

# Merging

## Introduction

Microsoft Word can automatically combine one document's text with names, addresses, and other information from another document to create personalized form letters, envelopes, mail labels, and more. The Data Merge Manager makes it a simple process.

## About Merge Documents

It takes two documents to merge:

1. **The Main Document contains the information that will stay the same on all copies. For example, if you're creating a form letter, the Main Document portion contains most of the body of the letter, excluding any personal information that changes for each letter.**

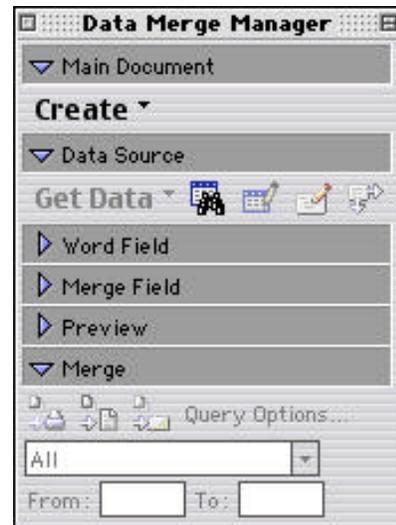
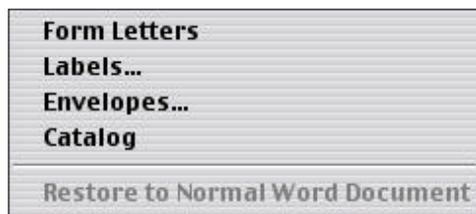
**The Main Document also includes fields that tell Word which data to insert at that point. A mail labels main document just consists of a whole lot of fields.**

2. **The Data Source contains all the information that will be unique for each letter or label, such as Name, Address, etc. This information is usually formatted in Table Format. You can create a new data source using the Data Merge Manager, or if you already have the information in another file, you can use that document.**

Once these two documents have been created, they will be merged into a third document, with the main document information repeated as many times as necessary to accommodate the data source information. When you're saving your results, you only need to save the first two documents: the Main Document and the Data Source. If they've merged successfully once, they will merge successfully again. You can save lots of memory by not saving the resultant merged document.

# Creating Mail Labels

1. Starting with a new document, open the Data Merge Manager (from the Tools Menu).
2. When you click on Create, you are given a choice as to what you want to create. Choose Labels...



3. The Label Options dialog box appears. Nearly every type of common label is preformatted already, so you merely have to choose your label type from the list. For our exercise, we will choose the Avery #5160 label. Find it on the list, then click OK.



- The previously blank document now consists of a table with fields. You don't need to pay a lot of attention to this because it's not done yet.

	<Next Record>	<Next Record>
<Next Record>	<Next Record>	<Next Record>

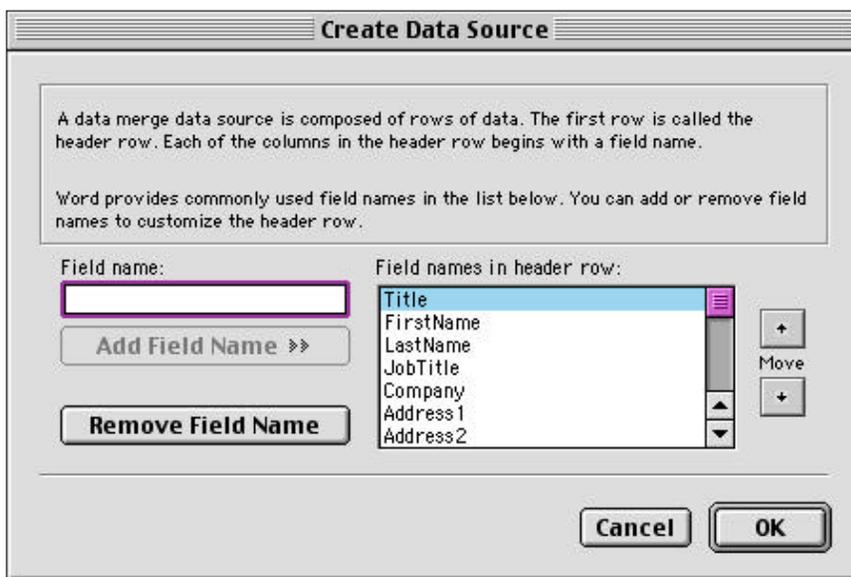
- The next step is to get the data. Click on Get Data. Since we haven't already created our data information, we'll do it now. Drag down to New Data Source... and release.

(TIP: you can get your data from a FileMaker Pro document. You don't need to export from FileMaker into Word first.)



- The Create Data Source dialog box appears. As it explains, a list of commonly used field names is already listed. Go down the list and remove any you won't need. If you need other fields that aren't listed, you can type them into the Field Name box and then click on the Add Field Name.

For our purposes, the only field names we need are: Title, FirstName, LastName, Company, Address1, City, State, PostalCode. Eliminate the rest and click OK. Save this document out on the desktop as MERGE DATA.



- The next box that appears is the Data Form. If you've ever used FileMaker Pro, this looks familiar. You just fill in the information for each person you need a label for.

For our purposes, make records for at least four people. You can make up the information off the top of your head. To maneuver:

- ❖ Hit the Tab key to go from field to field
- ❖ Hit the Return key in the last field to go to a new, blank record.
- ❖ After you've entered four (or more) records, hit the OK button.

- Next, the Edit Labels box appears. In this box you set up where you want the fields to print. Any punctuation you want between fields, you add yourself.

In this case, we want the title and both names to be on the same line, so follow these instructions:

- ❖ Click on the Insert Merge Field box and drag down to Title. Let go.
- ❖ Type a space.
- ❖ Click on the Insert Merge Field box and drag down to FirstName. Let go.
- ❖ Type a space.
- ❖ Click on the Insert Merge Field box and drag down to LastName. Let go.
- ❖ Hit the Return Key

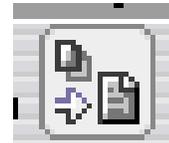
Following this procedure, continue putting in the rest of the fields. Company and Address1 each go on separate lines, while the City, State and ZIP go on one line. You'll have to type the comma between City and State yourself. You'll end up with something that looks like this:



- When you've placed the data fields, click on the OK button. You'll see your main document. Now it looks even worse than before. All the field labels are now in place, but it doesn't look like everything fits. Once again, don't worry. We're not done yet.

«Title» «FirstName» «LastName» «Company» «Address1» «City», «State» «PostalCode»	«Next Record» «Title» «FirstName» «LastName» «Company» «Address1» «City», «State» «PostalCode»	«Next Record» «Title» «FirstName» «Company» «Address1» «City», «State» «PostalCode»
«Next Record» «Title» «FirstName» «LastName» «Company» «Address1» «City», «State» «PostalCode»	«Next Record» «Title» «FirstName» «LastName» «Company» «Address1» «City», «State» «PostalCode»	«Next Record» «Title» «FirstName» «Company» «Address1» «City», «State» «PostalCode»
«Next Record» «Title» «FirstName» «LastName» «Company» «Address1» «City», «State» «PostalCode»	«Next Record» «Title» «FirstName» «LastName» «Company» «Address1» «City», «State» «PostalCode»	«Next Record» «Title» «FirstName» «Company» «Address1» «City», «State» «PostalCode»

- On the Data Merge Manager, locate the Merge heading (it's the last one). It will probably already be visible. If it's not, click on the little arrow on the left to drop it down. Click on the second icon from the left. This will merge your two documents into a third document.



- As you can see, the data fits just fine.

Ms. Kathy Barnham Foothill College 12345 Monte Dood Los Altos Hills, CA 94022	Mr. Bing Crosby Decca Records 6789 Song Bird Lane Beverly Hills, CA 90099	Mr. Dave Garrido De Anza College 51515 Stevens Creek Blvd. Cupertino, CA 95301
Ms. Roberta Barba San Jose State University One Washington Square San Jose, CA 95118	Mr. Ken Hiseiden Hiseiden Industries 55 Gable Lane San Diego, CA 90011	Mr. Keith Duvall EMM 3423 Spruce Way Boulder, Co 80500
Mr. Kerry Lohr Hi Tech High School 888 Learning Way Seattle, WA 98000		

Be sure to print it out on plain paper just to make sure everything fits OK. Then you can print it out on the more expensive label paper.

# Form Letters

For our example, assume you are the manager of a small bookstore that specializes in ordering books for customers. A shipment of books has now arrived and you need to notify customers that their books have arrived. Our form letter will include fields for book titles and book price. We don't need the Company field any longer.

In the case of creating form letters, once again you start with a main document and a data document. I've found that it is easier to create the data document first, and then work on the main document. That allows you to just drop in the data fields while you're creating your main document. (In actuality, it is easy to do either way.) We've already created a data document in the labels exercise (MERGE DATA), so we'll start with that.

1. Open the MERGE DATA document. This document was created when we were making labels in the previous exercise.
2. As you can see, the data is formatted in a table. When you are creating data records to use for merging, you don't need to create the data using Data Merge Helper. You can use any document that is formatted as a table.
3. We no longer need the Company field, so highlight that column. Go up to the Table Menu and drag down to Delete and over to Columns before releasing the mouse.
4. We need to add two more columns. This might cramp our table a bit, so let's switch to landscape view first. To do so, choose Page Setup from the File Menu. In the Orientation area, choose landscape view (the lying down guy).
5. Back in the table, highlight the last two columns (State and PostalCode). From the Table Menu, choose Insert – Columns to the Right. Two new columns will appear. Title the first **Book** and the second **Price**.
6. Create data to fill in these two fields for each record. You should end up with something that looks similar to this:



Title	FirstName	LastName	Address1	City	State	PostalCode	Book	Price
Ms	Kathy	Parsham	12345 El Monte Road	El Monte	CA	94022	Goodnight Moon	\$8.00
Mr.	Mark	Jagger	1 Infinity Circle	Capetina	CA	95050	Rolling Stones Gather No Moss	\$18.00
Mr.	Bill	Gates	One Washington Square	San Jose	CA	95118	Howto Make Friends and Influence People	\$50.00
Ms	Candy	Land	90 Sugar Mt.	Denver	CO	80844	Where the Wild Things Are	\$12.99

7. Save this document and close it.
8. Open a new document. This document will be the Main Document containing the bulk of the letter and the field titles.
9. From the Tools Menu, open the Data Merge Manager.
10. Click on the Create heading and drag over to Form Letters. That identifies this document as the main document.
11. Click on the Get Data heading and drag down to Open Data Source.... Find the MERGE DATA document we just revised. When you do, the heading Merge Field in the Data Merge Manager will expand to include all the fields we've defined.



12. Begin typing your letter. Whenever you get to a spot where merged information goes, drag over the appropriate field header from the list. Be sure to include any punctuation between fields that is necessary. For example, when you're creating the inside address, you need to remember to put spaces between the firstname and lastname fields. Also note that field headers can be used more than once. You'll end up with a letter similar to this:

```

April 9, 2001 ¶
¶
¶
¶
¶
<Title> <FirstName> <LastName> ¶
<Address1> ¶
<City>, <State> <PostalCode> ¶
¶
Dear <Title> <LastName> ¶
¶
Happy Camper Books is pleased to announce that the book you ordered, <Title1>, has
arrived at our store. You can pick it up at your convenience at the front desk. The price
of the book is <Price>. We accept cash, checks, and most major credit cards. ¶
¶
One more time, thank you for your patronage. ¶
¶
Sincerely, ¶
¶
¶
¶
Marian Librarian ¶
Manager ¶

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13. You may want to italicize the book title field.
14. When you're done typing the main letter, you're ready to merge. Click on the Merge Document icon. It's the same one we used for the Labels exercise:



- Carefully look over the first letter. If you see anything you want to change, close this document and don't save the changes. You will be returned to the main document. Make your changes there and then remerge. That way you won't have to make changes to all the merged letters individually.

April 9, 2001  
Mr. Bill Gates  
One Washington Square  
San Jose, CA 95118  
Dear Mr. Gates:  
Happy Camper Books is pleased to announce that the book you ordered, *How to Make Friends and Influence People*, has arrived at our store. You can pick it up at your convenience at the front desk. The price of the book is \$50.00. We accept cash, checks, and most major credit cards.  
Once again, thank you for your patronage.  
Sincerely,  
Marian Librarian  
Manager  
Section Break (Next Page)

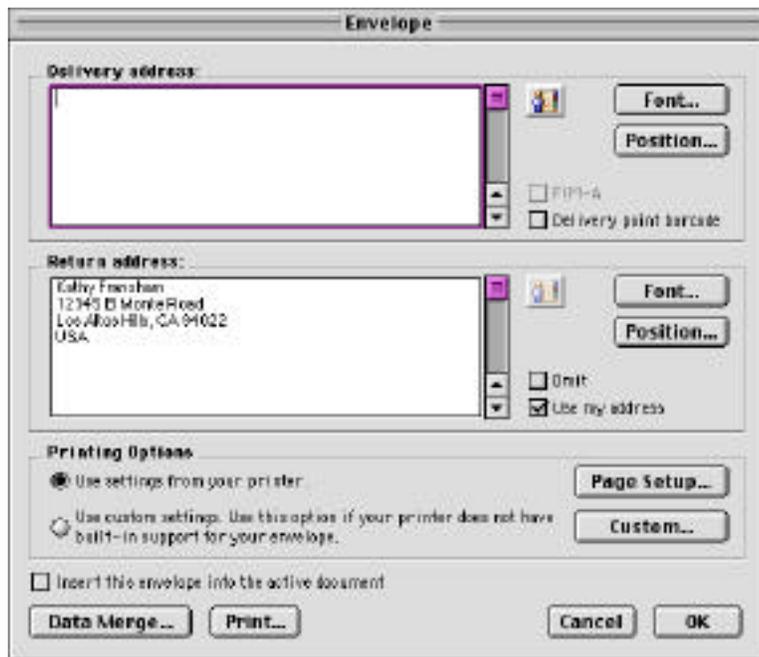
- Once again, save the Data document and the Main document. There is no need to save the merged final document.

# Envelopes

## Introduction

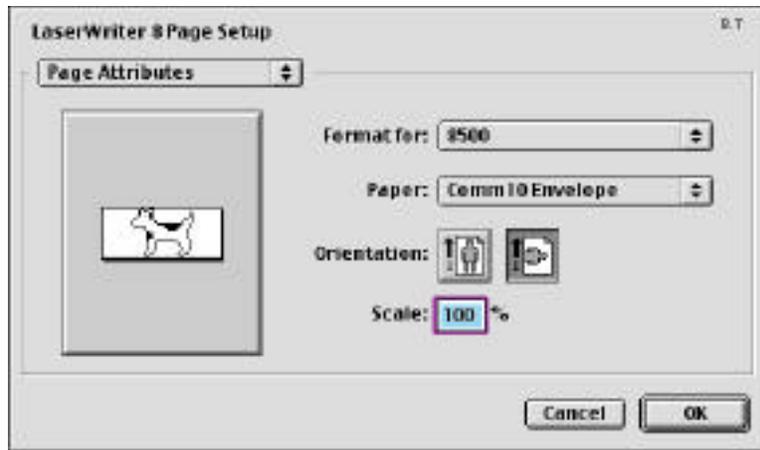
It is a simple matter to create single envelopes using the Envelope feature. You really wouldn't want to make more than a few envelopes this way, however, because they have to be fed through the printer one at a time.

1. Open a new document if one isn't already open.
2. Choose Envelope... from the Tools Menu.



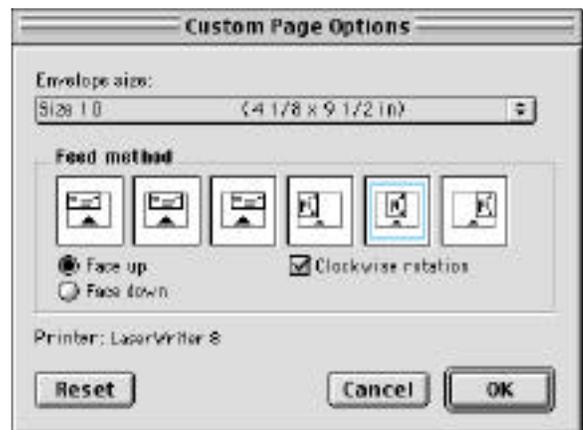
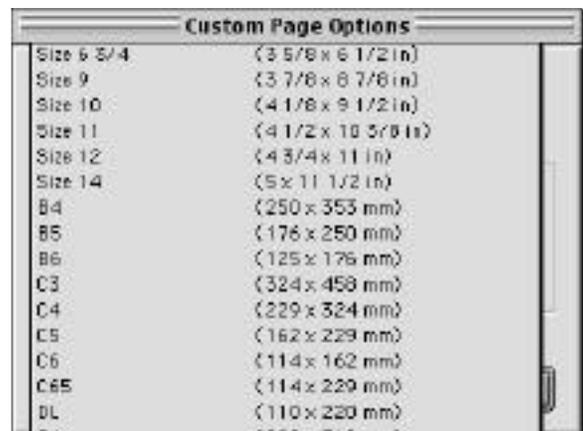
3. As you can see above, the Return address is already inserted. This information comes directly from your computer, so if this isn't your computer, the information is probably not correct. You can choose to omit any return address by clicking on the Omit box, or you can delete any existing information and type in new info.
4. Type in the address you want the letter sent to in the upper box. If you don't like the font, click on the Font... button and change it.

5. In the lower area, choose Page Setup... to see if the printer includes information on the size of envelope you're using. In the box labeled Paper:, choose your size of envelope from the list. If it's not listed, hit the Cancel button.



6. If your envelope size wasn't listed, click on the Custom button in the Envelope dialog box. There is an extensive list of sizes from which to choose. If your envelope size still isn't listed, the easiest thing to do is to choose one that is closest to your size.

Also in the Custom Page Options box, select which way your printer feeds envelopes in. If you're not sure, try printing an envelope out on a piece of plain paper to see where the address goes. If you still can't tell, then get out the printer manual and read about it.



7. Once you've set up the envelope, click on the OK button. A document will appear that looks just like an envelope with the information you inserted. It is ready to print.



8. When you send this to the printer, be sure to check the options for where the printer is to get the envelope. Unless you have an envelope feeder, you will probably choose Multipurpose or Manual Feed. Check your printer manual if you're not sure.

- Auto Select**
- Cassette (Standard)**
- Multipurpose**
- Cassette (Optional 1)**
- Cassette (Optional 2)**
- Manual Feed**

## Labels... Command

The Labels... command allows you to create either a sheet of labels that are all just the same, or a single label. The best use of this command is to create your own Return Address labels. Don't use this command if you want to create a sheet of different labels. Use the Data Merge Manager for that, as previously explained.