

Mail merging is typically used to send the same document to many of people. Word will merge the document with the names and addresses of the recipients, which are stored in a separate file called a **data source**.

Mail merge is perfect for bulk mailing, sending out invitations, creating personalised letters, labels, price lists, special offers, in fact, wherever there is a need to send the same document to many people.

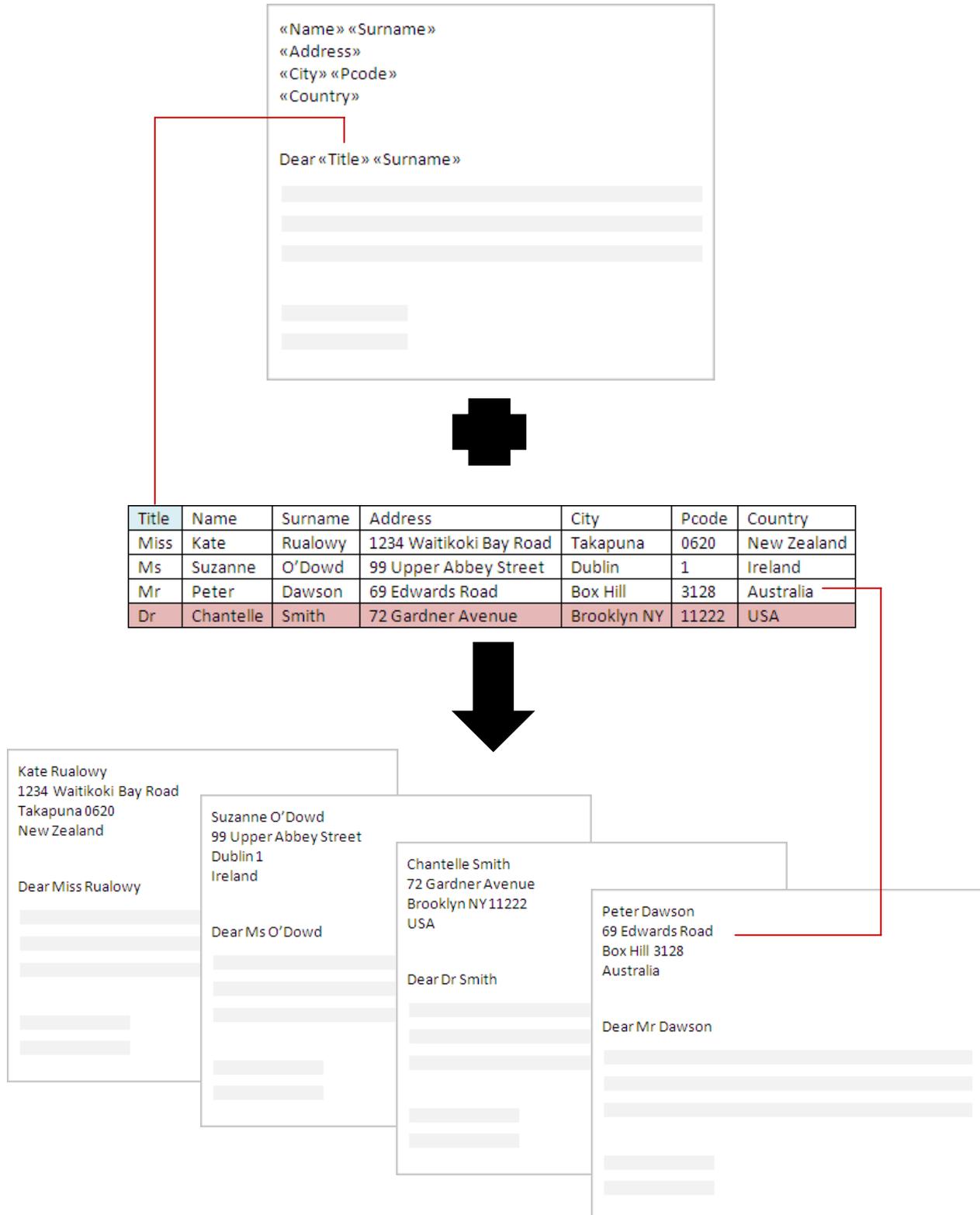
In this session you will:

- ✓ gain an understanding of the mail merge process
- ✓ gain an understanding of mail merge terminology
- ✓ gain an understanding of the steps involved in the **Mail Merge Wizard**
- ✓ learn how to select the starting document
- ✓ learn how to attach a data source to the starting document
- ✓ learn how to insert merge fields and finalise the document
- ✓ learn how to preview merged documents
- ✓ learn how to complete a mail merge.

UNDERSTANDING MAIL MERGING

You use **mail merge** to send or distribute the same document to many people. When you create a mail merge document, you insert **fields** that tell Word where to insert the recipient's data

and the type of data to be inserted (such as the **Name** field). Recipient data is stored in a separate file called a **data source** that contains these fields as headings. This process is shown below.



UNDERSTANDING MAIL MERGE TERMINOLOGY

As you work with mail merge in Word, you will most likely come across all sorts of terminology that possibly won't mean much to you unless you have used mail merge in the past. This page

explains the terminology that you will most likely encounter when creating mail merge documents in Word.

Term	Description
Starting document	The starting document , also known as the main document , contains the content of your document. The starting document will also contain mail merge fields . To merge the recipient data into the starting document, you must connect it to a data source file .
Data source file	The data source file is a separate file that contains the recipient's information, such as the names and addresses of the people who will receive the correspondence. This data must be stored in a table or database, where each row represents an individual record of information and each column shows the same type of information (such as First Name). The data source must be linked to the main document for the merge to be successful. During the merge process, Word will generate one copy of the main document for each row (record) in the data source file. The data source must be in a tabular format, with rows and columns, such as in a table in a Word document, Outlook address book, Access database or an Excel spreadsheet.
Mail merge field	When you set up the main document, you need to insert mail merge fields into the areas of the document where you want the recipient data to be inserted. So, for example, if you want to include a salutation in a letter, you will insert the Salutation field beside Dear in the starting line. When the merge is run, Word will look at all the records contained in the column heading Salutation of the data source to identify what information needs to be merged into the letter. The mail merge fields in Word correspond to the column headings in the data source file. Mail merge fields appear surrounded by chevrons (<< >>) – for example, Dear <<Name>>. These chevrons will not appear in the merged documents; they just help you to distinguish the fields in the main document from the regular text.
<<AddressBlock>>	Word has provided the Address Block to make it quicker and easier for you to insert addresses. <<AddressBlock>> is a combination of several fields, including first name, last name, street address, city and post code. You can customise the content in this composite field – for example, you can have the Country included if the address is for a non-Australian country.
<<GreetingLine>>	<<GreetingLine>> can include one or more name fields, depending on your chosen salutation – for example, Dear <<Name>> <<Surname>>. You can customise the content in this composite field.
Form letter	A form letter is the end result, that is, the records (recipients) in the data source have been merged with the main document to produce a form letter for each record. Form letters can be printed directly or the records can be merged into a new document, and individual form letters can be edited if required.
Recipients	The recipients are the individual records (or rows) listed in the data source file whose data will be merged into the main document . For example, the recipients will be the people who will receive a form letter, or they will be the list of items that will be included in a product catalogue, and so on.
Mail Merge task pane	You can perform a mail merge very simply using the Mail Merge task pane. When you display this task pane, it starts the Mail Merge Wizard which leads you step-by-step through the mail merge process.

THE MAIL MERGE WIZARD PROCESS

The easiest way to perform a mail merge in Word is to use the **Mail Merge Wizard**. This Wizard will take you through the process step-by-step, ensuring that you complete each step before you

can move onto the next step. Below is a description of each step and the tasks you'll need to perform to complete a mail merge.

1 Select the Type of Document

The first step in the merging process involves choosing the type of documents that you want to create. For instance, you can:

- send letters or email messages to a group of people
- print addressed envelopes or labels for a group mailing
- create and print a single document comprising a catalogue (such as the name and description of products) or a directory of addresses.

2 Select the Starting Document

The **starting document** (also known as the **main document**) contains the content of the document. The starting document can be an existing document that you can open before you start the merge, the document that is currently open in Word, or you can create a new document from one of the installed mail merge templates.

3 Select the Recipients

The next step in the process is to connect the main document to the **data source file**. The data source file is a file that contains the information that will replace the mail merge fields in the main document, such as the names and addresses of the recipients of a form letter. You can use an existing list (such as a file or database), use your Outlook contacts list, or create a new recipients list during this step of the merge process.

4 Write the Letter

After you have connected the **main document** to the **data source file**, you are ready to type or modify the text of the document. To be able to merge this document with the data source file, you must click in the document at the desired location and select the required mail merge field. Data from the data source file will appear at that location in every copy of the merged document.

To make it easier for you to write business letters, Word has included the combination fields **<<AddressBlock>>** and **<<GreetingLine>>** which allow you to quickly insert the various fields that make up an address (such as Name, Address, City, Post Code and so on) and greeting line (such as Dear Title Surname).

If you used one of the installed mail merge templates to create the starting document, these combination mail merge fields will be included in the document by default.

5 Preview the Merged Documents

A preview of the main document for **Recipient 1** will appear. All mail merge fields will have been replaced by the corresponding data from the first row of the data source file. When you preview **Recipient 2**, you will see that information from the second row in the data source file has replaced the mail merge fields to create the second document, and so on.

It is very important to thoroughly check the documents for errors before printing all of the merged records. If you see anything that you want to change – such as a spelling mistake in the main text, missing data or unexpected results – change the document at this step and the changes will flow through to all of the merged documents.

6 Complete the Merge

At this stage you can personalise any of the merged documents by saving them as a new document and editing them as desired, you can print all or some of the merged documents, or you can email the messages.

SELECTING THE STARTING DOCUMENT

During the first step of the mail merge process you will produce the starting (main) document, such as inserting or editing text, formatting, page layout and the like. You can create a document

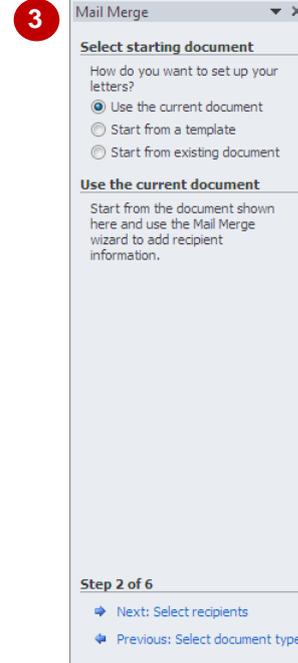
from scratch or base it on one of the available Word **merge letter** templates. You can also use an existing document, which you will do in this exercise.

Try This Yourself:

Open
File

Before starting this exercise you must open the file *W823 Mail Merging_1.docx...*

- 1 Click on the **Mailings** tab on the ribbon, then click on **Start Mail Merge**  in the **Start Mail Merge** group to display a list of options
- 2 Select **Step by Step Mail Merge Wizard** to display **Step 1 of 6** of the **Mail Merge Wizard** in the **Mail Merge** task pane
- 3 Ensure that **Letters** is selected under **Select document type**, then click on **Next: Starting document** to display **Step 2 of 6** in the **Mail Merge** task pane
- 4 Click on **Next: Select recipients** to display the third step of the **Wizard**



For Your Reference...

To **select** the **starting document**:

1. Click on the **Mailings** tab, then click on **Start Mail Merge**  and select **Step by Step Mail Merge Wizard**
2. Select the **document type** and click on **Next**, then select the **starting document**

Handy to Know...

- Word includes several **merge letter templates** that you can use as your main document and already include the necessary fields. All that you need to do is type in the text! At step 2, select **Start from a template**. Click on the **Letters** tab, select a **merge letter** template and click on **[OK]**.

SELECTING A RECIPIENT LIST

Recipient data, such as names and addresses, must be stored in a separate file in a **tabular** format with columns and rows, such as an Excel spreadsheet, Access database or a table in a

Word document. This data file, or **data source**, must be linked to the starting document so that Word knows what **fields** (headings) are available, as well as where the merge data is stored.

Try This Yourself:

Same File

Continue using the previous file with this exercise and ensure that you are at step 3 of the Mail Merge wizard...

1 Ensure that **Use an existing list** is selected under **Select recipients**

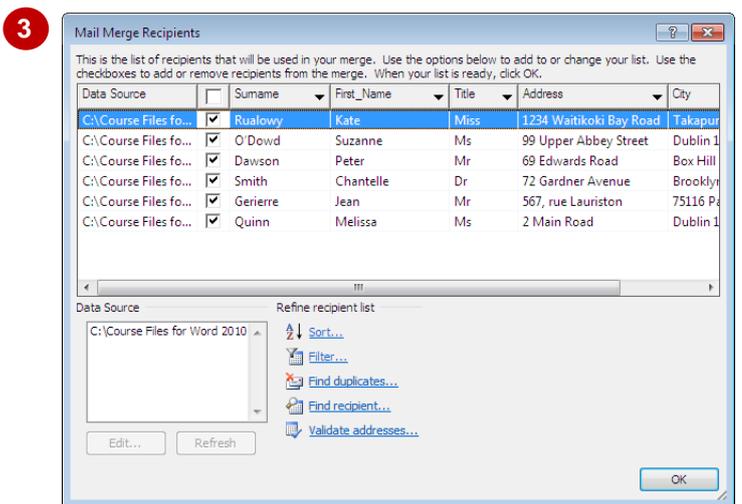
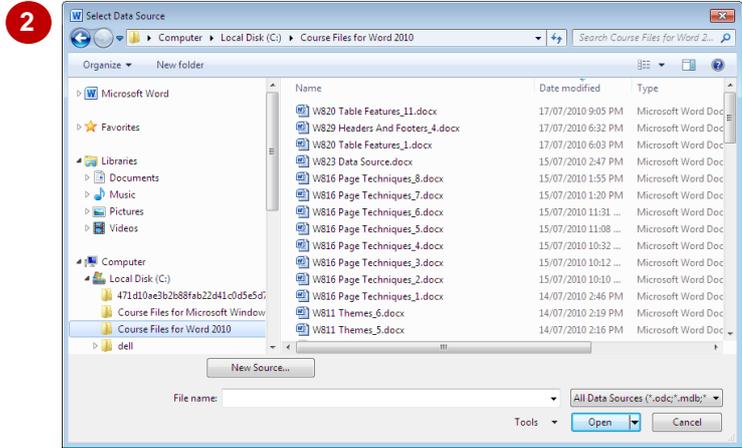
2 Click on **Browse** to open the **Select Data Source** dialog box, then navigate to the course files folder

3 Scroll down to and click on **W823 Data Source.docx**, then click on **[Open]** to open the **Mail Merge Recipients** dialog box

Let's create a letter for all of the recipients, in the order as shown: *Kate through to Melissa*. We don't need to alter anything in this dialog box...

4 Click on **[OK]** to select the data source, then click on **Next: Write your letter**

5 Save the document



For Your Reference...

To **select recipients**:

1. At step **3** of the **Wizard**, ensure that **Use an existing list** is selected
2. Click on **Browse** and navigate to the folder containing the data source
3. Double-click on the data source file and then click on **[OK]**

Handy to Know...

- To remove individual records (recipients) from the recipient list, click on **Edit recipient list** in the **Mail Merge** task pane at step **3** to display the **Mail Merge Recipients** dialog box. Click on the check mark beside their name so that it appears without a tick. Click on **[OK]**.

INSERTING MAIL MERGE FIELDS

At step **4** of the **Mail Merge** wizard you will finalise the document, including inserting or editing text, formatting, page layout and the like. You will also insert **fields** into the document that

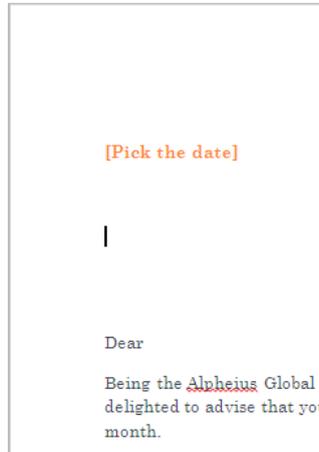
tell Word where to insert the recipient data. This will become the final version of the starting document. Here you will insert **combination** fields that simplify the process of inserting fields into a document.

Try This Yourself:

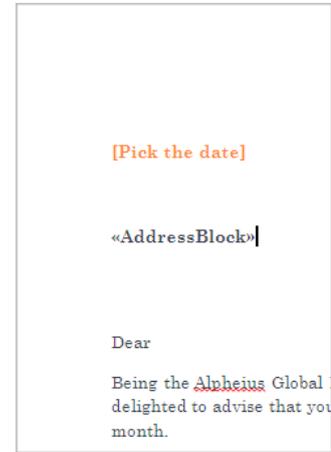
Same
File

Continue using the previous file with this exercise, and ensure that you are at step 4 of the Mail Merge wizard...

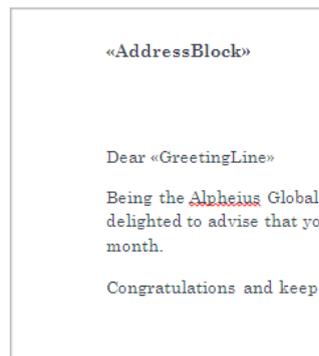
- 1 Click to position the insertion point as shown
- 2 Click on **Address block** in the **Mail Merge** task pane to display the **Insert Address Block** dialog box
Word suggests a format and displays a preview ...
- 3 Click on **[OK]**
The AddressBlock merge field is inserted into the document. This field is a combination field of the address fields in your data source...
- 4 Click in the word **Dear** and press **[End]**, then click on **Greeting Line** in the **Mail Merge** task pane to display the **Insert Greeting Line** dialog box
- 5 Click on the drop arrow for **Dear** and select **(none)**, leave the other settings as they are then click on **[OK]**
- 6 Type your name in the **[YourName]** placeholder
- 7 Click on **[Pick the date]**, then click on the drop arrow and click on **[Today]** to insert today's date
- 8 Click on **Next: Preview your letters** to display step 5 of the wizard



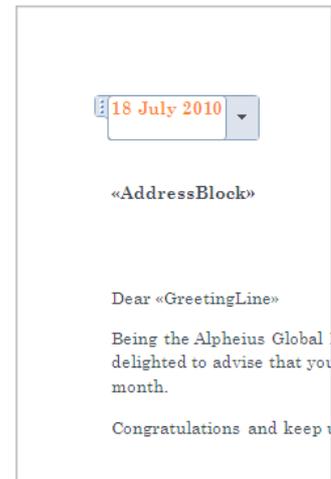
1



3



5



7

For Your Reference...

To **insert merge fields** into a document:

1. Proceed to step **4** of the **Mail Merge** wizard
2. Position the insertion point for the address, click on **Address block** and click on **[OK]**
3. Position the insertion point for the greeting line, click on **Greeting line**, adjust the settings as required and click on **[OK]**

Handy to Know...

- To insert fields into the document manually, position the cursor and click on **More items** in the **Mail Merge** task pane. Click on a field and click on **[Insert]** and then click on **[Close]**. Press **[Space]** or reposition the cursor and repeat the above as required to insert each field.

PREVIEWING THE MERGED DOCUMENTS

At step **5** of the **Mail Merge** wizard you can preview the merged documents to see how they will appear when printed or distributed. At this step you can ensure that the merge process has

worked correctly, and if necessary, go back and make any final adjustments to the formatting and page layout, for example. You can also select recipients to exclude from the merge.

Try This Yourself:

Same
File

Continue using the previous file with this exercise, and ensure that you are at step 6 of the Mail Merge wizard...

- 1 Click on **Next Record** >> in the **Mail Merge** task pane to preview the merged document for each recipient

We will remove the bold formatting from the address block...

- 2 Click on **Previous: Write your letter** to return to step 4 of the wizard

- 3 Select «**AddressBlock**», click on the **Home** tab and click on **B** to turn bold off

Let's exclude Recipient 6...

- 4 Click on **Next: Preview your letters** to return to the preview of the merged documents

- 5 Click on **Next Record** >> and **Previous Record** << until **Recipient 6 – Melissa Quinn's** letter is displayed, then click on **[Exclude this recipient]**

Melissa Quinn is no longer a recipient...

- 6 Click on **Next: Complete the merge** to display the final step of the mail merge process

1

18 July 2010

Miss Kate Rualowy
1234 Waitikoki Bay Road
Takapuna New Zealand

Dear Miss Rualowy,

Being the Alpheius Global Enterprise's Employee of the Year in your region, we are delighted to advise that your salary will increase by 10% from the first pay period of next month.

Congratulations and keep up the great work!

3

18 July 2010

«AddressBlock»

Dear «GreetingLine»

5

18 July 2010

Ms Melissa Quinn
2 Main Road
Dublin 1 Ireland

Dear Ms Quinn,

Being the Alpheius Global Enterprise's Employee of the Year in your region, we are delighted to advise that your salary will increase by 10% from the first pay period of next month.

Congratulations and keep up the great work!

For Your Reference...

To **preview merged documents**:

1. Proceed to step **5** of the **Mail Merge** wizard
2. Click on **Next Record** >> and **Previous Record** << to preview the merged document for each recipient

Handy to Know...

- To include a recipient in the mail merge, go to **Step 5: Preview your letters** of the **Mail Merge** wizard and click on **Edit recipient list** to open the **Mail Merge Recipients** dialog box. Find the recipient and click the check box that appears beside their name so that it appears with a tick. Click on **[OK]**.

COMPLETING THE MERGE

At the final step of the **Mail Merge** wizard, **Completing the merge**, Word will merge the records (recipients) with the main document and create a **form letter** for each record. At this step

you need to choose whether to merge the records directly to the printer and print the form letters, or merge the records into a new document to save or edit. Here you will save the form letters.

Try This Yourself:

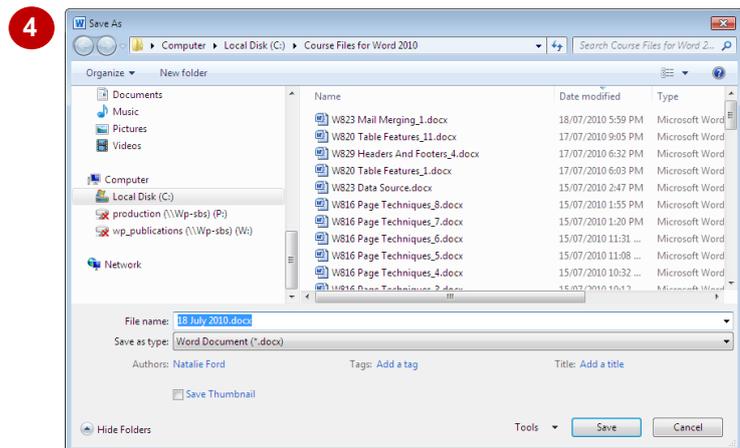
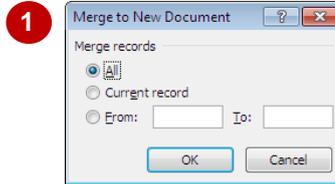
Same
File

Continue using the previous file with this exercise, and ensure that you are at step 6 of the Mail Merge wizard...

- 1 Click on **Edit individual letters** under **Merge** to open the **Merge to New Document** dialog box

Let's save all of the merged letters as a new document...

- 2 Ensure that **All** is selected under **Merge records**, then click on **[OK]** to create a new document called **Letters1**
- 3 Scroll through the document
Each form letter is separated by a page break and so appears on a separate page...
- 4 Click on the **File** tab, then click on **Save As** to open the **Save As** dialog box, then navigate to the course files folder
- 5 Type **My Merged Letters** in **File name**, then click on **[Save]**
- 6 Close the document
- 7 Save and close the main document



For Your Reference...

To **merge** the **records**:

1. Proceed to step 6 of the **Mail Merge** wizard and then:
 - Click on **Edit individual letters** to edit and save, or
 - Click on **Print** to print the form letters

Handy to Know...

- If you select to **Print** the merged records, the form letters will be sent directly to the printer. Although this does save time when completing mail outs and the like, you cannot edit the form letters before printing.

