Learning Outcomes

- Create Word mail merge file from Access Data

Microsoft makes it easy to use data from one program and integrate it into another. One of the best ways to use Access with Word is in a mail merge. Here is how to have Access and Word work together to create mail merged letters to go out to customers.

PRactice Question

What tool can help Casey create a mail merge letter if she is unfamiliar with creating a mail merge letter with an Access file?

◯ Take a course about Access.

1. The first step is to open the customer contact database in Access you wish to use in the mail merger.
2. Open **Access**, and you will see the list of available sources in the navigation pane on the left, if not press F11 and the left navigation pane opens showing the contact table. Double click to open it.

3. Look through the table or query to identify the addresses to use in the mail merge for Word.
    1. If the addresses are saved in various tables, first create a simple select query with the fields needed, then select the query for the mail merge.
    2. Make sure to check the data for errors or missing cells and correct it before starting the mail merge.
4. Select the **External Data** tab, and in the **Export** group select the **Word Merge** button.
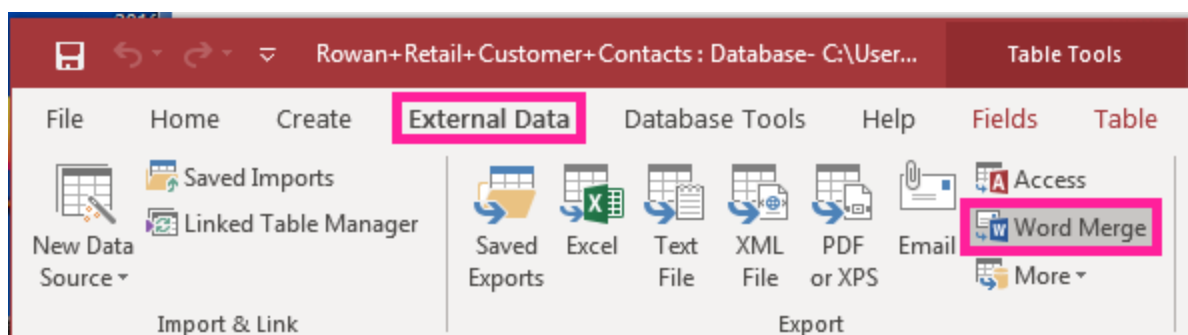
5. A Word Mail Merge Wizard window then opens.
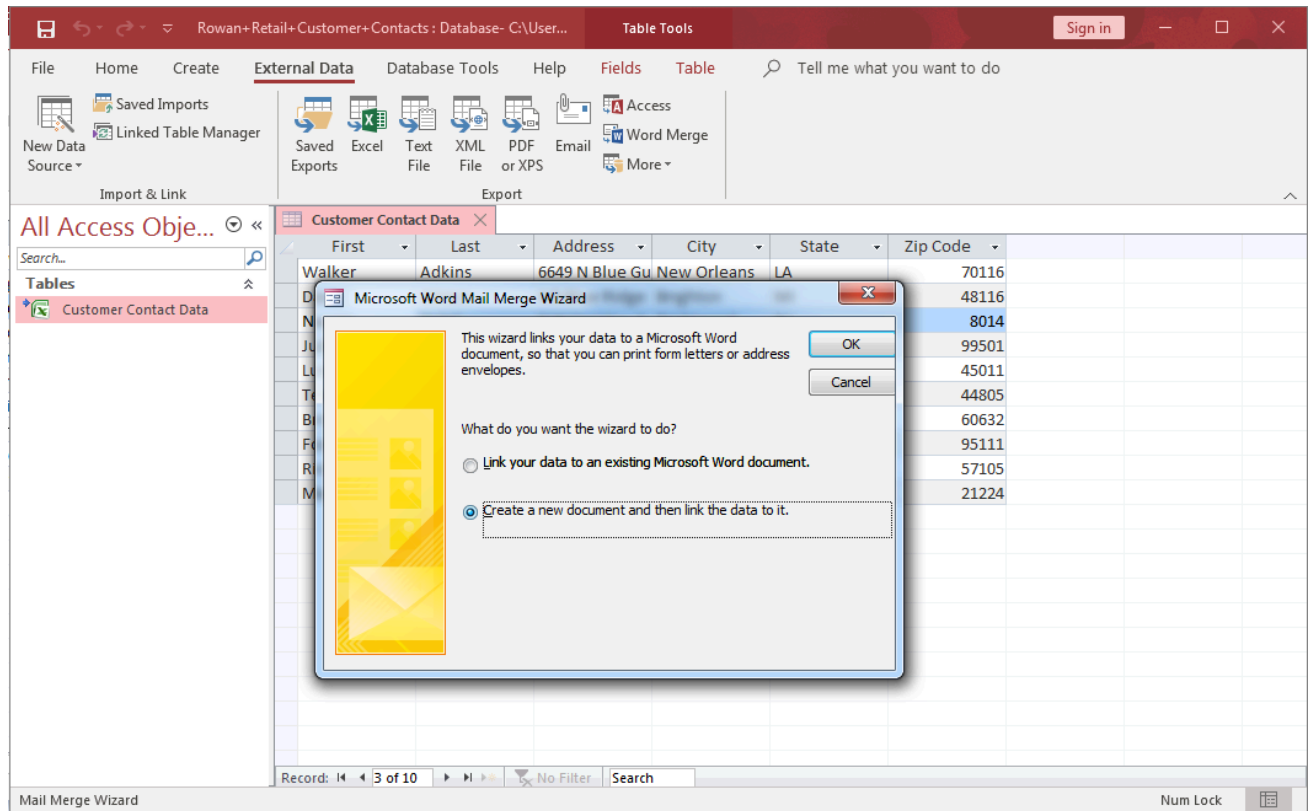
6. Decide if the wizard should like the address data into a new blank Word document or into an existing document. Select the option and click **OK**. For this example, we'll create a new document.
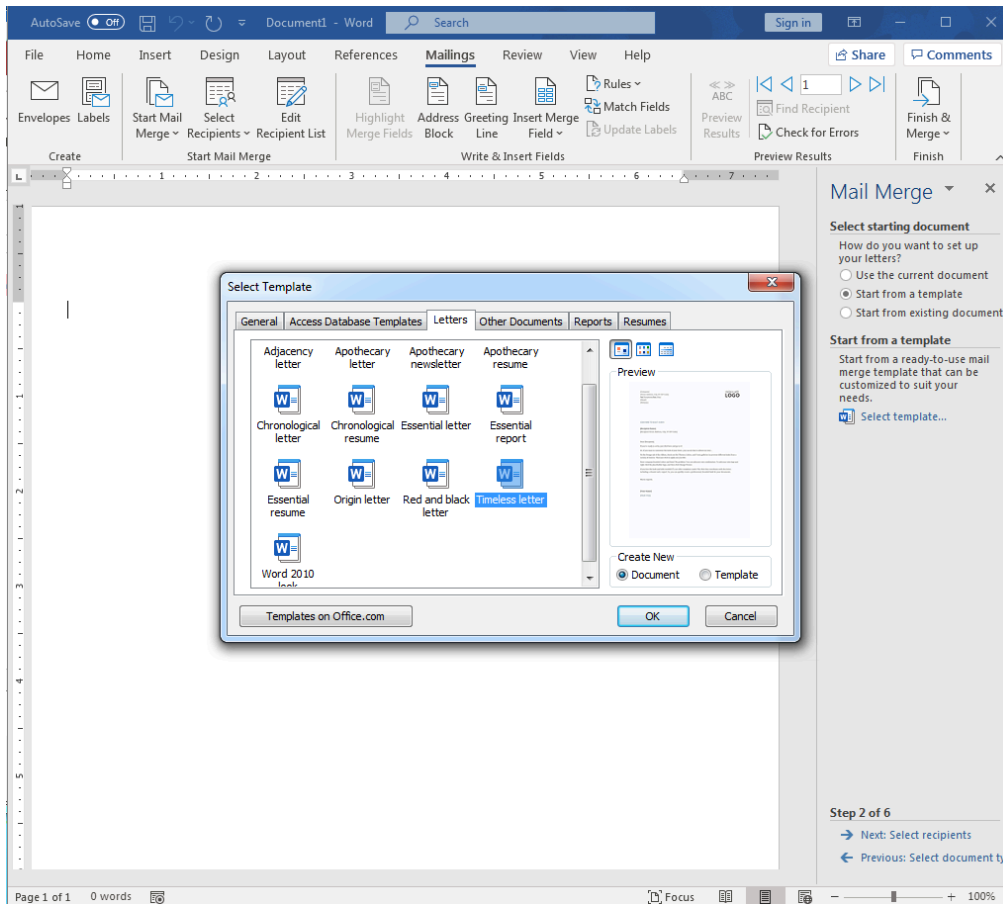7. A Word documents opens, and the **Mailings** tab and **Mail Merge** pane are now open.
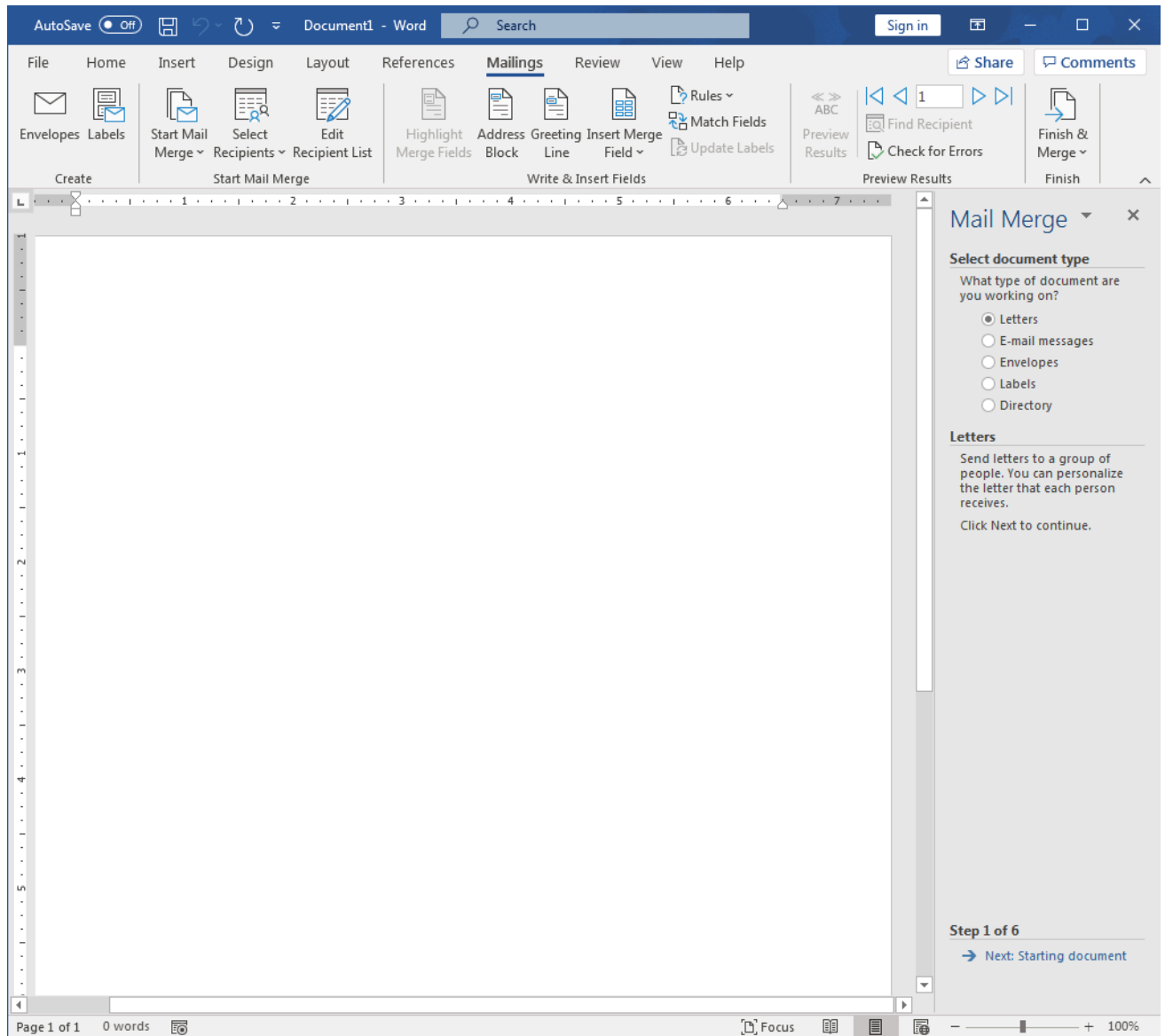
8. In the mail merge pane at the bottom are the wizard steps to walk through using the Next or Previous links. In Step 2 you can choose to compose your own letter or to pick from various templates. We'll choose a template and then update it. Click the link to move to the next step.
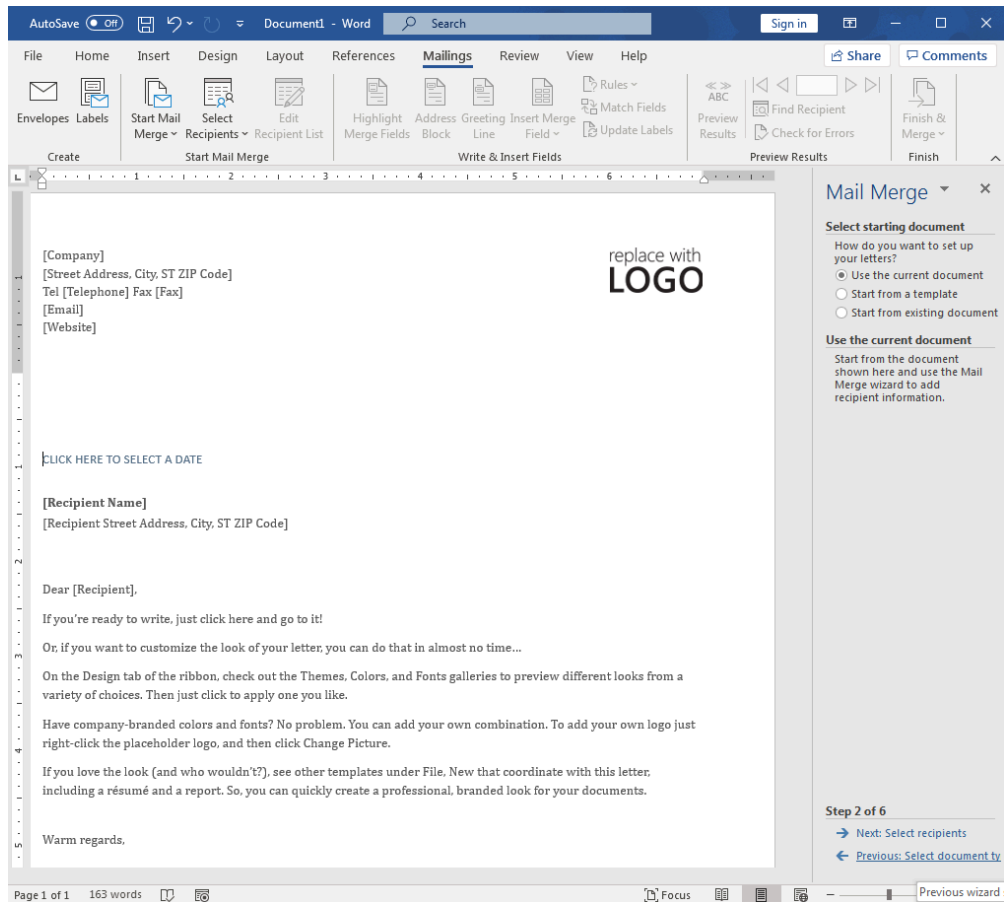
9. In Step 3, select the Access contact file. Select the **Browse** link under **Use an existing list** area and select the Access file.
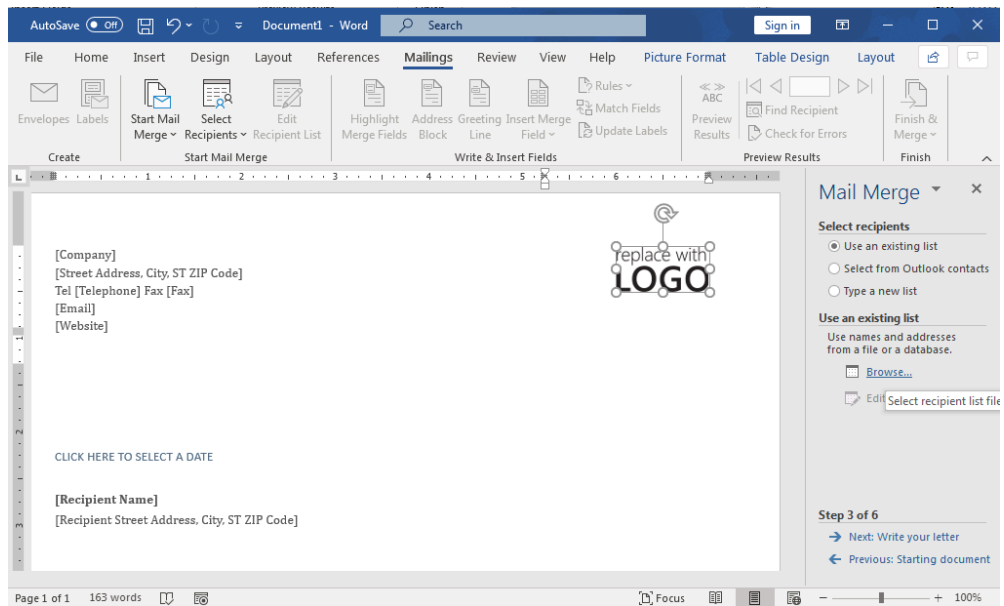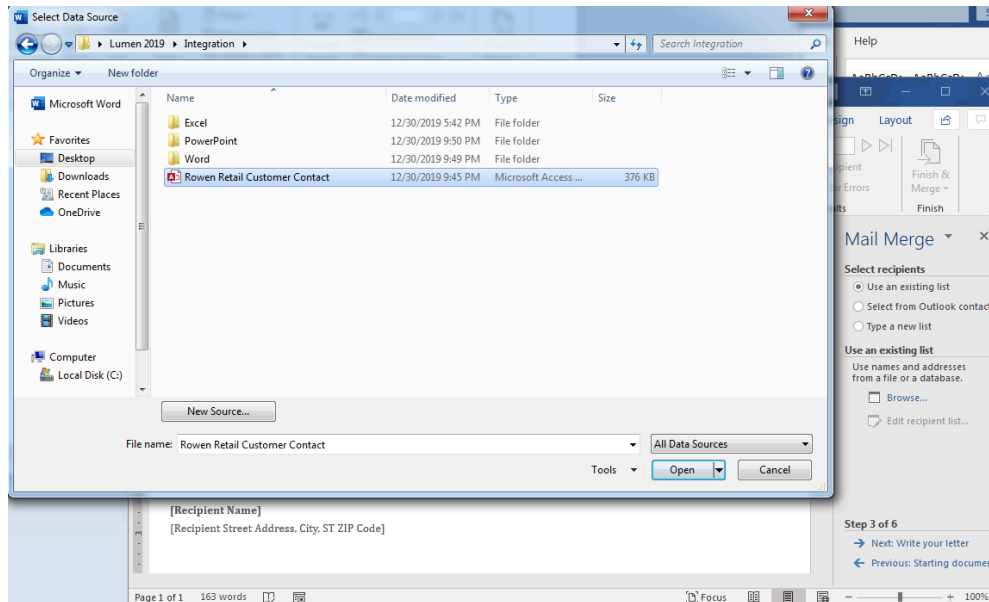
10. If you need to edit the list select the **Edit recipient list** and sort, apply filters, find duplicates, remove contacts, etc. in the open dialog box. In this case we'll use all the contacts for the merge.
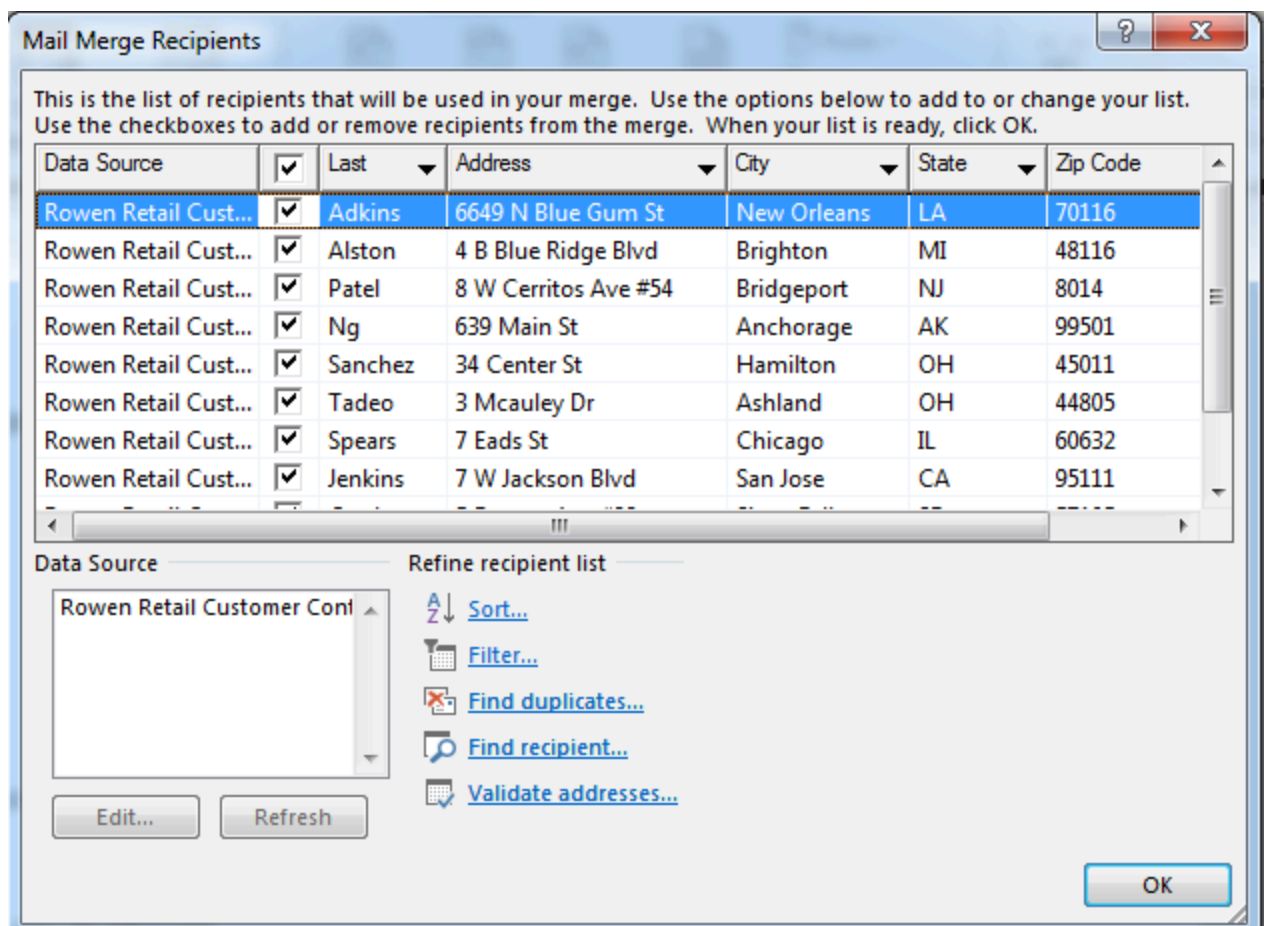
11. Now is the time to in the Word document to edit the letter, select the area for the address

data to appear and select the Address block, Greeting line, etc. in the right side Mail Merge wizard menu and it inserts the Access data into the document.
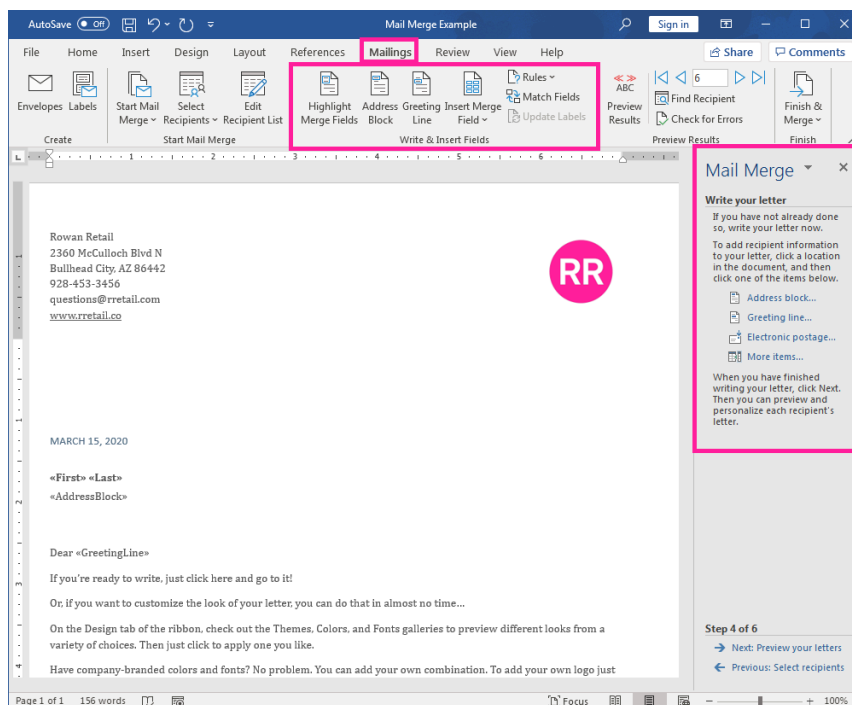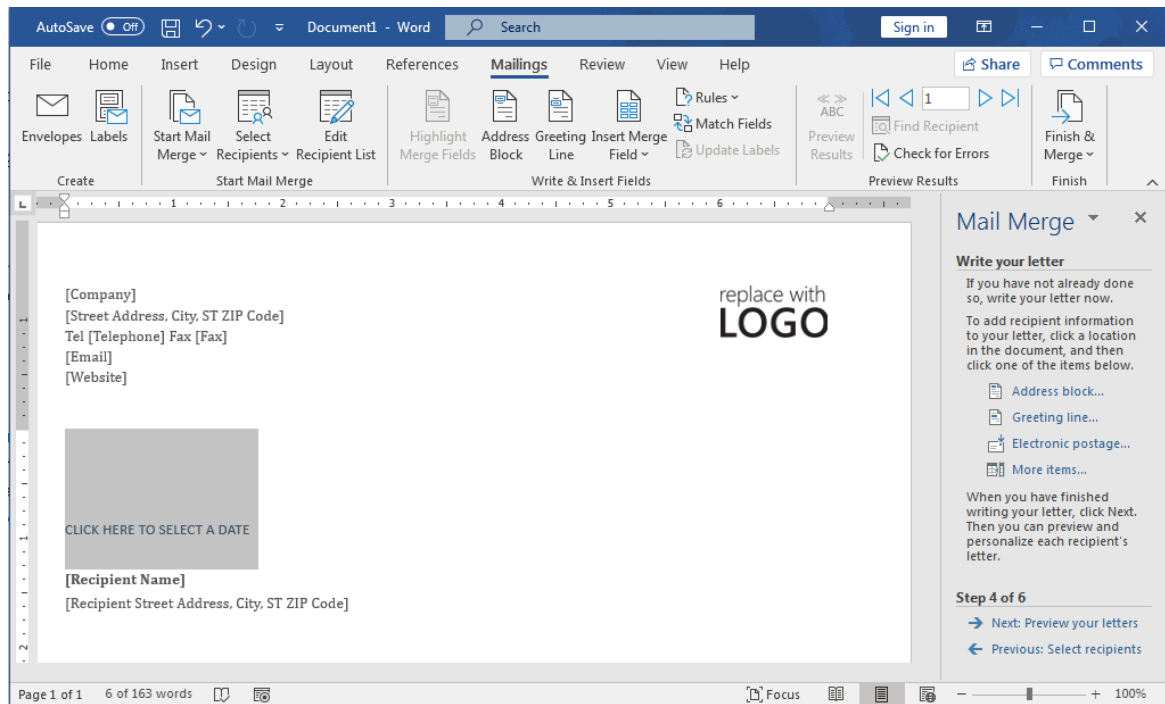
a. Besides using the Wizard, you can format each merging area from the Mailings tab, Write & Insert Fields group in the ribbon.

b. Select the style of greeting, the formality or informality or other options in the dialog boxes for each merge field.
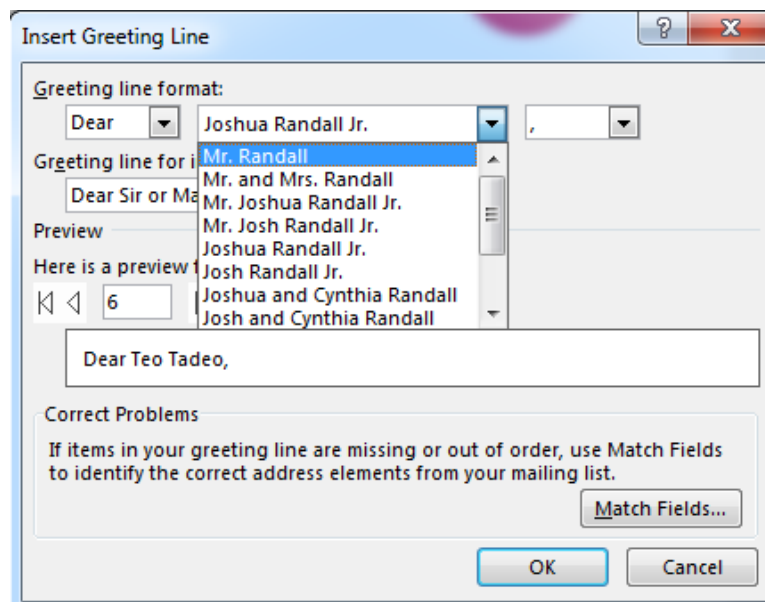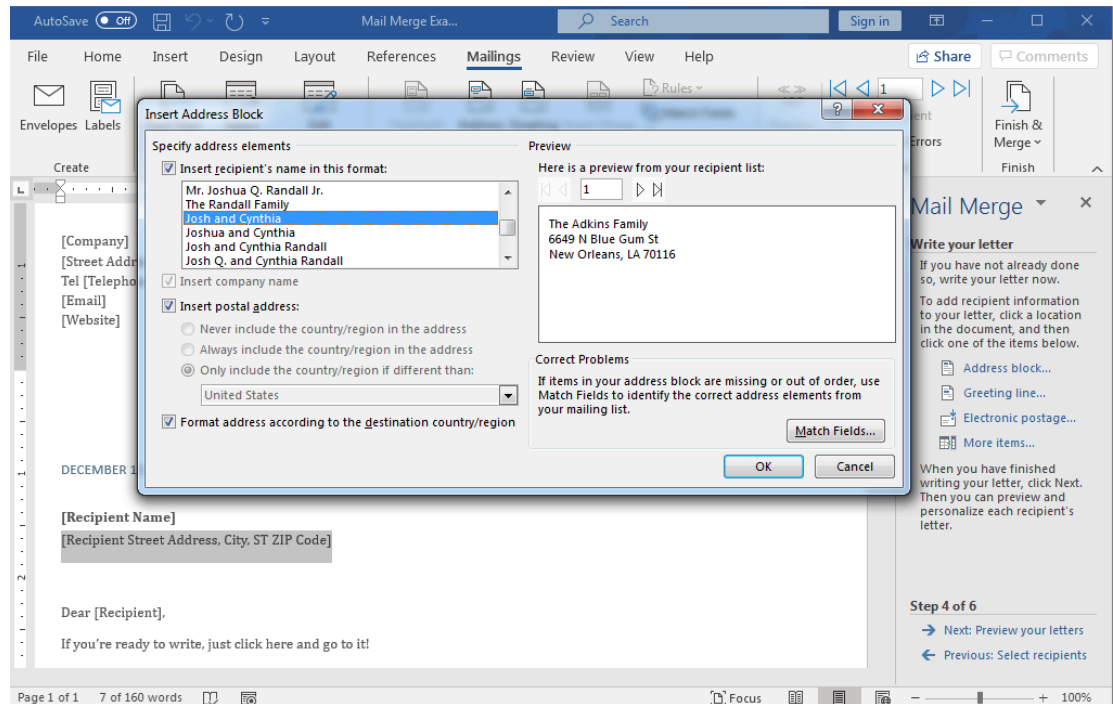
12. The wizard's step 5 allows you to preview the merged data in the document before you print it. Even in this stage you may have forgotten to add a space between the first and last name, too much space in the address field, or other errors. Now is the time to correct them.
    a. Use the **Preview your letters** area to arrow through the recipients and double check for errors.
    b. If you decide at this point to exclude one or a few of the recipients click the Exclude this recipient button or click the Edit recipient list link.
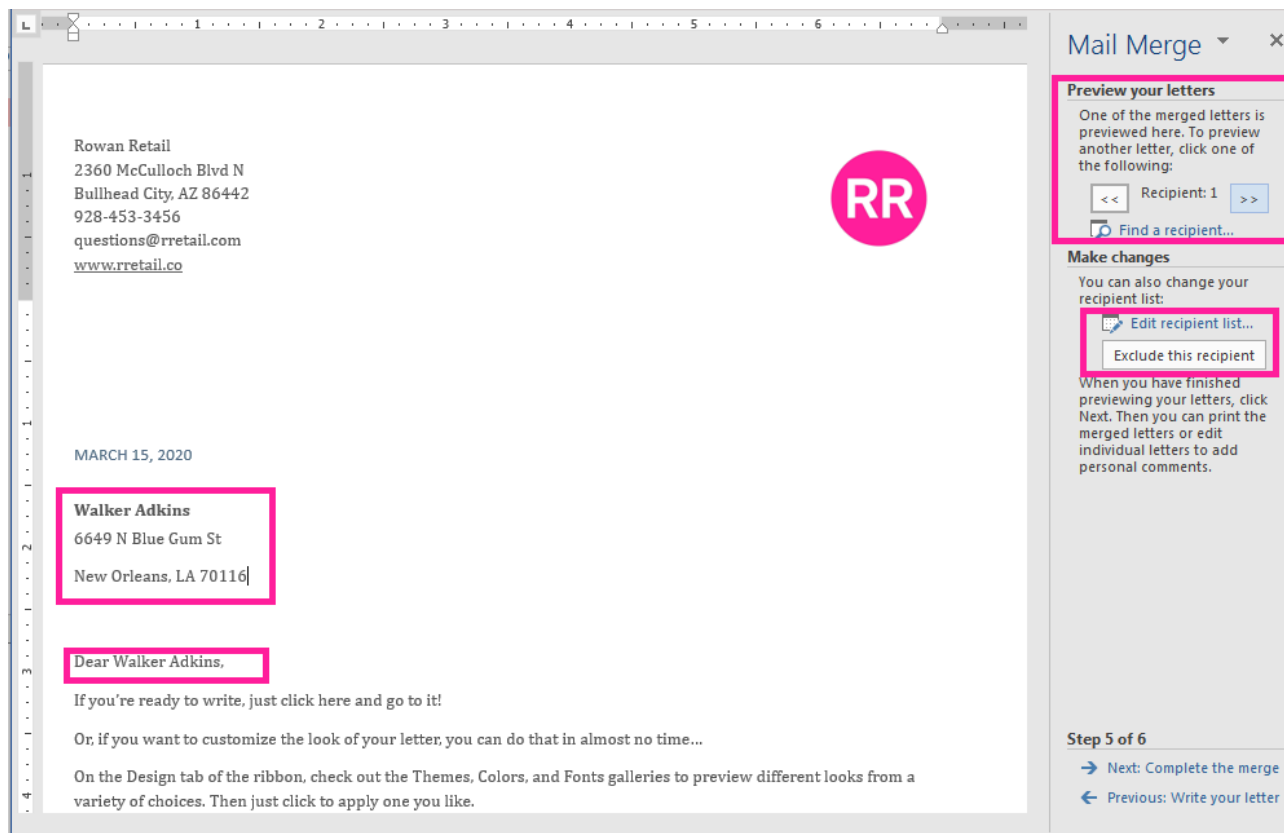
13. Step 5 completes the merge and Step 6 of the wizard is where you Pint the merged document. There is an option at this step to change individual letters by selecting the Edit individual letters link which generates all the letters in one Word file so you can edit.

Print

Printer

Name: HP OfficeJet 6950 (Network) Properties

Status: Idle
Type: HP OfficeJet 6950 Find Printer...
Where: TH7BP26044
Comment: ☐ Print to file

Page range
◉ All
○ Current page   ○ Selection
○ Pages:
Type page numbers and/or page ranges separated by commas counting from the start of the document or the section. For example, type 1, 3, 5–12 or p1s1, p1s2, p1s3–p8s3

Copies
Number of copies: 1
☑ Collate

Print what: Document
Print: All pages in range

Zoom
Pages per sheet: 1 page
Scale to paper size: No Scaling

Options...   OK   Cancel

Mail Merge ✕

Complete the merge

Mail Merge is ready to produce your letters.

To personalize your letters, click "Edit Individual Letters." This will open a new document with your merged letters. To make changes to all the letters, switch back to the original document.

Merge

Print...
Edit individual letters...

click here and go to it!

the look of your letter, you can do that in almost no time...

on, check out the Themes, Colors, and Fonts galleries to preview different looks from a click to apply one you like.

Step 6 of 6

← Previous: Preview your letters

Focus   —▬—— + 100%

14. The last step is to save the new mail merged document for later printing or to send to someone else to print and send these letters.

PRactice Question

What is the first action to be taken when creating a mail merge file from an Access file?

○ Type up the mail merge letter content.

[See this interactive in the course material.](#)

Now that you have walked through the steps of merging and Access table into a Word mail merge letters here is a six minute video to watch and see the entire process to reinforce the steps.

[See this interactive in the course material.](#)

You can also view a transcript for the video ["Mail Merge Microsoft Access Data into Microsoft Word Documents" here (opens in new window)](#).

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