

15.11: Access and Mail Merge

Learning Outcomes

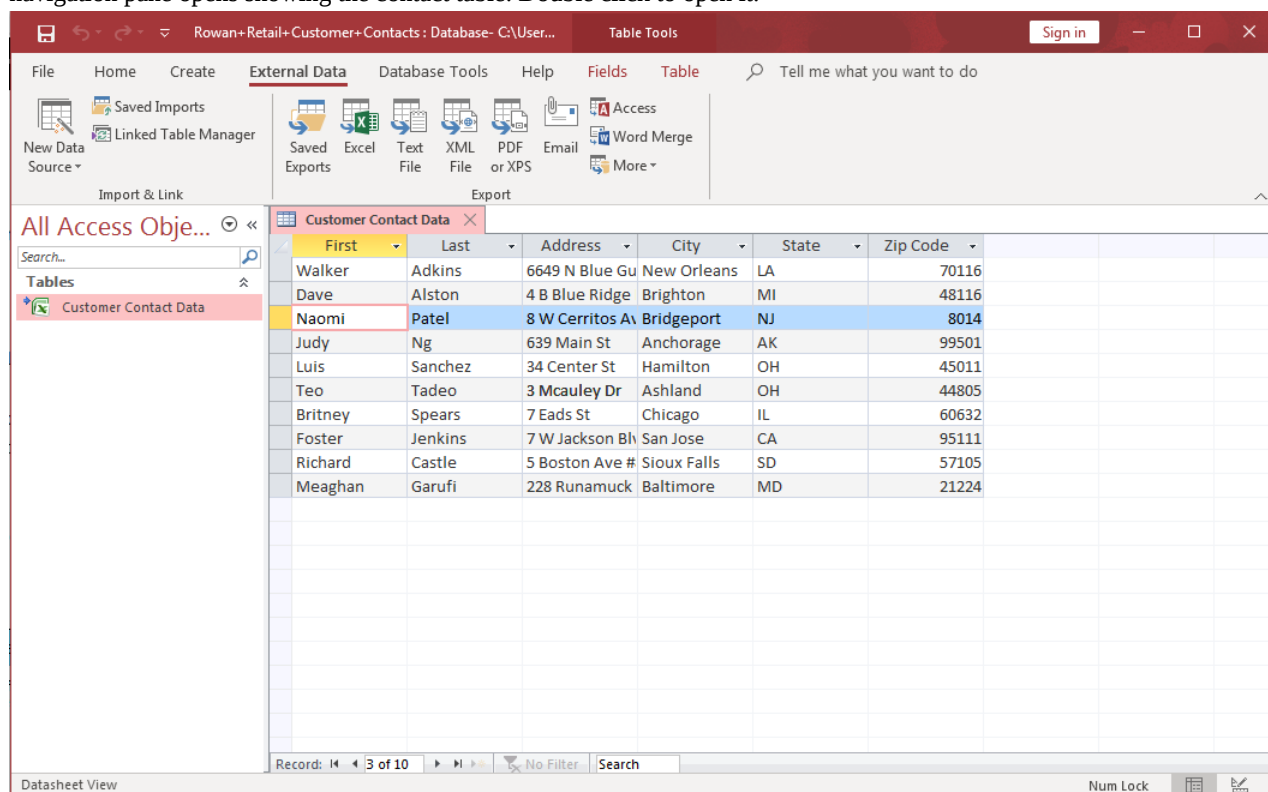
- Create Word mail merge file from Access Data

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

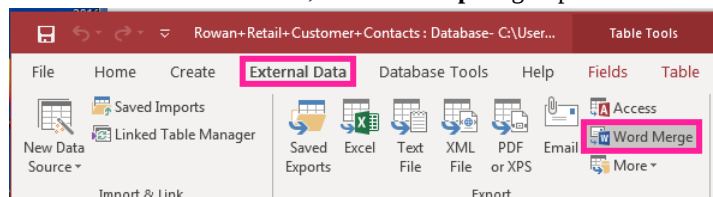
<https://assessments.lumenlearning.co...essments/18794>

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.

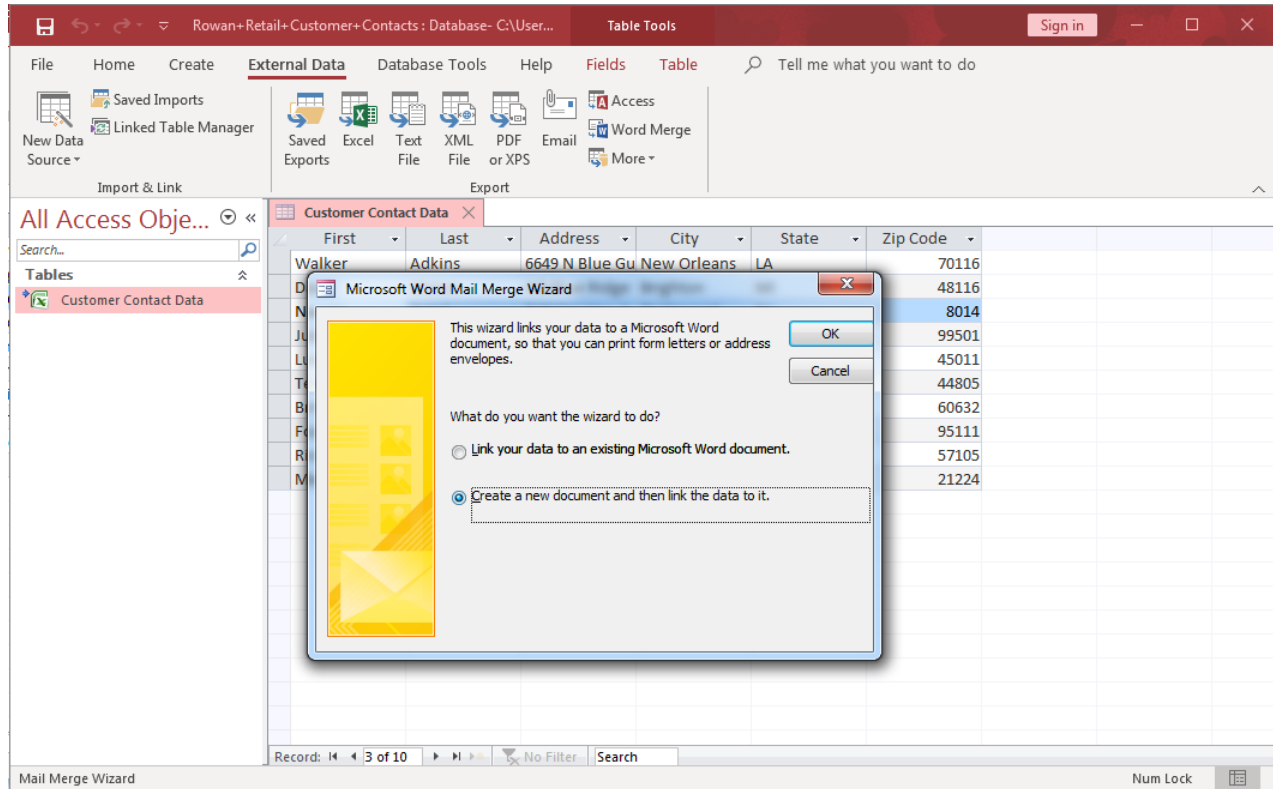


| First | Last | Address | City | State | Zip Code |
|---------|---------|-----------------|-------------|-------|----------|
| Walker | Adkins | 6649 N Blue Gu | New Orleans | LA | 70116 |
| Dave | Alston | 4 B Blue Ridge | Brighton | MI | 48116 |
| Naomi | Patel | 8 W Cerritos Av | Bridgeport | NJ | 8014 |
| Judy | Ng | 639 Main St | Anchorage | AK | 99501 |
| Luis | Sanchez | 34 Center St | Hamilton | OH | 45011 |
| Teo | Tadeo | 3 Mcauley Dr | Ashland | OH | 44805 |
| Britney | Spears | 7 Eads St | Chicago | IL | 60632 |
| Foster | Jenkins | 7 W Jackson Bl | San Jose | CA | 95111 |
| Richard | Castle | 5 Boston Ave # | Sioux Falls | SD | 57105 |
| Meaghan | Garufi | 228 Runamuck | Baltimore | MD | 21224 |

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.

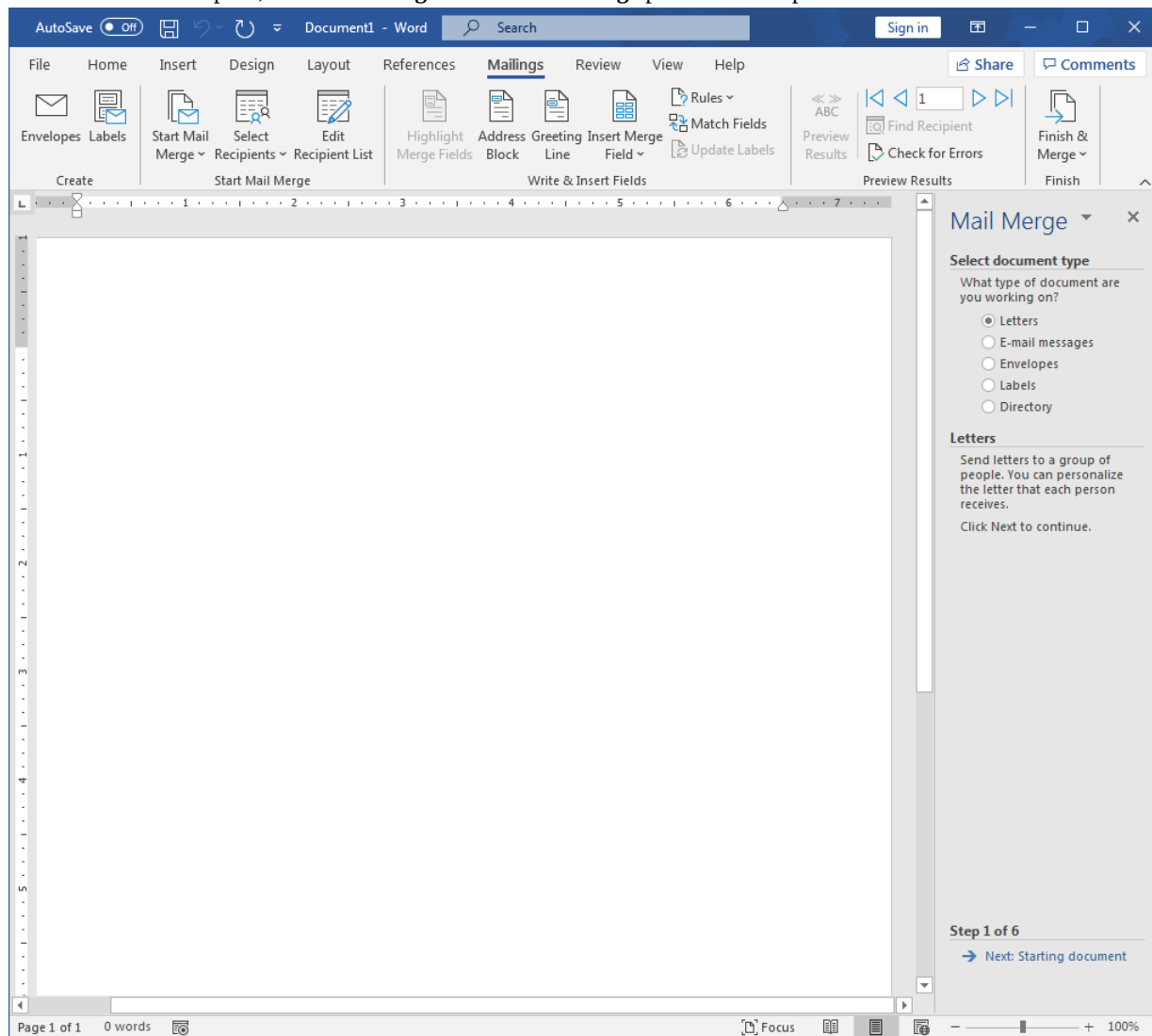


5. A Word Mail Merge Wizard window then opens.

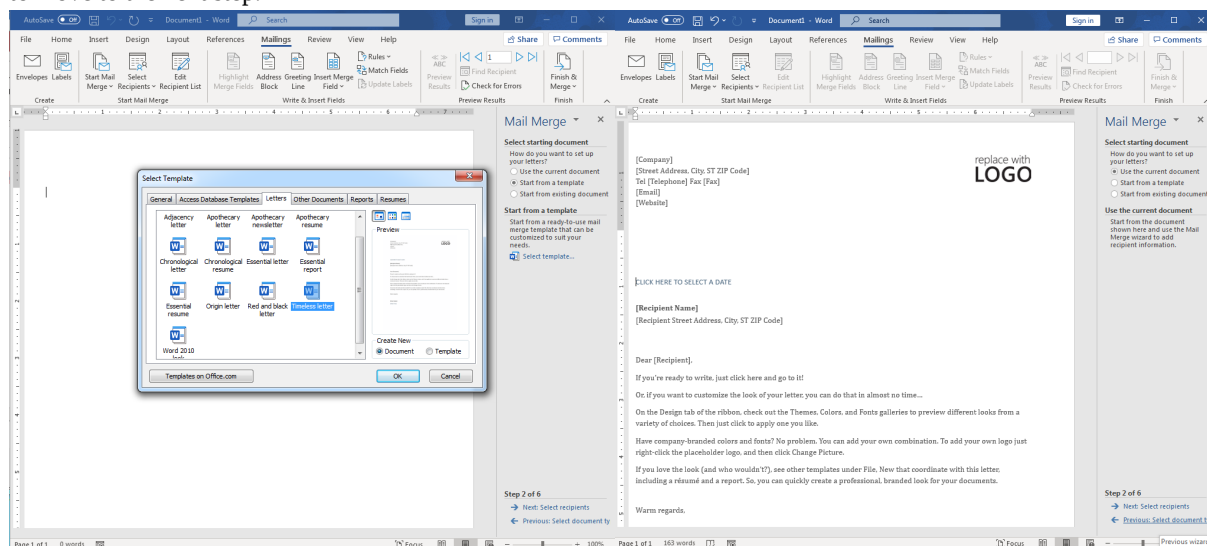


6. Decide if the wizard should like the address data into a new blank Word document or into an existing document. Select the option and click **OK**. For this example, we'll create a new document.

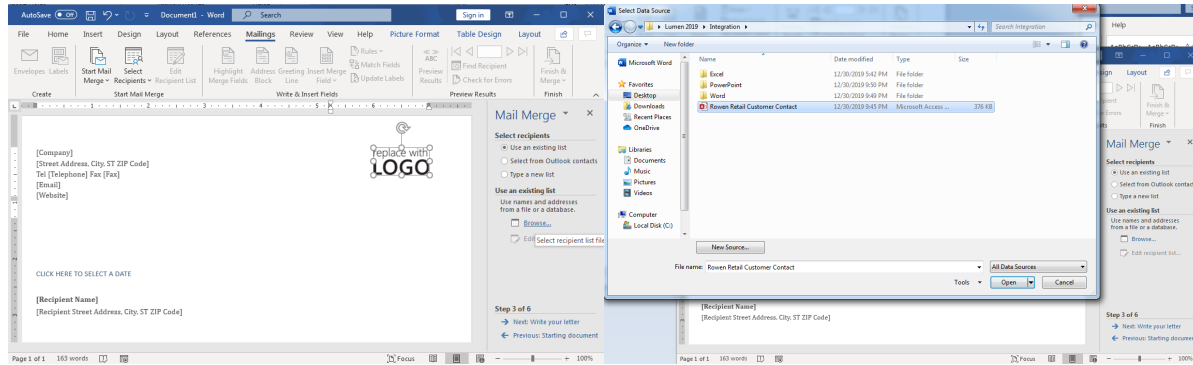
7. A Word documents opens, and the **Mailings** tab and **Mail Merge** pane are now open.



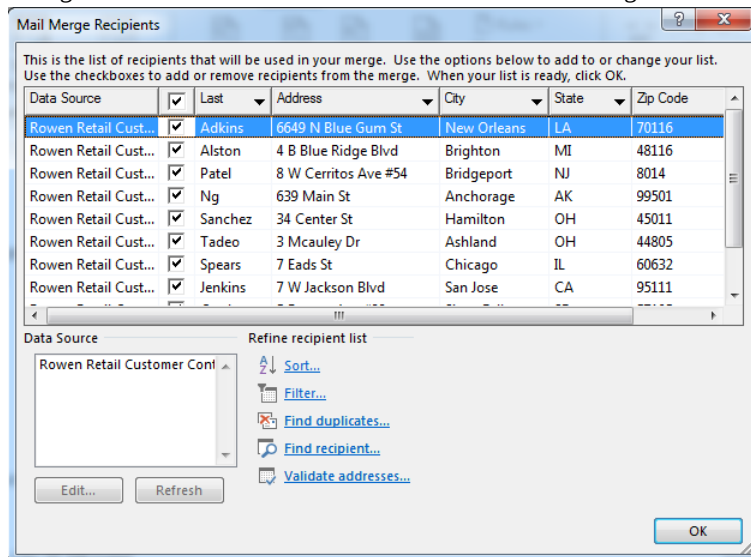
8. In the mail merge pane at the bottom are the wizard steps to walk through using the Next or Previous links. In Step 2 you can choose to compose your own letter or to pick from various templates. We'll choose a template and then update it. Click the link to move to the next step.



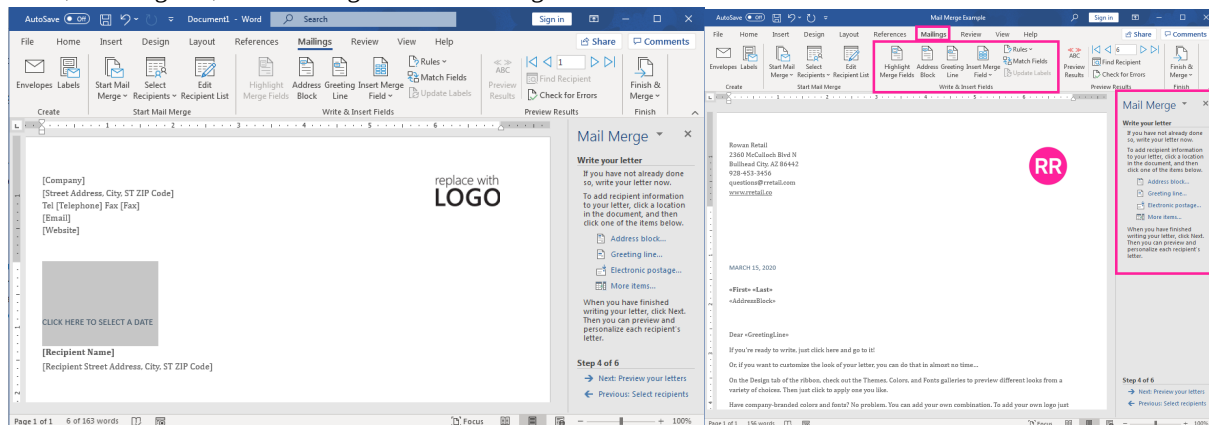
9. In Step 3, select the Access contact file. Select the **Browse** link under **Use an existing list** area and select the Access file.



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.

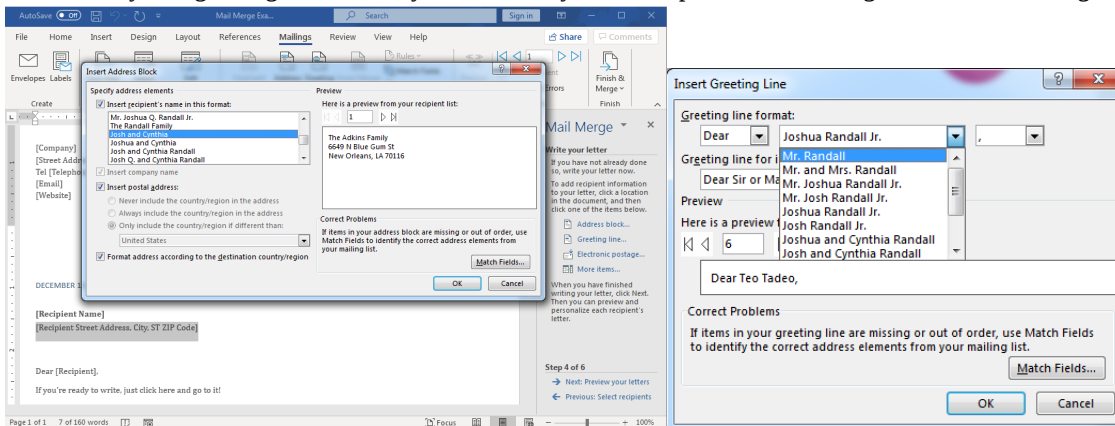


11. Now is the time to in the Word document to edit the letter, select the area for the address data to appear and select the Address block, Greeting line, etc. in the right side Mail Merge wizard menu and it inserts the Access data into the document.



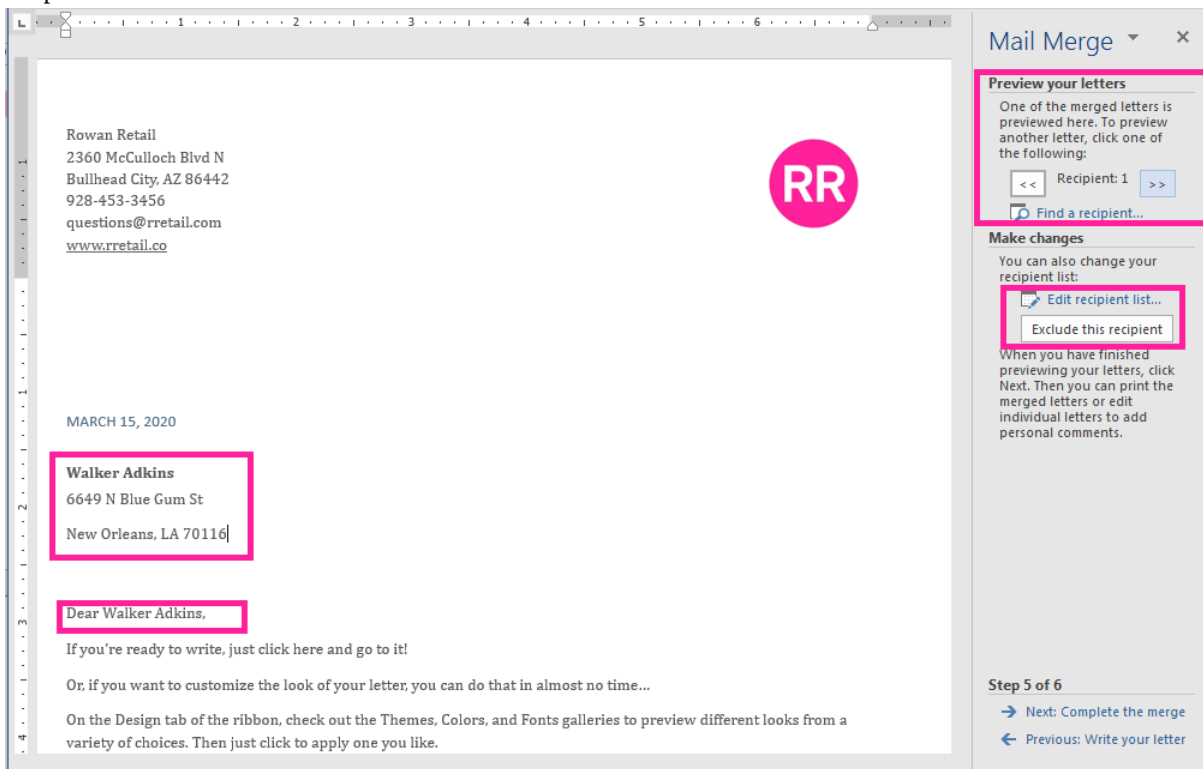
a. Besides using the Wizard, you can format each merging area from the Mailings tab, Write & Insert Fields group in the ribbon.

b. Select the style of greeting, the formality or informality or other options in the dialog boxes for each merge field.



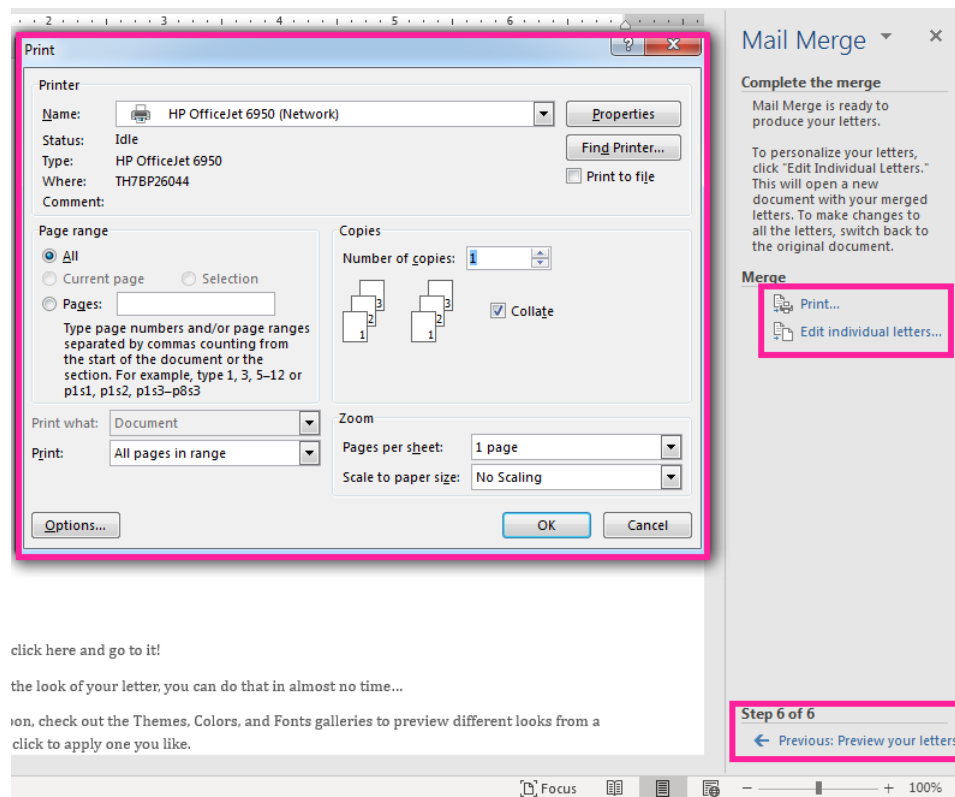
12. The wizard's step 5 allows you to preview the merged data in the document before you print it. Even in this stage you may have forgotten to add a space between the first and last name, too much space in the address field, or other errors. Now is the time to correct them.

- Use the **Preview your letters** area to arrow through the recipients and double check for errors.
- 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 Print 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.



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

<https://assessments.lumenlearning.com/assessments/18795>

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.

A link to an interactive elements can be found at the bottom of this page.

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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