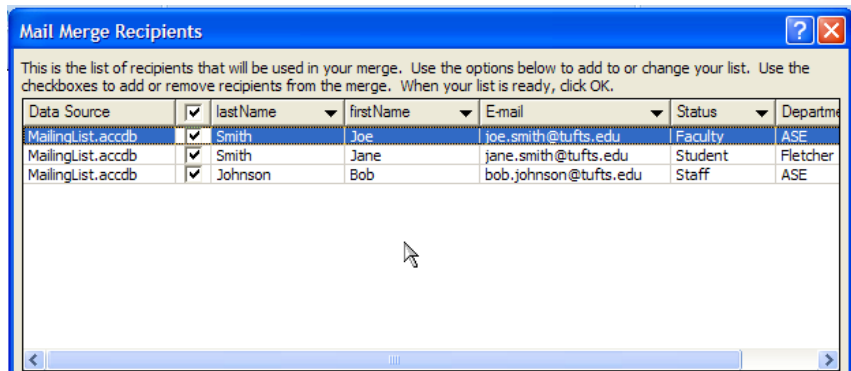
- In the **Use an existing list** area, click on **Browse**.



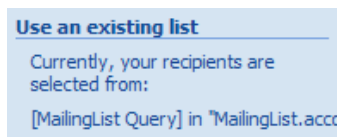
- The **Select Data Source** window will appear. Navigate to your Access database, click on it and click **Open**.
- The **Select Table** window will appear.
- Click on the name of the query that you would like to use as the source of your merge.
- Click on the button labeled **OK**.



- The **Mail Merge Recipients** window will appear.
- Click on the button labeled **OK**.



- Your list name will now appear in the **Task Pane**.



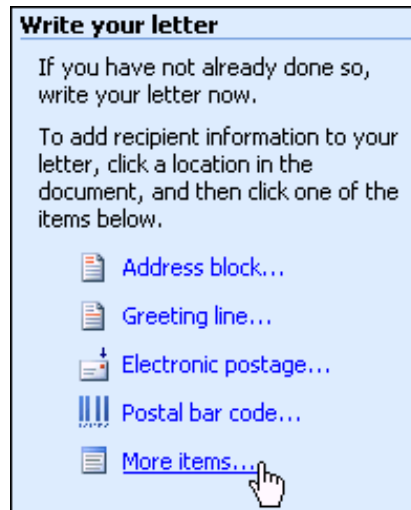
- On the **Task Pane**, click on the link labeled **Next: Write your letter** to begin creating your directory.

Write your letter using fields

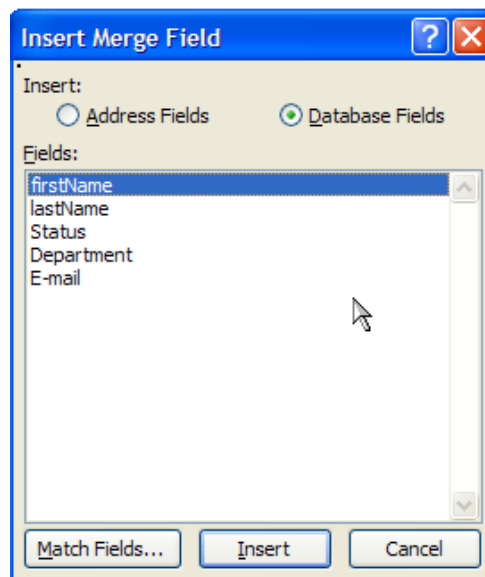
Although Word offers you a variety of generic options for adding merge field data to your form letter, in most cases you'll have more success directly inserting fields from your data document.

To insert data from your data document:

- Click on your document to place the insertion point in the location where you wish to insert the field.
- Next, in the task pane's **Write your letter** area, click on **More items**.



- An **Insert Merge Fields** window will appear with a list of the merge field names from your data source.



- From the **Fields** list, click to highlight the field whose data you would like to insert into the merged document.
- Click **Insert** to place a marker for that field into your document at the insertion point.
- Click **Close** when you are finished inserting merge fields at this location in your document.
- To add more merge fields elsewhere your document, click to place the new insertion point at a new location in your document.
- Repeat the process of selecting and inserting merge fields.
- When finished, click on **Next: Preview your letters** at the bottom of the **Task Pane**.

Tip: Adding multiple fields

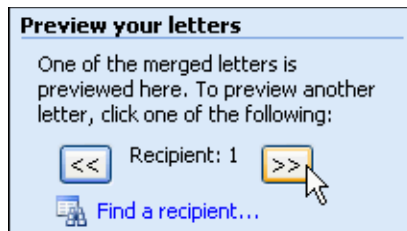
*Adding one field at a time can be tedious when you are trying to add address data at the top of a letter. In this case, you may want to add all the address fields at once. To add multiple fields in quick succession, add each field after the other without moving the insertion point. Once you have finished inserting your field markers, click the **Close** button. Then, move each field marker to an appropriate spot in your document.*



For example, if you need to create an address header, you can add the street address field, city field, state field and zip code field all at the same insertion point. Then, once they are all inserted into the document, you can add the spaces, punctuation and line breaks between each address field.

Previewing your merge document

Navigating through your data

- From the **Preview your letters** task pane area, click on the arrow buttons to navigate through the data from your data source. This serves as a final check of the data from your Access query.



-  Displays the previous record
-  Displays the next record

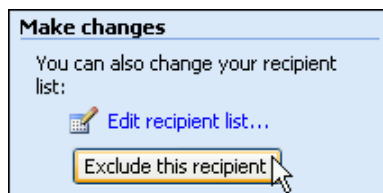
- When you are ready to proceed, click on the text **Next: Complete the merge** at the bottom of the task pane.

Excluding data from the merge

You can also exclude recipients as you preview the merged data.

To exclude a recipient:

- Use the left and right arrow buttons at the top of the task pane to navigate through the data until you find the recipient you would like to exclude.
- Click on the button labeled **Exclude this recipient**. The recipient's data will be excluded from the final merged document.



Editing your merge data

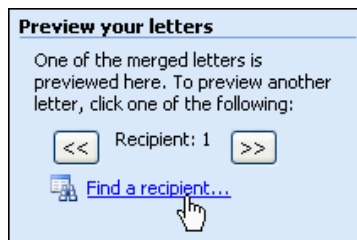
While you preview your merged data, you can also edit the list of recipients that will be used in the final merge. To edit the recipient list:

- Click on the blue text **Edit recipient list** on the task pane.
- The **Mail Merge Recipients** window will appear.
- From this window you can sort, filter and select recipients for your final merge.

Searching for a record in your merge data

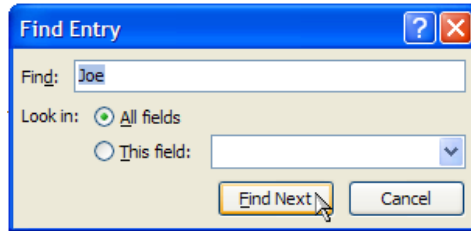
You can also search for a specific recipient whose letter you would like to preview. To find a recipient:

- Click on **Find a recipient** below the navigation buttons on the task pane.



- From the **Find in Field** window, type some text from the record you would like to find in the box labeled **Find what**.

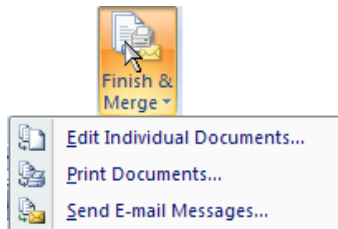
- From the drop-down menu that appears, choose the field in which you would like to search (or select “All fields” to search all fields for an item).
- Click **Find First** to search your data source for the text you specified.



- The first record that matches the search criteria will be displayed in the document window.

Completing your merge


- From the **Mailings** ribbon, go to the **Finish** area and click on the **Finish & Merge** button to view options for completing your merge.

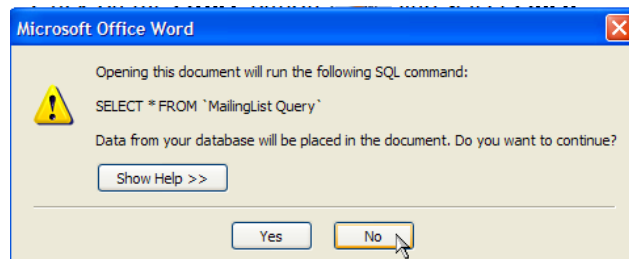


- To personalize your letters, click on **Edit Individual Documents...** Word will create a new Word document (titled Letters1) with each page containing a record of your mail merge. You can personalize each letter from this document and print when finished.
- If you do not wish to personalize your letters, click on **Print Documents...** to print the records you specify or click on **Send E-mail Messages** to send out the records as e-mails.
 - To send out a mass e-mail merge, you will need an E-mail address field in the accompanying Access field and an e-mail account setup in Microsoft Outlook.

Performing a Mail Merge from an Microsoft Word document previously used for a Mail Merge

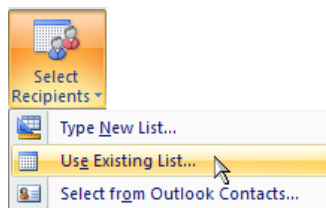
Opening your Document

- From the **Start** menu select the **All Programs** submenu.
- From the **All Programs** submenu select the **Microsoft Office** menu.
- From the **Microsoft Office** menu select **Microsoft Office Word 2007**.
- Click on the **Office** button  and select **Open**.
- Navigate to the document you wish to open and click **Open**.
- An error message will display asking you if you wish to search for your data source.
- Click on the button labeled **No**.



Inserting your Data into the Template

- From the **Mailings** ribbon, go to the **Start Mail Merge** area and click on the **Select Recipients** button.
- From the resulting menu, click on **Use existing list...**



- The **Select Data Source** window will appear.
- Navigate to the database containing your data and click on **Open** to insert your data into the template.
- Follow the steps as before to edit and complete your mail merge.

Saving your Mail Merge

Once you have completed the mail merge and confirmed that it was successful, you want to save the file so that you do not lose your work.

To save your merge:

- From the **Home** button, select **Save As**.
- The **Save As** window will appear.
- Navigate to the desired place on your computer and click on the button labeled **Save** to save your merge.