

Microsoft® Word 2007 Mail Merge Tutorial

A comprehensive workbook covering Mail Merge using Microsoft® Word 2007.

This workbook covers the Mail Merge syllabus content for ECDL (European Computer Driving Licence) and ECDL Advanced.

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Word 2007 Mail Merge Tutorial

Course Files

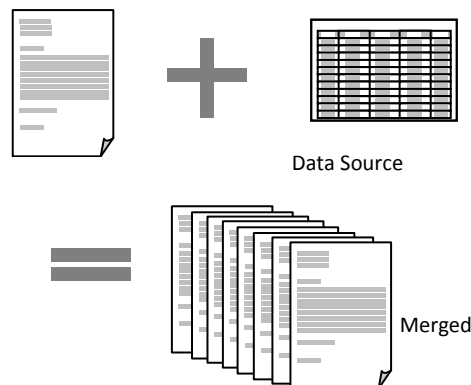
In order to complete the exercises in this workbook, you need a number of files available from: <http://www.brad.ac.uk/Iss/training/resources/word2007mailmerge.exe>

When prompted, please enter your University email username and password. Next click **Run**, then **Run** again, then **Extract**, and **OK**. The files will be downloaded to a folder on your **C drive** called **Word 2007 Mailmerge Data**. When asked to open or save any files, please use this folder.

INTRODUCTION

The Mail Merge feature in Word allows you to personalise mailings sent out to several people, so that the letter contains information specific to each individual (eg their name and address) as well as general information. You can also mail merge to labels, and to e-mails. You can use the Mail Merge feature to create documents other than letters, eg certificates.

In order to mail merge, you need two files – the standard letter or ‘main document’, and the data source or ‘recipient list’. The mail merge process combines information from both files, and then either sends the results straight to the printer (or in the case of e-mail, straight to the recipients), or to a third ‘merged document’.



CREATING A DATA SOURCE AND MAIN DOCUMENT

In the next task, you will create a Data Source, a Main Document and then merge the two.

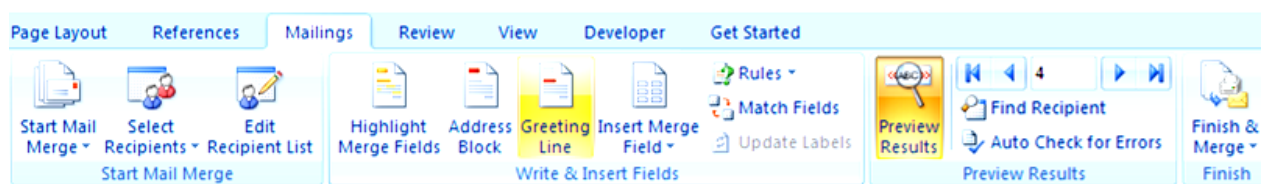
1. Start Microsoft® Word and in a blank document create the following table. This will be the data source.

NB. The Column Headers (Field names) do not contain spaces, eg *FirstName* is all one word. It is important to enter them accurately in order to match up with other tables used in later exercises.

StudentID	FirstName	LastName	Year	School	ReviewDate	ReviewTime
149	May	Knott	1	Health Studies	17 February	11:00
201	Stu	Potts	1	Life Sciences	23 February	09:30
232	Theresa	Green	1	EDT	17 February	12:30

Note: In a data source, each row is known as a **Record**, and each column is known as a **Field**. The column headers (eg Student ID) are called **Field names**.

2. **Save** the document as **Students Year1.docx** in the **Word 2007 Mailmerge Data** folder.
3. Create a **New** blank Word document for the main document.
4. **Save** the main document as **Review Letter Main Document.docx** in the **Word 2007 Mailmerge Data** folder.
5. Select the **Mailings** tab on the Ribbon and use the buttons to go through the following mail merge steps:



- a) **Start Mail Merge – Letters.**
- b) **Select Recipients – Use Existing List** – locate **StudentsYear1.docx**.
- c) **Insert Merge Field** (click on *bottom* half of button).
Type the letter below, inserting the Merge Fields where appropriate.

To: «FirstName» «LastName»
«School»

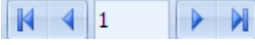
Dear «FirstName»

Your review will take place on «ReviewDate» at «ReviewTime» in P52 Richmond Building. Please be punctual.

Yours sincerely

Course Administrator

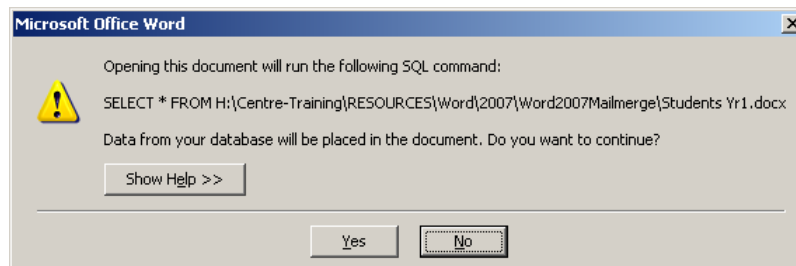
Note: If you would like to see the merge fields more clearly when working on your document, click on the **Highlight Merged Fields** button. Remember to click on this again to remove the highlight before printing!

- d) **Preview Results** – use the navigation buttons  to view each record.
- e) **Finish and Merge** – the following options will be displayed:
- **Edit Individual Documents** – this creates a new document containing the merged information for each individual. See *Edit Individual Documents* on page 3.
 - **Print Documents** – sends the merged documents to the default printer. You can select whether to print all or some of the letters.
 - **Send E-mail Messages** – See *Mail Merge to Email* on page 11.
6. Press the <Esc> key as you are not required to print at this stage.
7. **Save and Close** the main document.

EDIT INDIVIDUAL DOCUMENTS

If you want to customise or edit the information in an individual document (eg details in a letter), you can do this by choosing **Edit Individual Documents** at the **Finish and Merge** stage of the mail merge process. This merges the individual documents into a new blank Word document.

1. In Word open **Review Letter Main Document.docx**. A message similar to the one below will appear, informing you that the main document is still connected to the source file.



2. Click **Yes**. (If you click **No**, your letter will no longer be connected to the source document).
3. From the **Mailings** tab - choose **Finish & Merge – Edit Individual Documents**.
4. Click **OK** to merge **All** records to a new document. Note that this file has another name eg **Letters1**.
5. Save file as '**Merged Review Letter to Yr 1 <date>.docx**'.
6. On the letter to Stu Potts, add the text `Please bring your portfolio.`
7. **Office** button – **Print - Print Preview** to see how the finished documents will print.
8. **Save and Close** the merged document, leaving the main document open.

CHANGING THE DATA SOURCE OF A MERGED DOCUMENT

After adding the merge fields in the main document, you can at any time merge data from a different source. It is preferable that:

- The field names (column headings) are the same in each source file.
- There is no other data, eg a title, in the data source document (Word table/Excel spreadsheet/Access database etc).

Note: If the field names don't match, please see *Non-matching Field Names between Data Sources* on page 18.

To change the data source:

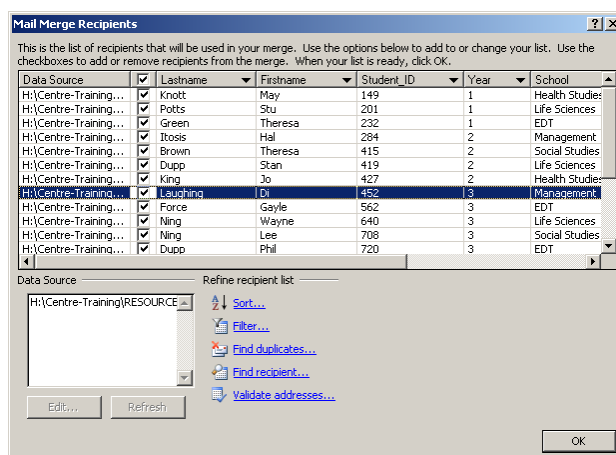
1. Make sure that **Review Letter Main Document.docx** is displayed.
2. **Mailings** tab – **Start Mailmerge** group - **Select Recipients** - **Use Existing List**.
3. Locate the document **Students Yr2.doc** and click **Open**.
4. **Preview Results**.
5. Leave the main document **open** for the next task.

SORTING AND FILTERING

The merged documents can be sorted in order by a particular field, eg by School or Department. You can also select specific records to be merged, or filter them by a certain criteria, eg Year group.

Sorting Merged Documents

1. Open **Students-All.docx**. Notice the data in it and then **Close**.
2. Make sure **Review Letter Main Document.docx** is displayed.
3. **Mailings** – **Start Mail Merge** - **Select Recipients** – **Use Existing List** and then locate **Students-All.docx** as the source file.
4. **Mailings** – **Start Mail Merge** - **Edit Recipient List**. The *Mail Merge Recipients* window appears displaying the list of records.




Simple Sort

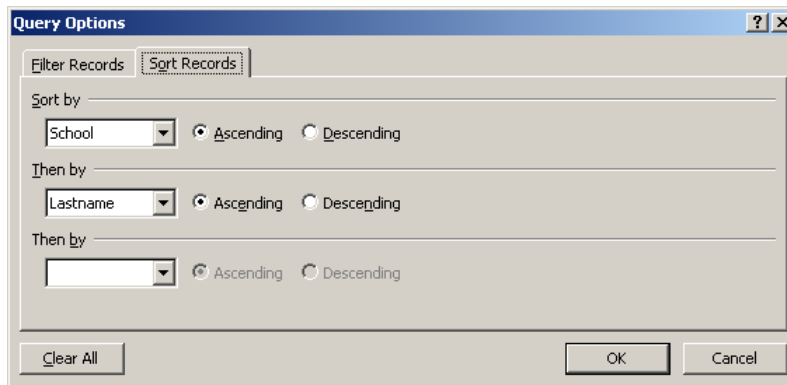
- In the *Mail Merge Recipients* window, click on the **Lastname** field (column) header. Notice how the data is now sorted in alphabetical order by Lastname.
- Click **Lastname** again – notice now that the Lastname column is sorted in descending order (Z-A).

Note: You can sort on any field using the method above.

Multiple Sorts

You can also sort on more than one field, eg sort all the students by *School* and then by *Lastname*.

- In the *Mail Merge Recipients* window, click on **Sort** option.  [Sort...](#)
The *Query Options* dialog box will be displayed.



- In the **Sort Records** tab, click in the **Sort by** box and select **School**. Make sure that **Ascending** is selected.
- In the **Then by** box, select **Lastname (Ascending)**.
- Click **OK**. Notice how the list is now sorted.

Note: Never click the **Clear All** button. There is a problem with Word 2007 that causes the application to crash and you may lose your unsaved work.

- Click **OK** in the *Mail Merge Recipients* window.
- Preview Results** to see the results of the multiple sort, ie the first four records will be to students in the school of *EDT*, sorted by *Lastname*.

Selecting Individual/Multiple Records

You can remove records so that they are not included in the merge, or alternatively select a number of records to be merged from the data source.

- Mailings– Start Mail Merge - Edit Recipient List.** Notice the ticked checkbox for each record.

To remove a record from the merge:

- Click in the checkbox to remove the tick for Arthur Mo and then click **OK**.
- Preview Results** and notice that there is no document for Arthur Mo.

Note: You can select more than one record to be removed from the merge.

To select a number of records to merge:

4. Select **Edit Recipient List** and then click in the checkbox in the field header row. Notice that all of the records are now unticked.
5. Click in the checkbox for **Stu Potts, Jo King, and Gayle Force**.
6. Click **OK** and then **Preview Results**. Notice that only these three records have merged.

Note: These records are not numbered 1, 2, 3 in the Navigation button area, as this displays the record number from the data source.

To select all records:

7. Select **Edit Recipient List** and then click in the field header checkbox to select all records.

Filtering Records

Records can be filtered by a value within a field. Filters can be applied to more than one field.

To apply a filter:

1. **Mailings– Start Mail Merge** - select **Edit Recipient List**.
2. Scroll so that the *School* field header is visible.
3. Click on the arrow in the **School** field header. Notice the different values listed.

Note: Values are only listed if there are a small number. If there are many different values, then you will need to use the steps outlined in

Complex Filtering on page 7 to carry out the filter.

4. Select **Life Sciences** and click **OK**.
5. **Preview Results** - only the *Life Sciences* students are merged.

To add a further filter on another field:

6. **Edit Recipient List** - in the **Year** field header select **1** and then click **OK**.
7. **Preview Results** - only the *Year 1* student in *Life Sciences* will be merged.

To clear the filter(s):


8. Click on the arrow in the **School** field header and then select **(All)**. Repeat this for the **Year** field header.

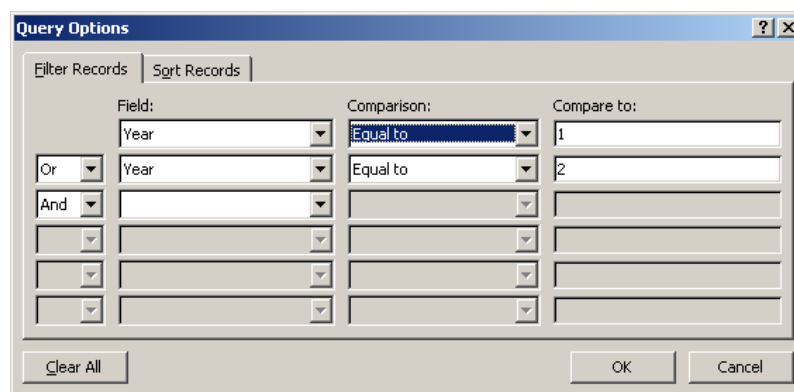
Tip: The arrow in the field header for filtered fields will be a blue colour.

Remember: Do not click the *Clear All* button!

Complex Filtering

More complex filters can be carried out using the *Filter* option when merging.

1. **Mailings– Start Mail Merge** - select **Edit Recipient List**.
2. Click on the **Filter** option. 
3. In the **Field:** box select **Year**.
4. Click in the **Comparison:** box to see what the options are, but leave it as **Equal to**.
5. In the **Compare to:** box type: **1**.
6. In the next row, change **And** to **Or** – the *Field:* to **Year** – *Comparison:* to **Equal to** – *Compare to:* type **2**.



7. Click **OK** and **OK** again.
8. **Preview Results** - the (7) records merged are Year 1 or Year 2 Students.

To clear the filter:

9. Click on the arrow of the **Year** field header, select **1** (first filter) and **1** again (if All is still greyed out) and then select **(All)**.
10. **Save** and **Close** the document.

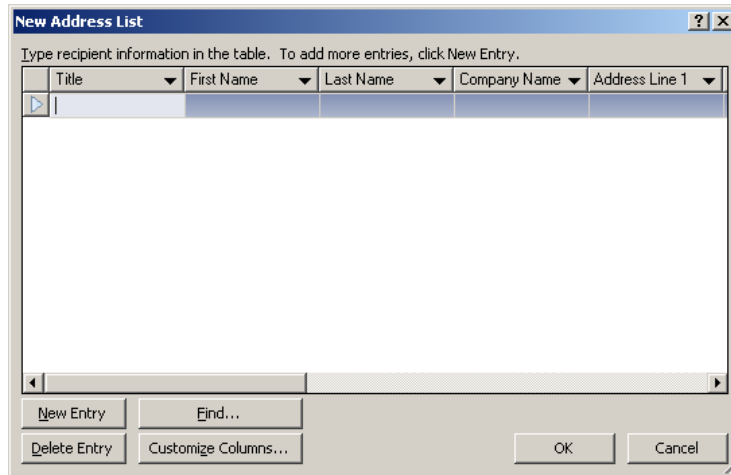
CREATING A NEW DATA SOURCE

It is possible to create a new data source within Word during the mail merge process. This data source will be saved as an Access Database which can be added to or edited during the mail merge process.

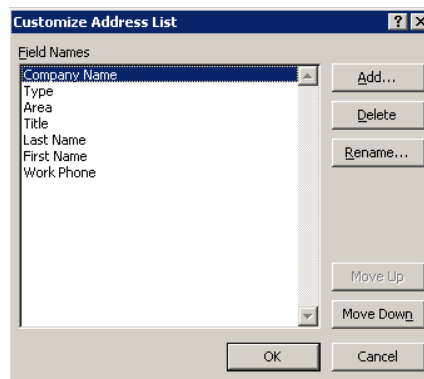
Note: As most data sources are set up independently of the mail merge process, setting it up in Word is only briefly covered. More details can be found by searching for 'mail merge' in Word's online Help (Press the <F1> key to access help).

1. Open a **New** blank Word document.
2. In the **Mailings** tab - **Start Mail Merge** group – click on **Start Mail Merge** and choose **Letters**.

3. Click **Select Recipients – Type New List**. The *New Address List* window will be displayed.



4. Click the **Customize Columns** button and then:
 - a) **Delete** the fields:
 - Address Line 1
 - Address Line 2
 - City
 - State
 - Zip code
 - Home Phone
 - b) **Rename** *Country or Region* field so that it is *Area*.
 - c) **Add** the field **Type**.
 - d) Use the **Move up** and **Move down** buttons to re-order the fields as below.



- e) Click on **OK**.

5. Type the following records into the table:

Company Name	Type	Area	Title	Last Name	First Name	Work Phone
Cakes R Us	Confectionery	Scotland	Mr	Gary	Baldie	09874 480392
Picture It	Photography	Yorkshire	Miss	Faye	Dinn	01274 830291
Tools 4 U	Hardware	Midlands	Mr	Jack	Hammer	01428 232861

Note: The table behaves very much like a Word table. To move to the next field, press the <Tab> key. At the end of a row, press <Tab> to create a new row for your next record.

6. Click **OK**. You will be prompted to save your address list. Locate the folder **C:\Word 2007 Mailmerge Data** and save the list with the *File name* **Company Event**.
7. Type the letter below - **Insert Merge Fields** where appropriate.

11 February 2010
«Company_Name»
«Area»

Dear «Title» «Last_Name»

This is to confirm that you will be allocated a stand at the event on Saturday 27 February 2010. Please bring with you a sample of your «Type» to put on display.

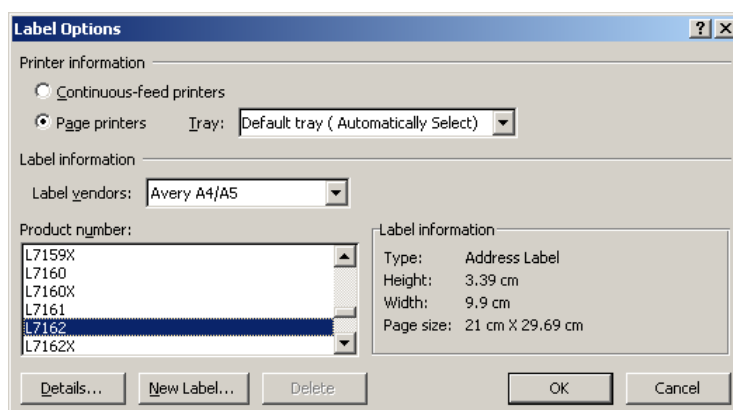
Yours sincerely

Mrs A Brand
Event Organiser

8. **Save** the document as **Event.docx** in the **C:\Word 2007 Mailmerge Data** folder.
9. **Preview Results** and then **Close** the document.

MAIL MERGE TO LABELS

1. Open a **New** blank Word document.
2. **Mailings** tab - **Start Mail Merge** group – click on the **Start Mail Merge** button and select **Labels**. The Label Options dialog box will be displayed.



3. In the *Label vendors:* field select **Avery A4/A5** and then choose the *Product number: L7162*. (This is a commonly used label with 16 labels (2 x 8) on an A4 sheet).

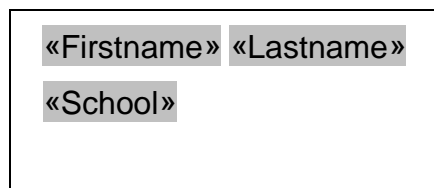
Note: The name of the manufacturer and label details are usually displayed on the label packaging. Avery is a common label manufacturer and other manufacturers will often give the Avery equivalent number.

If your label is not available in the list, click on the *New Label* button to add the name and dimensions. This new label will be stored on your computer for future use – in the *Label vendors:* field select **Other/Custom**.

4. Click on the **Details** button. The dimensions of the labels you have chosen are displayed.
5. Click **OK** and **OK** again to return to the document.
6. Save this document as '**Student Labels – Main Document.docx**'.

Tip: It is easier to see how the labels will look if gridlines are displayed. To do this: **Table Tools – Layout** tab - **Table** group - **View Gridlines**.

7. **Mailings – Start Mail Merge - Select Recipients – Use Existing List** – locate and select **Students-All.docx** as the data source.
8. Make sure the curser is in the first label area, click on the **Insert Merge Field** button and add the fields as below:
9. In the *top left-hand* label, set up the label as below using the **Insert Merge Field** button:



Note: You can format the merge fields in the label (size, font, line spacing etc) by using the buttons on the *Home* tab. Text can also be added, eg Confidential, which will appear on all labels.

10. **Mailings – Write & Insert Fields - Update Labels** button. This will copy the contents of the first label to all of the labels on the page.

At this stage you would normally select **Finish and Merge**, which gives you the same options as if you were creating a letter, for example. Make sure that you know which way the labels go into the printer before selecting Print Documents. If you are not sure, put a cross on the top left of a blank piece of paper and use this to test which way your printer prints!

11. **Save** and **Close** the document.

MAIL MERGE TO EMAIL (OUTLOOK 2007)

You can send a personalised e-mail to a number of recipients. There are limitations:

- Everyone will get the same subject line.
- You cannot attach files to the e-mails.
- Your signature will not appear at the bottom.

To create a data source for this task:

1. Open a **New** Word document.
2. **Insert** tab – **Tables** group – **Table** - select three columns and four rows.
3. Add records, *similar* to those below, containing information *about you, and two of your colleagues*.

Name	E-mail Address	Food
Jo*	<i>j.bloggs@bradford.ac.uk*</i>	salad
Anne*	<i>a.n.other@bradford.ac.uk*</i>	pudding
Sam*	<i>s.anella@bradford.ac.uk*</i>	juice

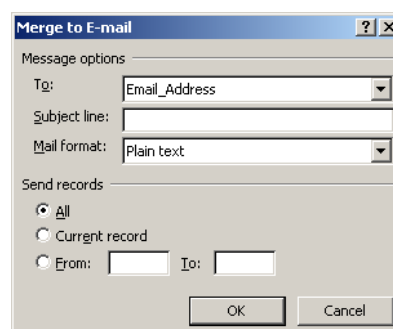
4. Save this document as **Shared Meal Data.docx**, and then **Close**.

To create the main document:

5. Open a **New** Word document and **Save** this document as **Shared Meal E-mail text.docx**.
6. **Mailings** tab- **Start Mail Merge – E-mail Messages**.
7. **Select Recipients – Use Existing List** – locate and select **Shared Meal data.docx**.
8. Type the letter below, using the **Insert Merge Field** button.

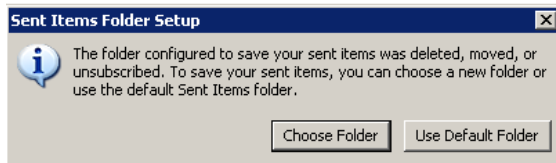
Hi «Name» Can you please bring «Food» to our shared meal? (This is a test email to see if e-mail mail merge works!) Thanks <insert your name>

9. **Preview Results**.
10. **Finish and Merge – Send E-mail Messages**.
The **Merge to E-Mail** dialog box will appear.

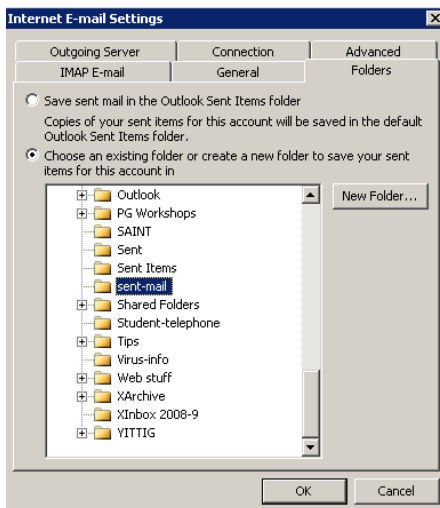


11. In the **To:** field, make sure **Email_Address** is selected.
12. In **Subject Line:** type `Test message`.
13. Leave the default option in the **Mail Format:** field. This may be different to the one above.
14. Click on **OK**.

You may now get one of the following:

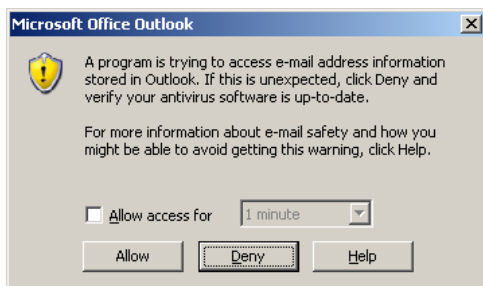


- Click on **Choose Folder** and then the Internet and Settings dialog box will be displayed.



- Select **Choose an existing folder or create a new folder....** option.
- Make sure **Bradford University** is selected.
- Scroll down the list, select **sent-mail** and then click on **OK**.

Note: If you do not go through the above steps, copies of the e-mail will go into the *Sent Items* folder under *Personal Folders* in Outlook 2007.



- This message will appear for each e-mail being sent. Click on **Allow** each time it appears.

Messages will be sent to everyone in your list.

15. **Save and Close** the document.

DIFFERENT TYPES OF DATA SOURCE FILES

The data source can be any file that contains *rows* and *columns*, including:

- Excel spreadsheet.
- Access database table or query.
- Word document containing a table.

- Text (csv) file - a text file with each field separated by commas (or tabs), and each record on a separate line.

The data table must not have any blank fields or records.

Using a Text file as a Data Source

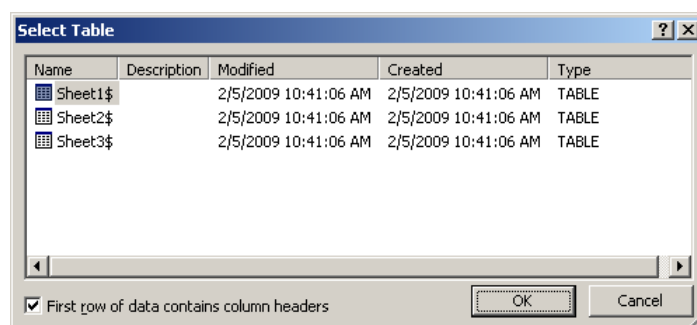
1. Open **New Students.txt**. Notice the format (comma separated), then **Close** the document.
2. Open **Review Letter Main Document.docx**.
3. **Mailings** tab – **Start Mail Merge - Select Recipients - Use Existing List** - locate and select **New Students.txt** as the data source.

Note: If the *Text File Connection Parameters* dialog box is displayed, select the appropriate separator (**Comma** for this task) and then click on **OK**.

4. **Preview Results** and then leave the document **open** for the next task.

Using an Excel file as a Data Source

5. Open '**Students Yr3.xlsx**'. Notice the format, then close the workbook.
6. In the **Review Letter Main Document.docx**, **Mailings – Start Mail Merge - Select Recipients - Use Existing List** - locate and select **Students Yr3.xlsx** as the data source. The *Select Table* dialog box will be displayed.



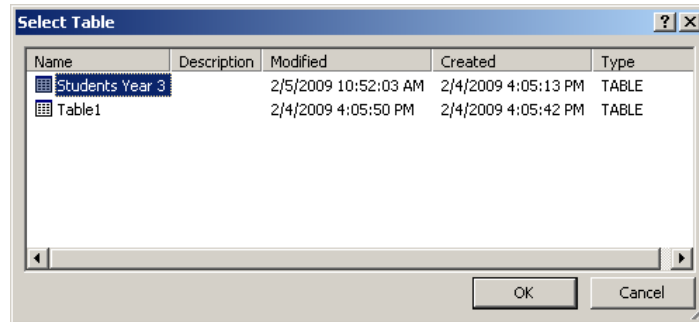
7. Make sure Sheet 1 is selected.

Note: If your data is on a different sheet, you would need to select it from the list. If you have 'named' a data range within the workbook, this will also appear in the list for selection.

8. **Preview Results**. Notice the format of the dates and times. For details on how to change the format see *Formatting Date/Time/Number Fields* on page 17.
9. Leave the document **open** for the next task.

Using an Access Table as a Data Source

10. **Select Recipients - Use Existing List** - locate and select **Students.accdb** as the data source. The *Select Table* dialog box will be displayed.



11. Select the **Students Year 3** table.
12. **Preview Results.** Notice that the formatting for the dates/times is displayed like those in the previous Excel task.
13. **Close** the document, without saving.

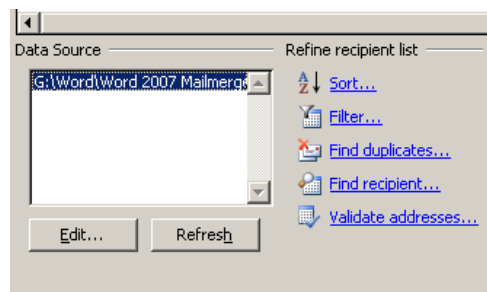
FURTHER FEATURES

The following tasks are optional for those wishing to cover the Mail Merge syllabus content for the ECDL syllabus. They have been added to ensure that this document also covers the syllabus for ECDL Advanced.

Editing a Data Source

The fields within a data source can be edited as required.

1. Open **Review Letter Main Document.docx**.
2. **Select Recipients - Use Existing List** - locate and select **Students Year1.docx**.
3. **Mailings – Start Mail Merge – Edit Recipient List.** The Mail Merge Recipients dialog box will be displayed.
4. In the **Data Source** field, select **Students Year1.docx** and then click on the **Edit** button.



5. Carry out the following tasks in the Data Form window:
 - a) **Delete** the record for May Knott.
 - b) **Add New** record and complete this using your own details.
 - c) Locate Theresa Green and change the **School** to School of Management.
6. Click **Close** and then **OK** to return to the main document.

7. **Preview Results** and then **Close** the document without saving.

If and Ask Fields

Various special fields can be added to a main document to give further options when merging. The following tasks give examples of Ask and If fields.

If Field

This field is used where an alternative can be automatically completed. For example, to give students the location of car parks for a the School.

1. Open **Review Letter Main Document.docx**.
2. **Select Recipients - Use Existing List** - locate and select **Students-All.docx**.
3. **Save** the main document.
4. After the text *P52 Richmond Building*. type Please use the car park.
5. Place the cursor between **the** and **car** and from the **Mailings** tab – **Write and Insert Fields** group – select **If..Then..Else**.
6. In **Field name:** select **School**, make sure **Comparison:** shows **Equal to** and in **Compare to:** type **Management**.
7. In the **Insert this text:** field type **Heaton Mount**.
8. In the **Otherwise insert this text:** field type **Main Campus** and then click on **OK**.
9. **Preview Results** and then **Close** the document without saving.

Ask Field

This field is useful where the data varies.

1. Open **Event.docx**.
2. Delete the text *Saturday 27 February 2010*. in the first paragraph of the letter.

An Ask field works using bookmarks, so this needs to be created where the field information is to be displayed.

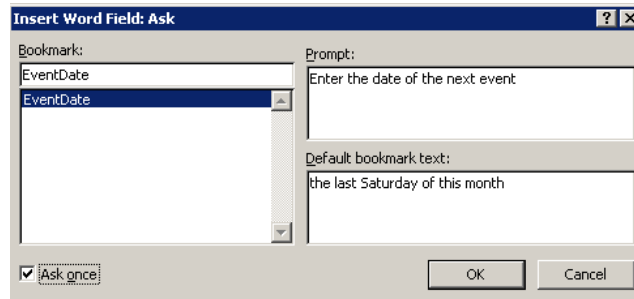
3. Still in the first paragraph, click between **on** and **.** (making sure there is a space).
4. **Insert** tab – **Links** group – **Bookmark** – enter the **Bookmark name** as **EventDate** and then click **Add**.
5. Click to the left of **This is to confirm**.

Note: The location of the Ask field is not important as it is not seen in the finished document. However, it must be before the first bookmark.

6. **Mailings – Write & Insert Fields – Rules – Ask**. The *Insert Word Field: Ask* dialog box appears.

7. Complete the following:

- a) **Bookmark:** - select **EventDate**.
- b) **Prompt:** - type Enter the date of the next event.
- c) **Default bookmark text:** - type the last Saturday of this month.
- d) Select **Ask once** so that all letter have the same response.



8. Click **OK** and **OK** again.

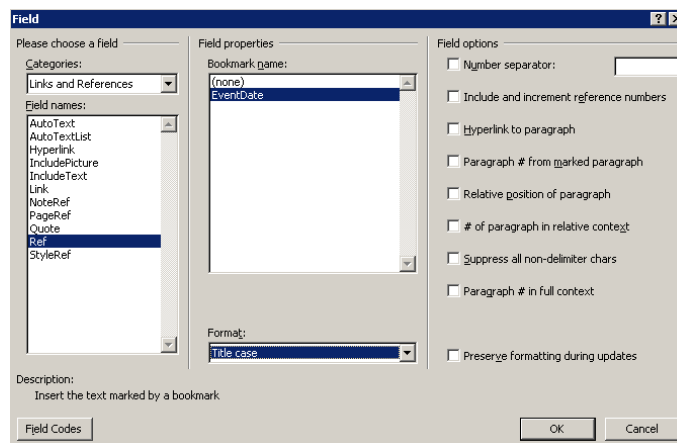
The result will not be displayed unless a **Ref** field has been added.

9. Position the cursor at the bookmark location.

10. **Insert – Text – Quick Parts – Field.** The Field dialog box will be displayed.

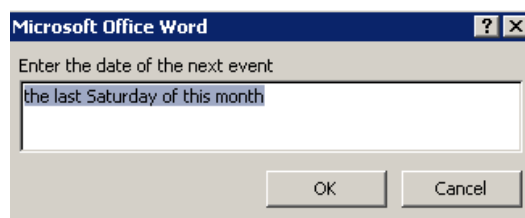
11. Carry out the following:

- a) **Categories:** - select **Links and References**.
- b) **Field names:** - select **Ref**.
- c) **Bookmark name:** - select **EventDate**.
- d) **Format:** - select **Title case**.



12. Click **OK**.

13. **Mailings – Finish - Finish & Merge – Edit Individual Document.** The prompt will appear before the letters are edited.



14. Type 13th March and click **OK**. Notice that the date is added to all of the letters in the merged document.

Note: The prompt will appear if any of the *Finish* options are selected. If you click on **OK** at the prompt without adding any text, *the last Saturday of this month* would have been added to all documents.

15. **Close** all open documents.

Formatting Date/Time/Number Fields

When merging using a Word table or text file as the data source, the data is seen as text and will have the same format when merged into the main document.

If an Excel or Access file is used as the data source, Word 2007 recognises these as database files and keeps the data type format for *Number* fields (eg dates, times) when merged. Any formatting used in the data source will be ignored, eg 17-Feb-10 in Excel, will still appear in the merged document as 02/17/10.

To change the formatting you can either:

- Copy the data to be merged, and paste it into a Word document or text file. Save it and use this as your data source. This is the simplest method if the mail merge is a 'one-off' event.
- Add formatting information (known as switches), to the merge fields in the main document.

To add switches to format fields:

1. Open **Review Letter Main Document.docx**.
2. On your keyboard, hold down the <Alt> key and press the <F9> key. The mail merge fields will be displayed in your document, eg:

{ MERGEFIELD ReviewDate }

The formatting can now be changed by typing a switch inside the brackets of the merge field. To change the format of the review date:

3. Add the text to the merge field as below, making sure that there is a space before \ and after @.

{ MERGEFIELD ReviewDate \@ "d/M/yy" }

4. Press <Alt> + <F9> again.
5. **Select Recipients** – locate and select **Completed Students.xlsx** as the data source, and then select Sheet 1\$.
6. **Preview Results**. The review date will now be displayed as 20/2/09.

Tip: If the results are not formatted as expected, right-click in the data field and select **Update Field**.

Here are some further examples of switches that you can use to format fields.

Date Switches - Examples for the date Wednesday 4 February 2009

Switch	Result
\@ "d/M/yy"	4/2/09
\@ "dd/MM/yyyy"	04/02/2009
\@ "dddd d MMMM yyyy"	Wednesday 4 February 2009

Time Switches - Examples for the time 17:23

Switch	Result
\@ "hh:mm"	17:23
\@ "h-mm AM/PM"	5-23 PM

Number Switches - Examples for the number 123.456

Switch	Result
\# 0	123
\# 0.00	123.46
\# £0.00	£123.46

For further details of how to format switches:

- Open Word Help (<F1> key).
- Select **Automation and programmability**.
- Select **Field Codes** and then select **Field codes in Word**.

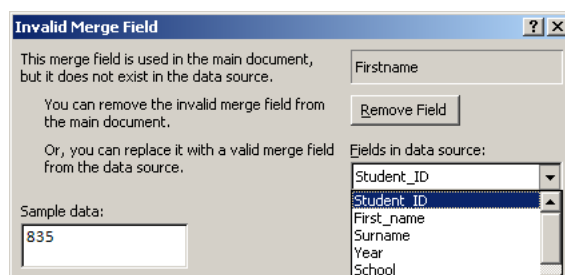
Non-matching Field Names between Data Sources

When changing the data source of a main document, if the field names of the new data source do not match those in the original one, you can either:

- Remove the merge field from the main document.
- Replace the existing merge field with one from the new data source.

To replace the merge fields:

1. Open **Review Letter Main Document.docx**.
2. **Select Recipients - Use Existing List** - locate and select **Students All.docx** and notice the field names.
3. Open **Completed Students.xlsx** to see how the data has been entered and note the different field names (eg First Name instead of Firstname).
4. **Close** the spreadsheet.
5. In **Review Letter Main Document.docx - Select Recipients** – locate and select **Completed Students.xlsx** as the data source and select **Sheet 1\$**.
6. **Preview Results**. The *Invalid Merge Field* dialog box will be displayed.



7. Click in **Fields in data source:** and select **First_name**.
8. Repeat the previous step until all the inconsistent field names have been replaced.
9. **Preview Results**.

Tip: The field names in the main document have now been changed. If you save the main document these fields will not match those used in previous data sources. If you do need to create/use different data sources, it is easier to change the field names in the data source!

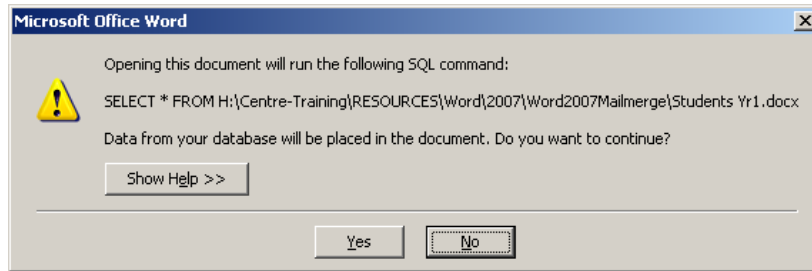
10. Close main document without saving.

When the Data Source has been Moved or Deleted

When a previously merged main document is opened, it links to the data source. If the data source has been moved, you can select an alternative. If the data source has been deleted, you can remove the link to the data source.

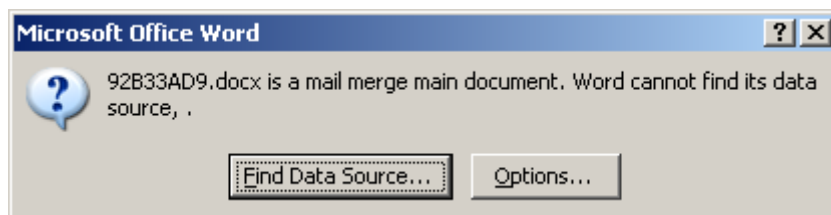
1. Open **Review Letter Main Document.docx**.
2. **Select Recipients - Use Existing List** - locate and select **Students Yr1.docx**.
3. **Save** and **Close** the document.
4. Using *Windows Explorer*, move the **Students Yr1.docx** document to the *My Documents* folder.

5. Open **Review Letter Main Document.docx**. The following dialog box will be displayed.



Note: If you click **No**, the link to the data source will be broken, and you can then **Select Recipients** and locate the appropriate data source file.

6. Click **Yes**, and then the following dialog box will be displayed.



Experiment with the different options. If you:

- Choose **Find Data Source**, you can browse to the new location of the data source.
- Choose **Options**, the following dialog box is displayed giving you two options, both of which will remove the data source.

