

CHAPTER 3

InFocus

MAIL MERGE TECHNIQUES

Word allows you to customise your mail merges by **filtering** and **sorting** recipients, as well as creating and applying **rules** that instruct Word what data to insert in specific fields when certain conditions have been met. If you spend a lot of time preparing and processing mail outs and the like, then these features could prove a valuable time-saver.

In this session you will:

- ✓ learn how to run a saved merge
- ✓ learn how to exclude recipients from a mail merge
- ✓ learn how to filter recipients
- ✓ learn how to sort recipient records
- ✓ learn how select another data source
- ✓ learn how to apply an **If...Then...Else** rule
- ✓ learn how to apply a **Fill-In** rule.

RUNNING A SAVED MERGE

When you create a mail merge document and have linked the data source to the main document, you don't have to complete the merge process before closing the document. Instead,

you can save the main document, and Word will automatically retain the data source and field information. You can then resume the mail merge at a later date as required.

Try This Yourself:

Before starting this exercise ensure that Word is open...

- 1 Open the file **W827 Merging Techniques_1.docx** from the course files folder

Because this file is an existing merge document, you will be presented with a message box asking whether or not you want to have data placed in the document from the attached data source...

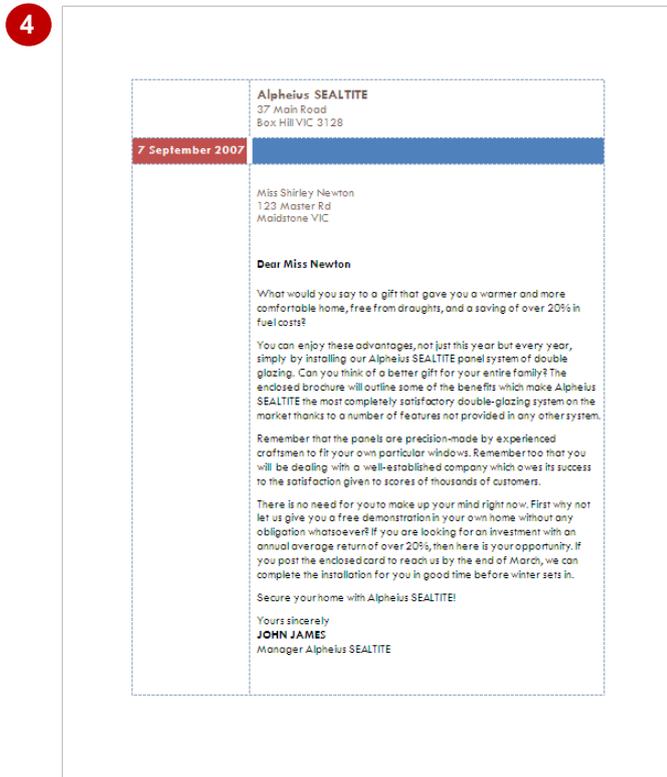
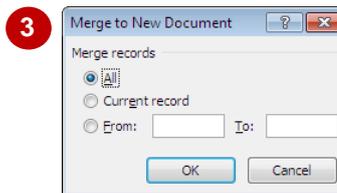
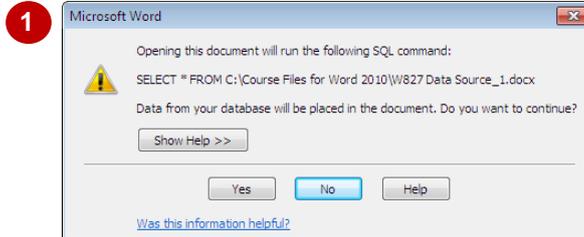
- 2 Click on **[Yes]** to open the merge document

Now, to complete the merge...

- 3 Click on the **Mailings** tab, then click on **Finish & Merge**  in the **Finish** group and select **Edit Individual Documents** to open the **Merge to New Document** dialog box

- 4 Ensure that **All** is selected, then click on **[OK]** to create the merge letters

- 5 Scroll through some of the letters (there should be 45 letters), then close the form letters without saving and leave the mail merge document open



For Your Reference...

To **run** a **saved merge**:

1. Open the merge main document
2. Click on **[Yes]** to place the data from the attached data source into the merge document
3. Click on **Finish & Merge**  on the **Mailings** tab

Handy to Know...

- If you click on **[No]** at the SQL command prompt when opening an existing merge document, the document will open without the data source attached. You cannot perform a merge unless you attach a data source, so make sure you attach another data source.

EXCLUDING RECIPIENTS

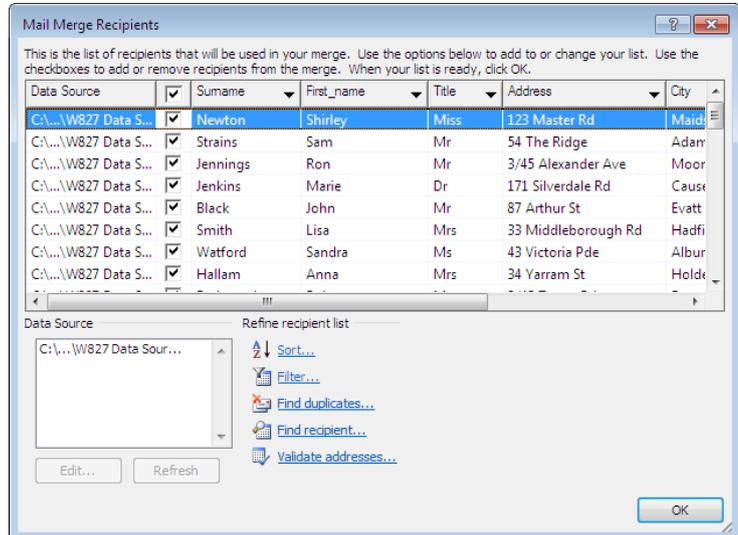
If you use the same data source to perform mail merges for various documents, you may find at times that you don't want a merge document to be sent to all of the recipients. Instead you can

select to **exclude** recipients from the mail merge. By default, all recipients are included in the mail merge, but you can easily exclude recipients in the **Mail Merge Recipients** dialog box.

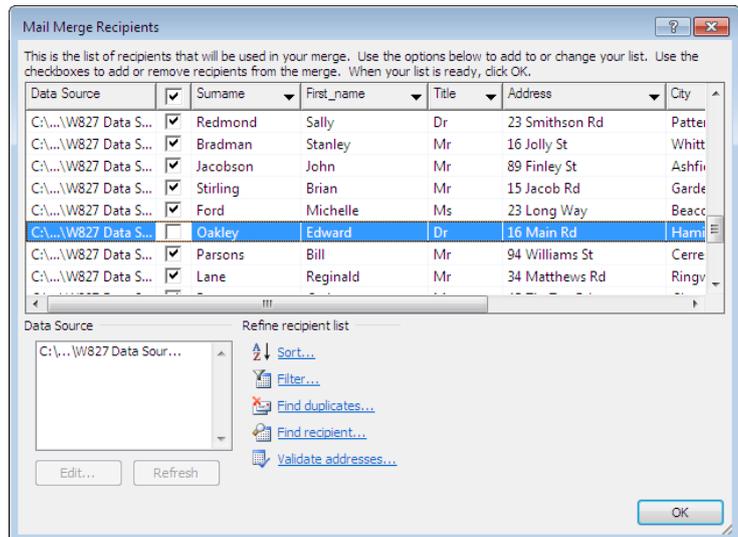
Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click on the **Mailings** tab, then click on **Edit Recipient List**  in the **Start Mail Merge** group to open the **Mail Merge Recipients** dialog box
A tick beside the recipient's name indicates they will be included in the mail merge...
- 2 Click on the check boxes to remove the tick for the following **Surnames**:
Jennings, Foreman, Billings, Marsh, Richardson, Young, Oakley
- 3 Click on [OK] to close the **Mail Merge Recipients** dialog box
- 4 Click on **Finish & Merge**  and select **Edit Individual Documents** to open the **Merge to New Document** dialog box
- 5 Ensure that **All** is selected, then click on [OK] to create the merge letters
In this case 'All' does not really mean all recipients; rather it means all selected recipients...
- 6 Scroll through some of the letters (there should be 38 letters), then close the form letters without saving



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For Your Reference...

To **select recipients**:

1. Click on **Edit Recipient List**  in the **Start Mail Merge** group on the **Mailings** tab
2. Remove the tick for the records that are not to be included in the merge
3. Click on [OK] then finish the merge

Handy to Know...

- If you want to **exclude** more recipients than you want to **include**, click on the tick in the **Header** row in the **Mail Merge Recipients** dialog box. This will remove all ticks, and then you can tick to select recipients to include, then click on [OK].

FILTERING RECIPIENTS

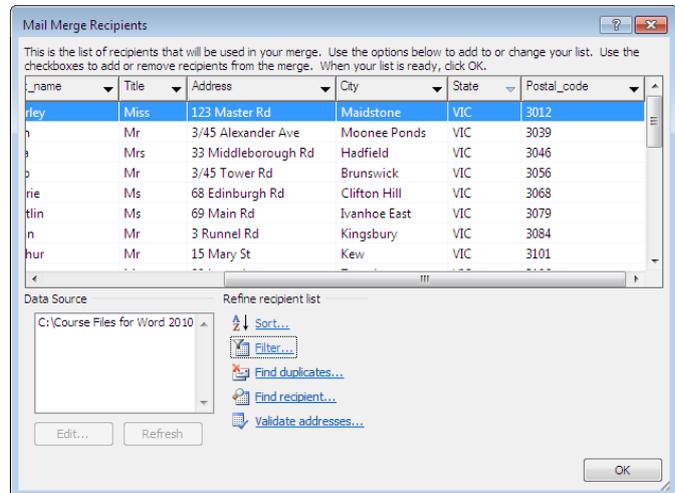
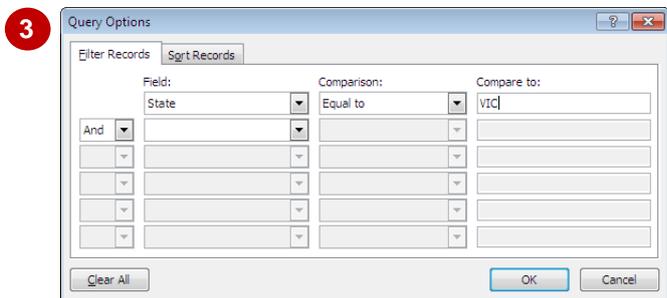
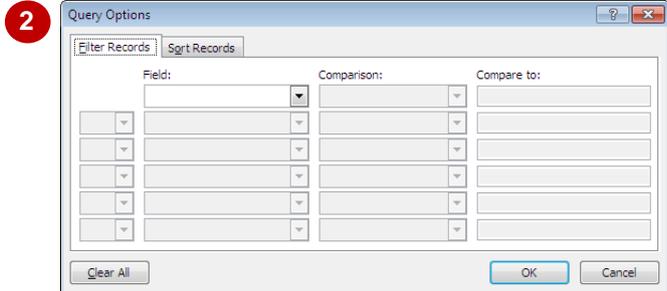
You can select recipients to include by applying a **filter**. A filter is a set of conditions that tells Word what recipients to include or exclude based on the **criteria** that you specify. For example, you

might tell Word that you only want to send the mail merge document to all recipients who live in Victoria or New South Wales. Filters are applied by creating a **query** that states the criteria.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click on the **Mailings** tab, then click on **Edit Recipient List**  to open the **Mail Merge Recipients** dialog box
- 2 Click on **Filter** to open the **Query Options** dialog box
- 3 Click on the drop arrow  for **Field** and select **State**, then type **VIC** in **Compare to**
- 4 Click on **[OK]** to close the **Query Options** dialog box, then scroll to the right so that you can see the **State** column
Only records for Victoria will appear...
- 5 Click on **[OK]** to close the **Mail Merge Recipients** dialog box
At this point you could complete the merge, but instead we will just preview the results...
- 6 Click on **Preview Results**  in the **Preview Results** group and then click on **Next Record**  to preview each letter
Now let's remove the filter...
- 7 Click on **Edit Recipient List**  in the **Start Mail Merge** group to open the **Mail Merge Recipients** dialog box, click on **Filter** then click on **[Clear All]**
- 8 Click on **[OK]** and then click on **[OK]**



For Your Reference...

To **filter recipients**:

1. Click on **Edit Recipient List** 
2. Click on **Filter**
3. Enter the desired conditions in **Field**, **Comparison** and **Compare to**
4. Click on **[OK]** and **[OK]**

Handy to Know...

- To locate a specific recipient, click on **Find recipient** in the **Mail Merge Recipients** dialog box, or click on **Find Recipient** in the **Preview Results** group on the **Mailings** tab. Type the criteria in **Find what**, click on the drop arrow for **In field** and select the field to search in. Click on **[OK]**.

SORTING RECIPIENTS

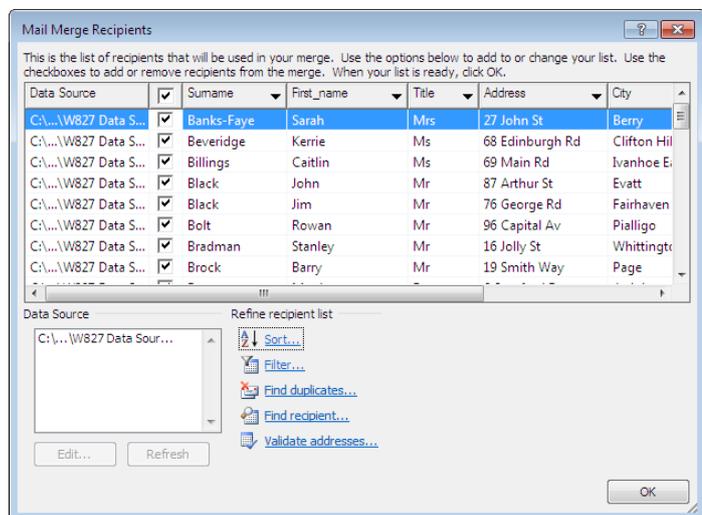
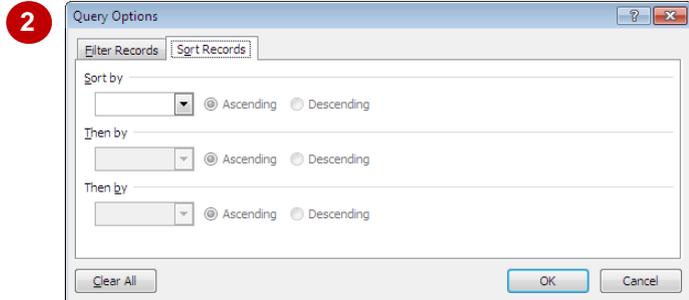
The **Sort** feature allows you to sort recipient records by a specified **field** in either **ascending** (A-Z, 1-9) or **descending** order. For example, you may want the records sorted in **Postcode**

order, or in **Surname** order. The benefits to sorting records before merging and printing are obvious. For one, it takes less time to find the letters you need, and they're easier to file if required.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Click on the **Mailings** tab, then click on **Edit Recipient List**  to open the **Mail Merge Recipients** dialog box
We'll sort the records by post code...
- 2 Click on **Sort** to open the **Sort Records** tab of the **Query Options** dialog box
- 3 Click on the drop arrow  for **Sort by** and select **Surname**
- 4 Ensure that **Ascending** is selected, then click on **[OK]**
The records will appear in ascending order by surname...
- 5 Click on **[OK]** to close the **Mail Merge Recipients** dialog box
- 6 Ensure that **Preview Results**  is selected in the **Preview Results** group, then click on **Next Record**  to preview each letter
- 7 Click on **Preview Results**  to turn off preview mode
- 8 Save the document



For Your Reference...

To **sort recipients**:

1. Click on **Edit Recipient List** 
2. Click on **Sort**
3. Enter the required conditions
4. Click on **[OK]** and **[OK]**
5. Complete the merge

Handy to Know...

- There is more than one way to sort recipient records in the **Mail Merge Recipients** dialog box. You may find it quicker to click on the drop arrow in the **Header** row of the field that you want to sort by. You can then select from a range of sort and filtering options.

SELECTING ANOTHER DATA SOURCE

If you want to send the same document to many people, but the recipient records are contained in more than one data source, you can select a different data source to merge to. This means

that you can merge the main document with one data source, and then merge the same document over and over again using different data sources.

Try This Yourself:

Continue using the previous file with this exercise...

1 Click on **Select Recipients**  in the **Start Mail Merge** group and select **Use Existing List** to open the **Select Data Source** dialog box

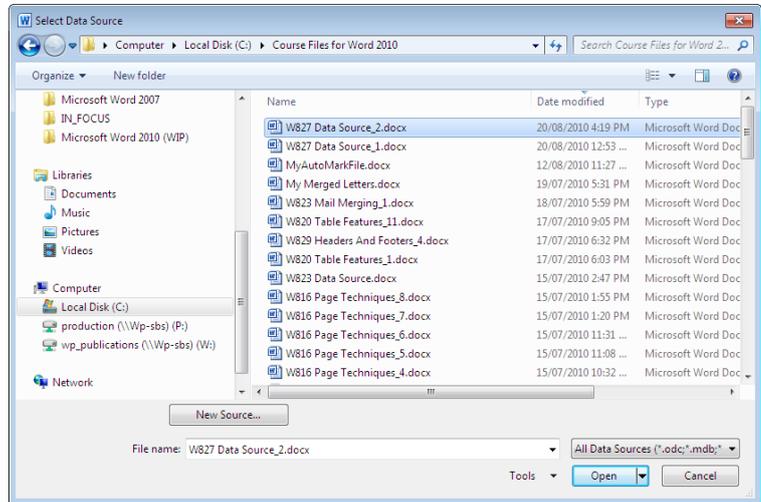
2 Navigate to the course files folder, then double-click on **W827 Data Source_2.docx**

Your merge document will now be attached to a different data source. At this point you could click on **Finish & Merge** to complete the merge, but instead we will just preview the result...

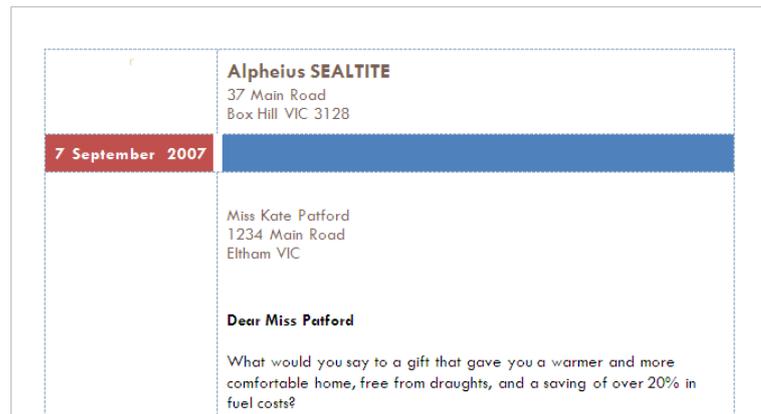
3 Click on **Preview Results**  in the **Preview Results** group and then click on **Next Record**  to preview each letter

There will be 5 form letters to preview...

4 Save and close the document



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For Your Reference...

To **select an alternative data source**:

1. Click on **Select Recipients**  in the **Start Mail Merge** group on the **Mailings** tab
2. Navigate to and select the **data source**
3. Click on **Finish & Merge** 

Handy to Know...

- You can use **Excel** spreadsheets and **Access** database files as data sources. You just need to ensure that the field names in the first (**header**) row of the data source match the **merge field names** in the main document.

APPLYING AN IF...THEN...ELSE... RULE

It's not only recipient information that you can merge into a mail merge document. You can apply **rules** that instruct Word to insert specific information based on the **conditions** you have

set. The **If...Then...Else...** rule instructs Word to insert specific text if a certain condition is met, but if this condition is not met, then insert alternative text instead.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *W827 Merging Techniques_2.docx...*

- 1 Position the cursor at the beginning of the blank line after <<Account_number>>, then click on the **Mailings** tab
- 2 Click on **Rules**  in the **Write & Insert Fields** group and select **If...Then...Else...** to open the **Insert Word Field: IF** dialog box
- 3 Enter the details as shown
*The rule states that **If** the Account_balance is Greater than Zero, **Then** Insert this text, or **Otherwise (Else)** insert this text...*
- 4 Click on **[OK]** and then click on **Preview Results**  in the **Preview Results** group to preview each letter with recipient information, then click on **Next Record**  to preview each form letter
- 5 Click on **Preview Results**  in the **Preview Results** group to turn off preview mode, and then save the document

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For Your Reference...

To **apply** an **If...Then...Else...** rule:

1. Click on **Rules**  in the **Write & Insert Fields** group and select **If...Then...Else...**
2. Select a **Field name**, set the **Comparison** and type the **Compare to** conditions
3. Type the required text, then click on **[OK]**

Handy to Know...

- You can use the **Skip Record If** rule to **exclude** records when they meet specific criteria. To do this, click on **Rules**  and select **Skip Record If....** Complete the fields as required.

APPLYING A FILL-IN RULE

You can apply a **Fill-In** rule to prompt document users to enter specific information. This might be useful particularly when multiple people are using the same mail merge document, for example.

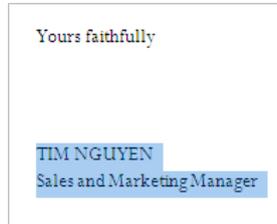
When the merge is run, a dialog box will be displayed prompting the user to enter specific data, such as the date, subject or their signatory, for the fields that have a rule applied.

Try This Yourself:

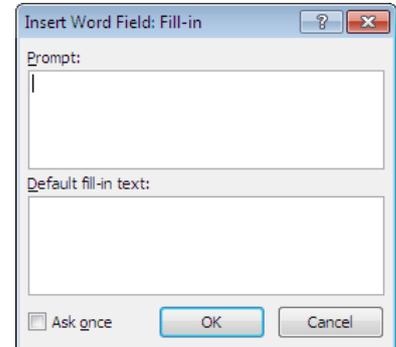
Same File

Continue using the previous file with this exercise, or open the file *W827 Merging Techniques_3.docx...*

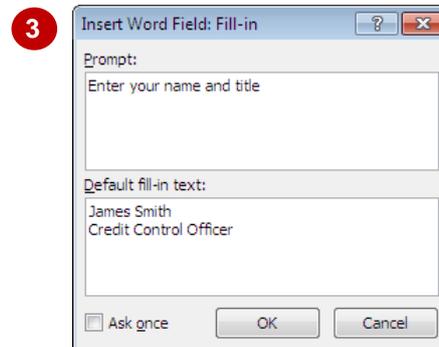
- 1 Select the two lines of text as shown
- 2 Click on the **Mailings** tab, then click on **Rules**  in the **Write & Insert Fields** group and select **Fill-in** to open the **Insert Word Field: Fill-in** dialog box
- 3 Type **Enter your name and title**, press **Tab** and type **James Smith**, then press **Enter** and type **Credit Control Officer**, as shown
- 4 Click on **Ask once** to select it, then click on **[OK]**
Ask once ensures that you are only prompted once during the merge process and not for each record. Word will now test-run the rule...
- 5 Click on **[OK]** to insert the default name and title
You will now test the rule...
- 6 Click on **Finish & Merge**  in the **Finish** group and select **Edit Individual Documents** to open the **Merge to New Document** dialog box
- 7 Click on **[OK]** to start the merge, then click on **[OK]** to accept the name and title
- 8 Save and close the document



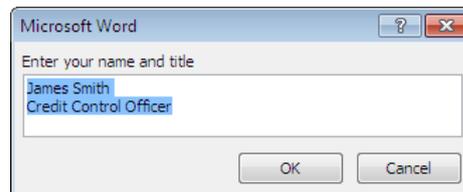
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For Your Reference...

To **apply** a **fill-in rule**:

1. Click on **Rules**  in the **Write & Insert Fields** group and select **Fill-in...**
2. Type the **Prompt** and **Default fill-in text**
3. Tick **Ask once** as desired
4. Click on **[OK]**

Handy to Know...

- To **edit** a rule, right-click on an instance of that rule in the document (such as the inserted name or title), and select **Edit Field** to open the **Edit Field** dialog box. Here you can alter the field **type**, the **Prompt**, as well as the **Default response to prompt**.