Demonstrating some Database principles, using Word and Excel.

The Birthday loot:

Barney gave me a toaster, cost $10 from HEB

Betty gave me a DVR, cost $50 from Target, and

Wilma gave me a car, cost $50,000 from Central Texas BMW.

I need to write some thank you notes, but I would like to be able to re-task this information for later.
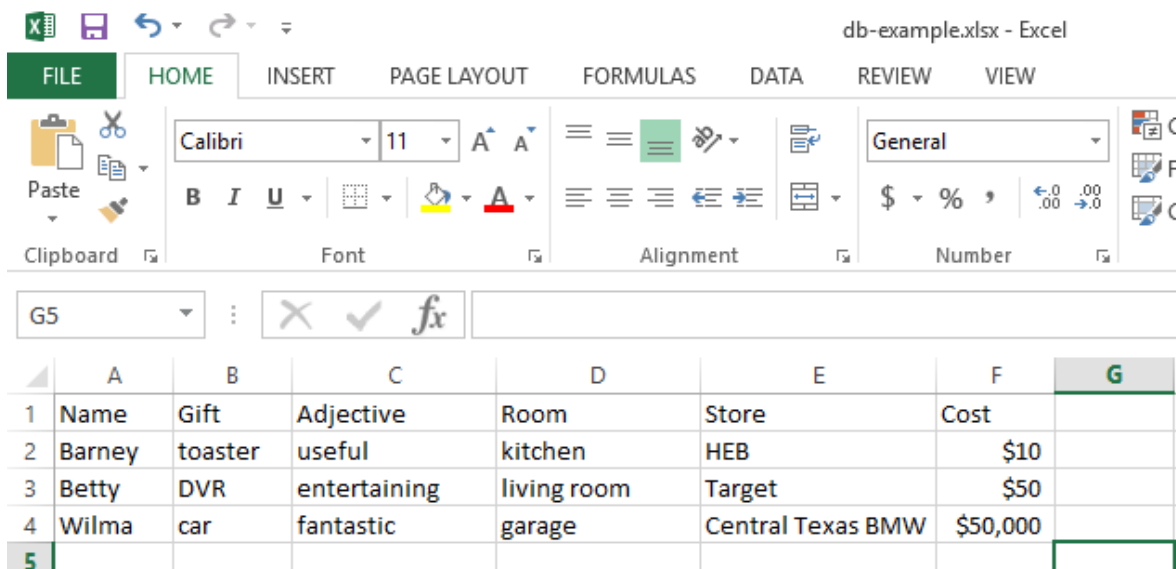
Option 1, great at thank you notes: I might enter the info to a word processing mail merge where info would be kept in a table

Option 2, actually create a Database, using Access.

For this demonstration, I'll use Option 1.

I won't be able to do much more with the data than thank you notes, but it will demo some important concepts. I'll redo this later in Access.

Mindful of what I might want to write in my thank you note, I create an Excel spreadsheet to hold the data
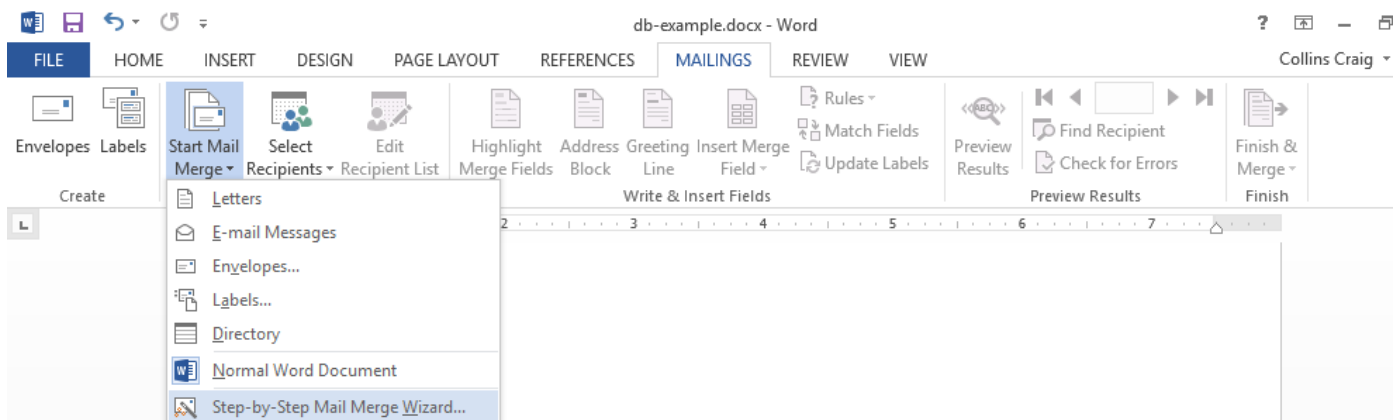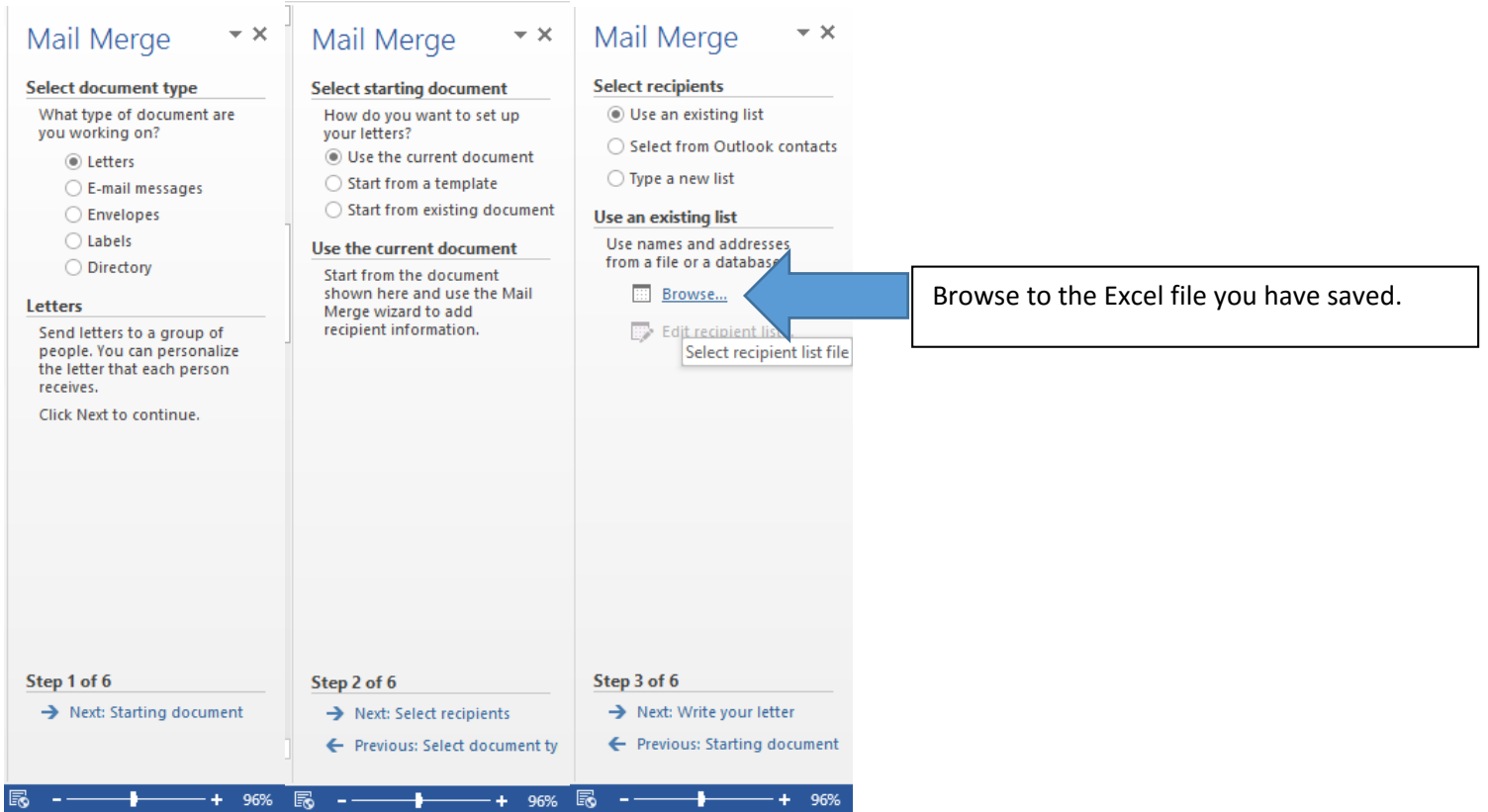

Note, the first row is column headings that describe the data I will be adding.

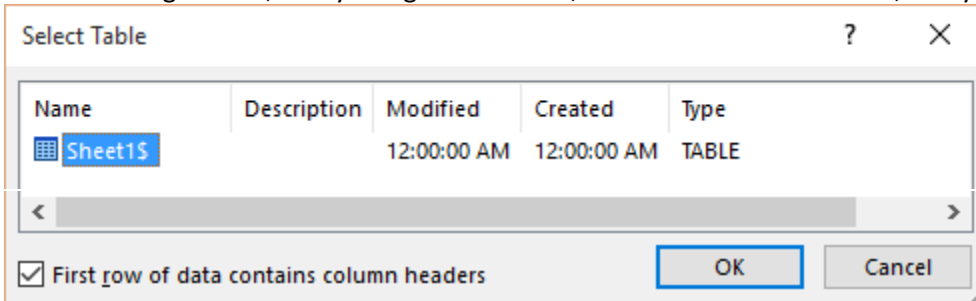Row 2 is the first record, info on what Barney gave me; Row 3 is info on what Betty gave me, etc.

Now I start Word, and open Mailings, to start a Mail Merge, using a Wizard.
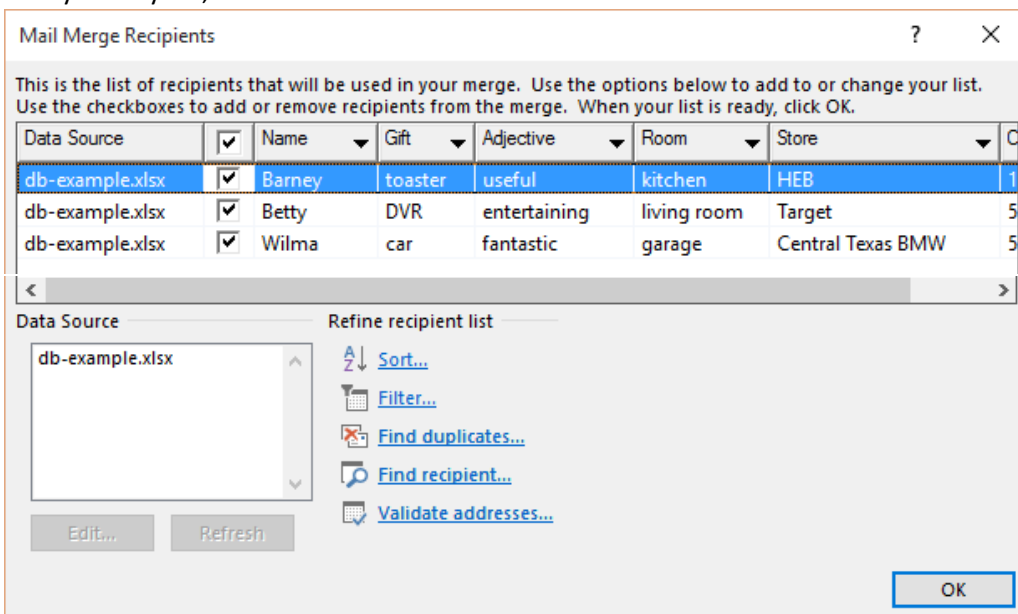
The wizard prompts me, and I make the following selections

Mail Merge ▾ ✕

Select document type

What type of document are you working on?

- ◉ Letters
- ○ E-mail messages
- ○ Envelopes
- ○ Labels
- ○ Directory

Letters

Send letters to a group of people. You can personalize the letter that each person receives.

Click Next to continue.

Step 1 of 6

→ Next: Starting document

Mail Merge ▾ ✕

Select starting document

How do you want to set up your letters?

- ◉ Use the current document
- ○ Start from a template
- ○ Start from existing document

Use the current document

Start from the document shown here and use the Mail Merge wizard to add recipient information.

Step 2 of 6

→ Next: Select recipients

← Previous: Select document ty

Mail Merge ▾ ✕

Select recipients

- ◉ Use an existing list
- ○ Select from Outlook contacts
- ○ Type a new list

Use an existing list

Use names and addresses from a file or a database.

🔲 Browse...

📝 Edit recipient lis

Select recipient list file

Step 3 of 6

→ Next: Write your letter

← Previous: Starting document

Browse to the Excel file you have saved.

After selecting the file, verify using the 1st sheet, the one with the data in it, and yes… the first row was Column headers.

Select Table ? ✕

Name	Description	Modified	Created	Type
▦ Sheet1$		12:00:00 AM	12:00:00 AM	TABLE

☑ First row of data contains column headers   OK   Cancel

Verify the layout, and select OK

Mail Merge Recipients ? ✕

This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

Data Source	☑	Name ▾	Gift ▾	Adjective ▾	Room ▾	Store ▾	C
db-example.xlsx	☑	Barney	toaster	useful	kitchen	HEB	1
db-example.xlsx	☑	Betty	DVR	entertaining	living room	Target	5
db-example.xlsx	☑	Wilma	car	fantastic	garage	Central Texas BMW	5

Data Source

db-example.xlsx

Refine recipient list

- ↓ Sort...
- Filter...
- Find duplicates...
- Find recipient...
- Validate addresses...

Edit...   Refresh

OK

Now it is time to write our letter.

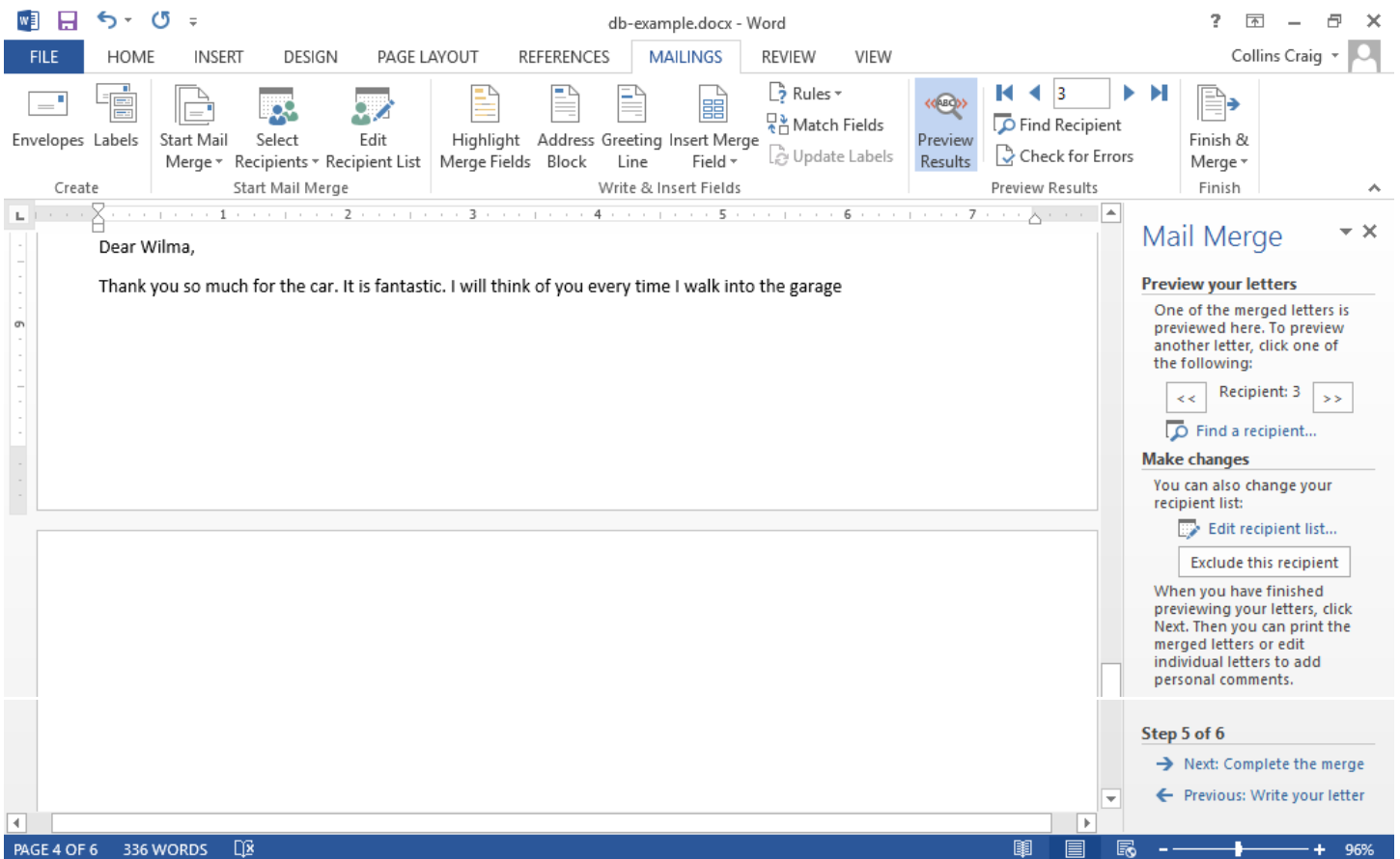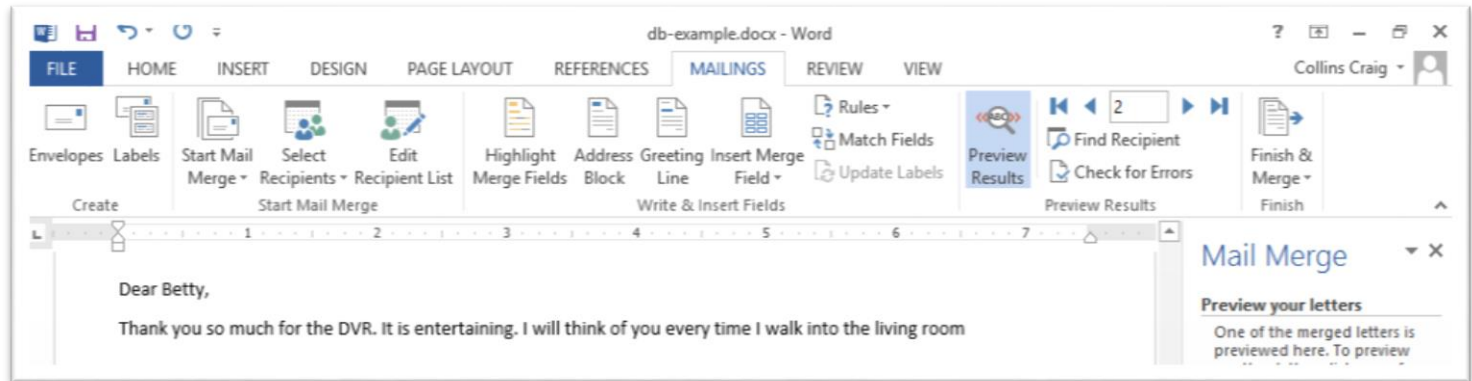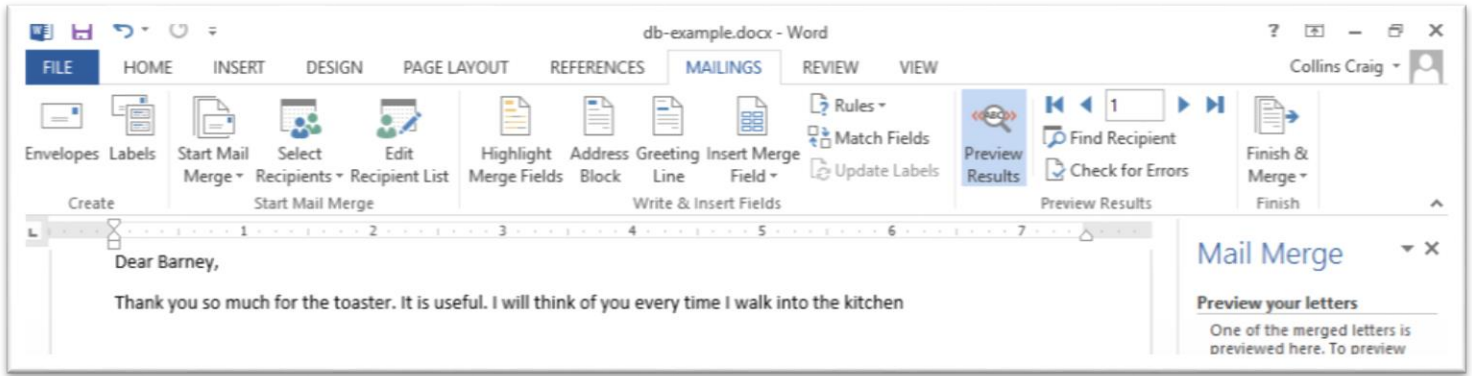When I get to the place for the name, I use Insert Merge Field, on the Mailings tab, and select the item I need.

I repeat inserting the fields until I have the following

Dear «Name»,

Thank you so much for the «Gift». It is «Adjective». I will think of you every time I walk into the «Room»

Now I select Next: Preview your letters. I can use the arrows to review all the letters

Now I can select Next: to Complete the merge, and print.

I could even reuse the data, and write letters to the store… to ask to return the gifts!

But, I don't want to return that car… that is when a real database would be handy, to sort all that data.