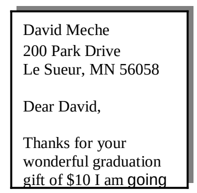
An Overview of the Mail Merge Process

Mail merge letters are used to send the same or similar documents to many different people. Since they contain the recipient's name, address, and other information, mail merge letters feel more personal than letters that aren't specifically addressed to anyone.

Creating and performing a mail merge is a lengthy and multi-stepped process, but Microsoft has done a lot to make performing mail merges in Word user-friendly. If you become confused during one of the next lessons, come back here to see how the step you're on fits into the mail merge process.

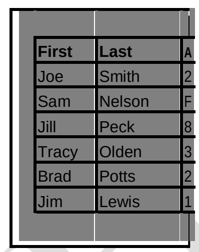
Since this chapter primarily deals with mail merges, you may also want to take a look at the table on the next page, *Mail Merge Definitions*. You will be seeing these terms frequently in the upcoming lessons, so it's a good idea to become familiar with them.

- **Exercise**
- **Exercise File:** None required.
- **Exercise:** Understand the steps of the mail merge process.



Step 1: Set up the Main Document

Select the type of document you want to create with the mail merge. You can create letters, e-mails, envelopes, labels, and directories. The main document contains the text that is the same in all of the merged documents.

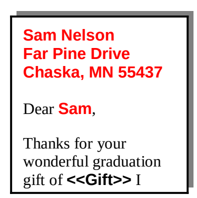


Step 2: Select or Create a Data Source

The data source contains the information you want to appear in the main document. You can create a new data source, use an existing data source, or use a database as the data source.

Step 3: Insert Fields

Write and/or edit the starting document and specify where you want to insert the information from your data source into your starting document.



Step 4: Preview the Mail Merge

Preview how your document will appear when combined with the information in the data source.

Step 5: Complete the Mail Merge!

Merge the data from the data source into the merge fields in the document, creating a unique document for each record in the data source.

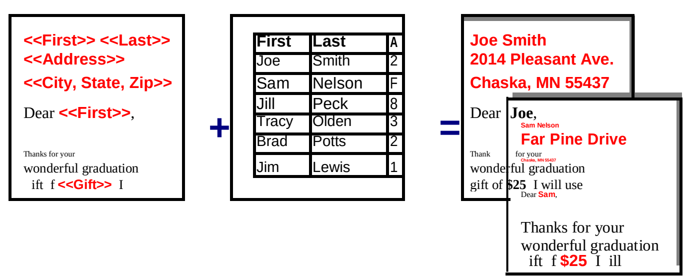


Table 10-1: Mail Merge Definitions

Starting Document	(Main Document) A document that contains the information that is the same for each merged document. The starting document contains the field names for the variable information, like the names and addresses that will be inserted.
Data Source or Recipients List	A file that contains the information to be inserted into the main document during a mail merge. For example, it has records containing the names and addresses of the people a mail merge letter is sent to.
Field	A data category that stores a specific piece of information. For example, the field LastName would only contain people’s last names.
Record	A record is an entire set of data fields that relate to a single thing or person. For example, a single record would include information about a person’s first and last names, address, phone number, and date of birth.
Merge Field	A merge field is where you want to insert the information from a data source into a main document. Merge fields appear with chevrons (« ») around them. An example would be: Dear «FirstName».
Address Block	A group of merge fields that make up the address block in a mail merge document. Word can automatically insert all the appropriate address fields at once, so that you don’t have to insert the five or six merge fields yourself.
Greeting Line	A group of merge fields that make up the greeting line of a mail merge document, such as “Dear Mr. McDonald”. Word can automatically insert all the appropriate greeting text and fields at once, so that you don’t have to insert the text and required merge fields yourself.
Header Row	Data source information is stored in a table. The first row of the table is the header row and contains the field names for the data source. For example, FirstName, LastName, Address.

Step 1: Setting Up the Main Document

All mail merges in Word require two files: a main document and a data source. The main document contains the text that is the same in all of the merged documents.

The first step in the mail merge process is specifying which type of mail merge document you want to create. Let's get started!

- Open a blank document, or open the document you want to use as the main document.

  If you open to a blank document, you can add text later in the process.

- Click the **Mailings** tab on the Ribbon.

  All the commands needed to perform a mail merge are on the Ribbon.

  Tip: You can also use the Mail Merge task pane, which leads you through the mail merge process step by step. To open the task pane, click the **Start Mail Merge** button in the Mailings tab on the Ribbon and select **Step by Step Mail Merge Wizard**.

- Click the **Start Mail Merge** button in the Start Mail Merge group.

  A list of document types appears:

  Letters: The basic content is the same in all the letters, but each one contains information that is specific to an individual recipient, such as name or address.

  E-mail Messages: Like a letter, the basic content is the same in all the letters, but each one contains information that is specific to an individual recipient.

  Envelopes: Creates envelopes that have the same return address, but different destination addresses.

  Labels: Creates labels for each of the recipients attached to the document.

  Directory: The same kind of information, such as name and description, is shown for each item, but the name and description in each item is unique. This type of document can be used for catalogs as well.

- Select the type of main document you wish to use for the mail merge.

  The main document is set up.

- **Exercise**

- **Exercise File:** North Shore Mailing10-2.docx
- **Exercise:** Use the North Shore Mailing10-2.docx document to set up a Letter mail merge.

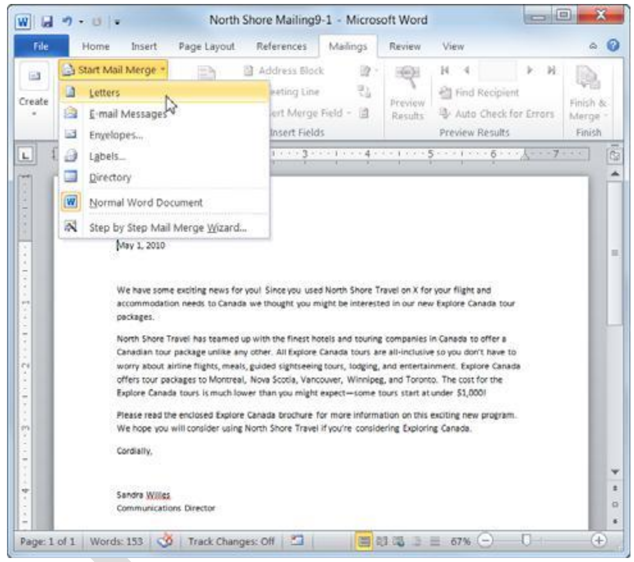


Figure 10-1: Selecting a document type for the main document of the mail merge.

Step 2: Creating a Data Source

The data source provides the information that is unique in mail merge. It provides the information that is unique to each recipient, such as their name and address.

Create a data source

If you do not have a list of recipients that you want to use for the mailing, you can easily create one.

- Click the **Select Recipients** button in the Start Mail Merge group under the Mailings tab.

  A list of options you can use for a data source appears.

- Select **Type New List**.

  The New Address List dialog box appears.

- Enter recipient information in the table.

  Each row contains information that is unique for a single recipient. This is called an entry, or record. Each column contains the information for a field, or category, of information.

- Click the **New Entry** button to add a new row for another recipient's information. Repeat until all recipients have been added.

  Continue adding rows and entering information until all the recipients you want to include have been added.

  Other Ways to Add a Row:
  Press **<Tab>** at the end of a row.

- Click **OK**.

  The Save Address List dialog box appears. Save the data source so you can use it for future mailings and edit the data source as necessary.

  Tip: By default, the data source is saved in the My Data Sources folder in the Documents folder.

- Enter a name for the data source in the File name text box and click **Save**.

  The data source is connected to the main document, and will remain connected even when the document is closed.

▪ Exercise

- **Exercise File:** North Shore Mailing10-2.docx
- **Exercise:** Create a new data source with the same fields shown in the image below.

  Enter data for yourself and a friend to create two more records in the data source.

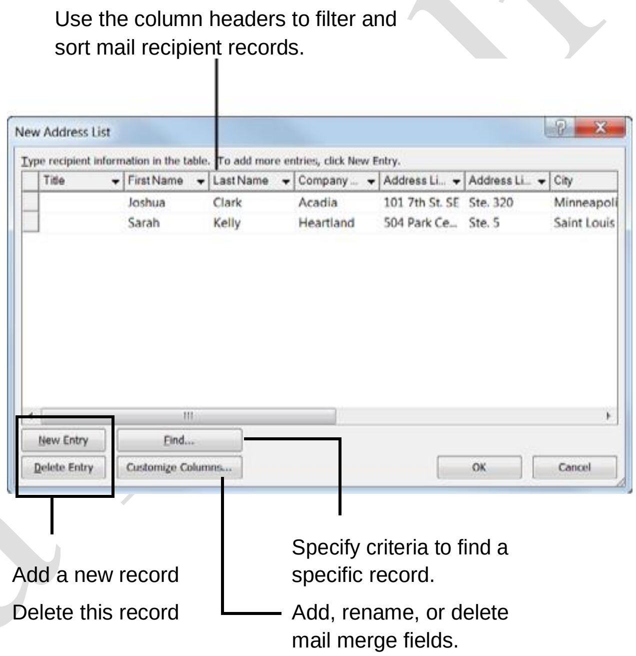


Figure 10-2: Creating a new data source for the mail merge.

Customize data source fields

Customizing the data source fields, or columns, lets you control which information you want to include in each record, and therefore in the mail merge. Choose or create fields for each piece of information you want to have available in the mail merge.

- Click the **Customize Columns** button to customize the fields in the data source.

  The fields are the columns in the table, and the name of the field appears in the header row of the table. For example, if you know you need to use the people's first and last names, you can use the First Name and Last Name fields.

  You can also add fields that are specific to your needs. For example, if you want to include the name of a spouse for a recipient, you can add Spouse First and Spouse Last fields.

- Add, delete, or rename fields you want to use in the data source.

  These fields will appear as columns in the data source table.

- Click **OK**.

  The fields appear as columns in the table.

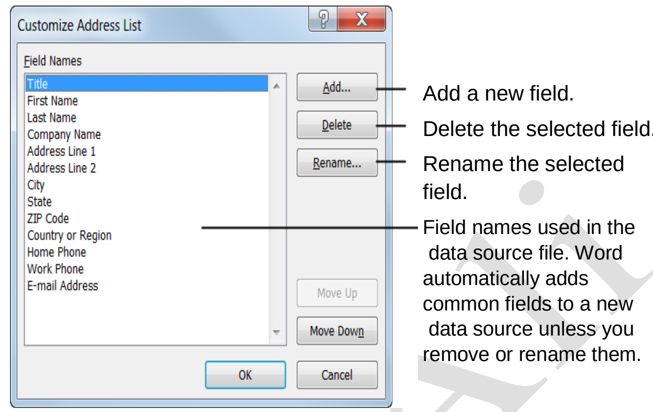


Figure 10-3: Choose the fields you want to include in the data source with Customize Address List dialog box.

Step 2: Selecting an Existing Data Source

There's no need to reinvent the wheel and create a new data source if one exists that contains the information you want to include in a mail merge.

Select an existing data source

If you already have a data source, such as an Access database, an Excel spreadsheet, or a delimited text file, you can use it for your mail merge.

- Click the **Select Recipients** button in the Start Mail Merge group under the Mailings tab on the Ribbon.

  A list of options you can use for a data source appears.

- Select **Use Existing List**.

  The Select Data Source dialog box appears.

- Navigate to the location of the data source you want to use.

- Select the data source and click **Open**.

  The data source is connected to the main document, and will remain connected even when the document is closed.

Use Outlook contacts

If you use Microsoft Outlook, you can select the names and addresses from your Contacts list and use them as the data source for your mail merge.

- Click the **Select Recipients** button in the Start Mail Merge group under the Mailings tab.

  A list of options you can use for a data source appears.

- Select **Select from Outlook Contacts**.

  The Select Contacts dialog box appears. If there are several contact folders that contacts can be imported from, they are listed in the dialog box.

- Select the contact folder you want to use as the data source and click **OK**.

  The data source will remain connected to the document, even when the document is closed.

▪ **Exercise**

- **Exercise File:** Canada tourists.mdb and North Shore Mailing10-2.docx
- **Exercise:** Connect the Canada tourists.mdb file to the main document.

Table 10-2: Types of Data Sources

Spreadsheet Files **Microsoft Excel** **Lotus 1-2-3**	You will need to specify the cell range or the entire file.
Database Files **dBase** **Fox Pro** **Microsoft Access** **Microsoft Outlook**	If the database contains more than one table, you will have to select the table you want to use. Data sources you have created previously in Word are database files.
Word Processing Files **Microsoft Word** **WordPerfect**	Records must be stored in a table or in a tab-delimited list.
Text Files	Must be a tab or comma delimited text file.

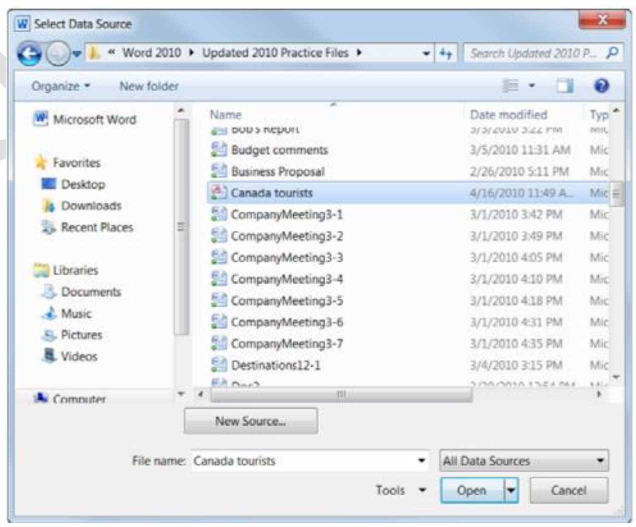


Figure 10-4: Select a data source to use for the mail merge.

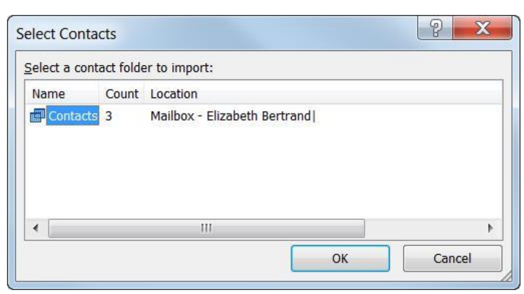


Figure 10-5: Select the folder you want to use for the data source.

Step 3: Inserting Merge Fields

After the main document is set and the recipient list is connected and edited, you are ready to insert the merge fields in the document. The merge fields are placeholders in the document for unique information from the recipients list. So when you put a merge field in the main document, information from that field will appear for the document that is unique to that recipient.

- Place the insertion point where you want to insert a merge field.

  The merge fields that are available for you to insert depend on the fields in the data source. There are three buttons you can use to insert merge fields in the main document:

  Address Block: This is a combination of several fields that you can use to insert the name and postal address of recipients. You can specify which information is included in the address block, such as how you want the recipient's name to appear and whether or not you want the country and region included in the address. A preview of how the information will appear for each of the recipients is also available here.

  Greeting Line: This is a combination of fields you can use to insert the recipient's name in the greeting line. This option also allows you to specify how you want the greeting line to appear. For example, choose a greeting ("To" or "Dear") and specify how you want the recipient's name to appear.

  Insert Merge Field: Insert a single field from the data source in the main document. When you click this button, a list of merge fields you can insert appears.

- In the Write & Insert Fields group on the Ribbon, click the button for the field you want to insert.

  When a merge field is inserted, chevrons (<< >>) surround the name of the field. This helps you distinguish the fields from the regular text in the document.

  When the mail merge is performed, the information will not appear in chevrons.

- Repeat for each merge field you want to insert.

Exercise

- **Exercise File:** North Shore Mailing10-3.docx and Canada tourists.mdb
- **Exercise:** Insert Address Block and Greeting Line fields after the date at the top of the letter.

  Insert the TravelDate field in place of the X in the second sentence of the letter.

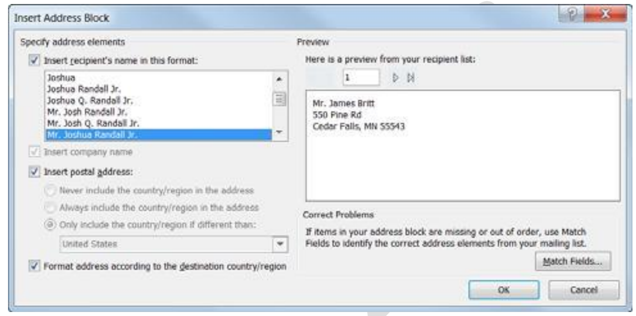


Figure 10-6: Choose how you want the address block to appear in the Insert Address block dialog box.

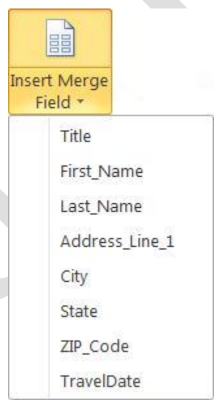


Figure 10-7: Insert a single merge field in the main document.

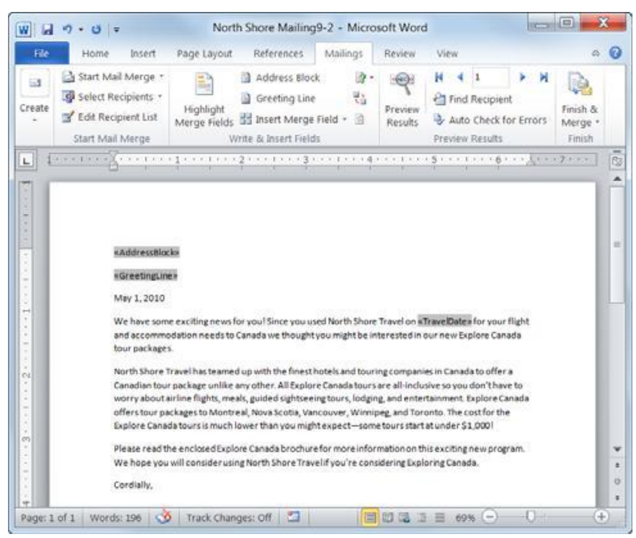


Figure 10-8: The main document with merge fields inserted. The merge fields are shaded gray and have chevrons << >> around them.

Step 3: Inserting Rules Fields

In addition to merge fields, you can insert rules fields that customize your mail merge documents even more.

Tips

- You'll probably want to skip this lesson unless you're really into mail merges; most people will never really need to use rules fields.

- Place the insertion point where you want to insert a rules field.
- Click the **Rules** button in the Write & Insert Fields group of the Mailings tab on the Ribbon.

  A list of fields you can insert appears. Refer to the table below for more information on the types of fields you can insert.

- Select the field you want to insert in the main document.

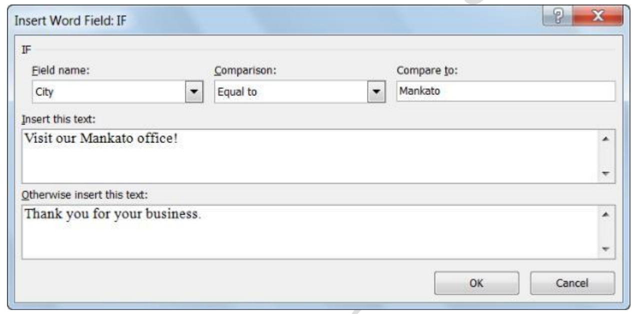
  If a dialog box appears, enter the information necessary to insert the field.

Tips

- When these fields are entered, they don't appear with chevrons (<< >>) around them, like other merge fields. You may not even know the field has been inserted until the mail merge is finished.

Exercise

- **Exercise File:** North Shore Mailing10-4.docx and Canada tourists.mdb
- **Exercise:** Insert an If…Then…Else… field at the end of the last paragraph in the letter. If the record has Mankato in the City field, insert this text: "Visit our Mankato office!" Otherwise, insert this text: "Thank you for your business."



First, specify what you want to test for. Then insert the text if the test is or is not true.

Figure 10-9: The Insert Word Field: IF dialog box.

Table 10-3: Mail Merge Rules Fields

Ask	Prompts for information from the user and assigns the response to a bookmark.
Fill-in	Prompts for information from the user as Word merges each data record with the main document. The response is printed in the specific form letter.
If… Then… Else…	Merges information only if a specified condition is met.
Merge Record #	Prints the number of the merged data record in the merged document.
Merge Sequence #	Counts the number of data records that were successfully merged with the main document. This could be helpful to calculate postage.
Next Record	Instructs Word to merge the next data record into the current merged document, rather than starting a new merged document. This is often used with labels and catalogs.
Next Record If	Compares two expressions. If the comparison is true, Word merges the next data record into the current merge document.
Set Bookmark	This field assigns specific information to a named variable, which is called a bookmark. In order for the information to appear in the document, insert a REF field that refers to the bookmark.
Skip Record If	This field compares two expressions. If the comparison is true, the current record is skipped. If the comparison is false, the current record is merged. (It may be easier to filter the recipient list.)

Step 4: Previewing a Mail Merge

Sometimes it is helpful to see what the data will look like once it has been inserted into a document, instead of only viewing the obscure merge field names. You can easily preview how the mail merge will appear before finishing the mail merge. This is encouraged to make sure the results appear as you want them to.

- Click the **Preview Results** button in the Preview Results group of the Mailings tab.

  The data from the first record is previewed in the document.

- Use the preview results buttons to preview how records from the data source will appear when merged.

  As you browse through the previews, you see how each record in the data source will appear when merged with the main document.

  Tip: Click the **Find Recipient** button in the Preview Results group to search for a specific recipient.

Tips

- You can simulate the mail merge process to make sure it will run smoothly before performing the final merge. Click the **Auto Check for Errors** button in the Preview Results group. Select the **Simulate the merge and report errors in a new document** option and click **OK**.
- Previewing the mail merge does not include preview rules fields.

- **Exercise**
- **Exercise File:** North Shore Mailing10-5.docx and Canada tourists.mdb
- **Exercise:** Preview all the records in the mail merge.

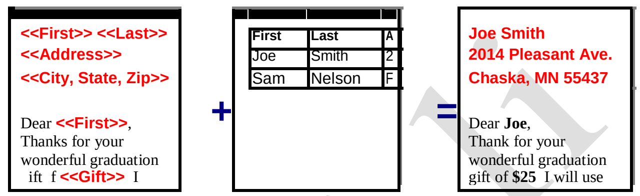


Figure 10-10: An example of how a data source record is merged into the letter.

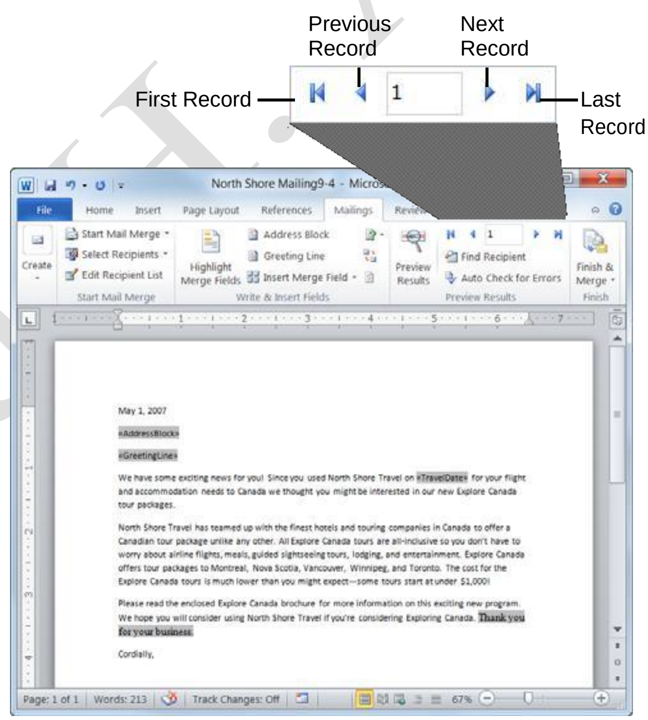


Figure 10-11: A preview of the merged main document. Use the buttons in the Preview Results group to cycle through previews of merged records in the data source.

Step 5: Completing the Mail Merge

After you've previewed how the main document and data source will merge, and everything looks correct, you are ready to complete the mail merge.

- Click the **Finish & Merge** button in the Finish group of the Mailings tab on the Ribbon.

  There are three different ways you can finish the mail merge:

  Edit Individual Documents: Puts the results of the mail merge in a new document. You are free to edit the results of the mail merge and save and print them, just like any other document.

  Print Documents: Merges records and sends them directly to the printer.

  Send E-mail Messages: Sends the mail merge as an e-mail message. This works best if you have used Microsoft Outlook Contacts as your data source.

- Select the option you want to use to finish the mail merge.

  A dialog box appears, asking which records you want to merge from the data source.

- Select the records you want to merge and click **OK**.

  Word merges the main document and the information from the data source into a new Word document, sends it to the printer, or creates an e-mail message.

- **Exercise**
  - **Exercise File:** North Shore Mailing10-5.docx and Canada tourists.mdb
  - **Exercise:** Finish the mail merge to individual documents.

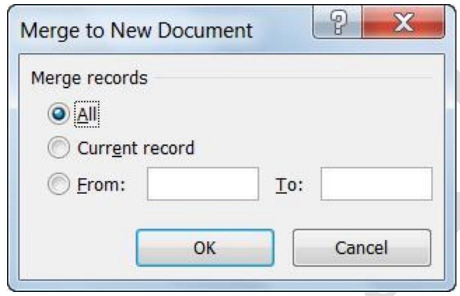


Figure 10-12: The Merge to New Document dialog box.

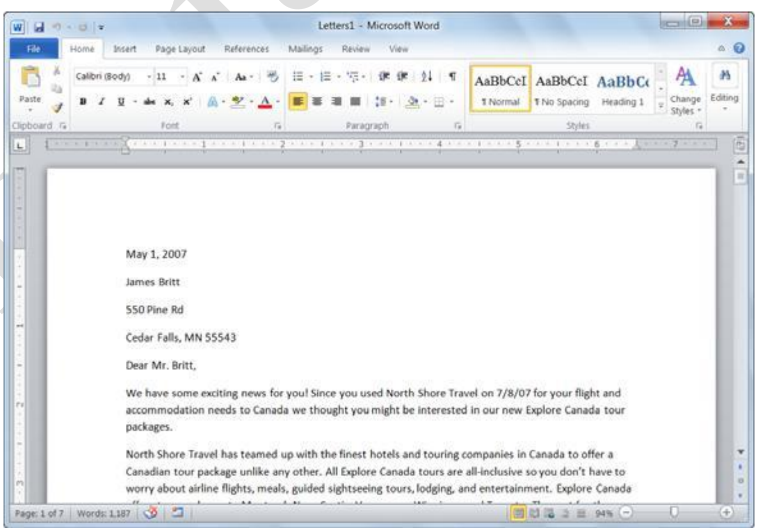


Figure 10-13: The new, merged document.

Editing the Data Source

Once you have connected a data source to the main document, you can choose which data source records you want to include in the mail merge, and you can also edit the data source to add records or change record information.

Select and sort recipients in the data source

You can change the recipients list without changing the data source by choosing which recipients you want to be included in the mail merge, and by rearranging and filtering the recipient list.

- Click the **Edit Recipient List** button in the Start Mail Merge group on the Mailings tab.

  The Mail Merge Recipients dialog box appears. By default, all the records in the data source will be included in the mail merge.

  There are three ways you can work with the recipients list:

  Select individual records: If the list of recipients is relatively short, this is the easiest way to include or remove records from the data source. Records that are checked will be included: records that are not checked are removed.

  Additionally, you can check or clear all the records at once by clicking the check box in the header row.

  Sort records: Click a column heading to sort the list by that field. If you want to use a more complex sorting method, such as sorting by several fields, you can:

  Click the **Sort** link and choose the field(s) you would like to sort by. For example, you could alphabetically sort recipients by their last name within each state.

  Filter records: Filtering the list is useful for filtering out large groups of records.

  Click the **Filter** link and choose the criteria you want to filter for. For example, to only include records from Texas, select State for the field, Equal to for the comparison, and TX in the compare to text box. Only records with TX in the State field are shown.

- Edit the recipient list as necessary and click **OK**.

  The recipient list is ready for the mail merge.

Exercise

- **Exercise File:** North Shore Mailing10-5.docx and Canada tourists.mdb
- **Exercise:** Sort the data source by last name.

  Deselect the Jeff Mitchell record.

  Apply a filter that only shows records from MN.

  Add a record to the data source using information about you.

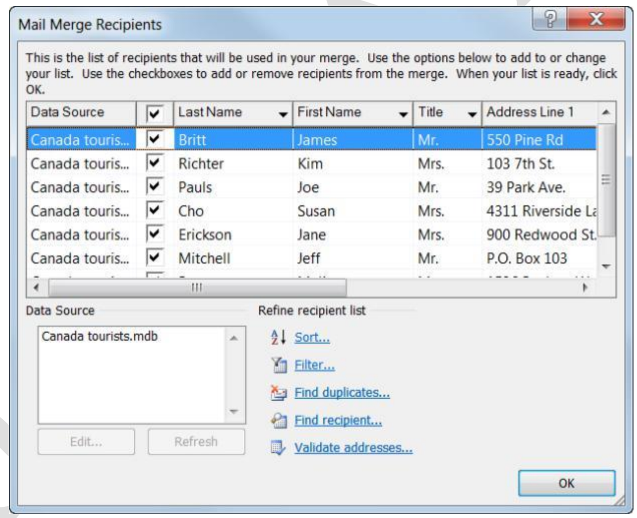


Figure 10-14: The Mail Merge Recipients dialog box. To sort the list, click the appropriate column heading. Use the check boxes to add or remove a recipient from the mail merge.

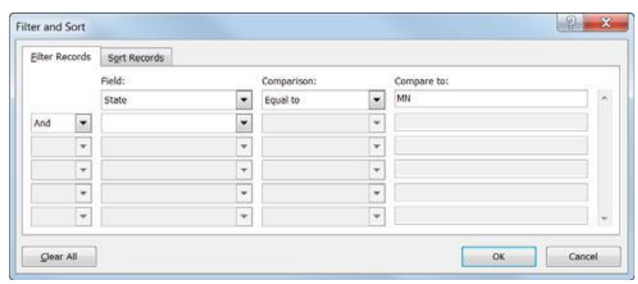


Figure 10-15: Specifying filter criteria for the data source.

Edit the data source

You can edit the data source to add recipients or to change record data after the data source has been connected to the main document.

- Click the **Edit Recipient List** button in the Start Mail Merge group under the Mailings tab.

  The Mail Merge Recipients dialog box appears.

- Select the **data source** in the Data Source box in the bottom left corner of the dialog box.

  You can only have one data source connected to a document at a time, so there should only be one item listed here.

  Once the data source is selected, the two buttons below the box become available.

- Click the **Edit** button.

  The Edit Data Source dialog box appears.

  You can edit the data in records, or use the buttons in the lower left corner of the dialog box to add or delete records, find a record, or customize the fields in the data source.

- Edit the data source as necessary and click **OK**.

  A dialog box appears, asking if you want to update these changes to the data source.

- Click **Yes**.

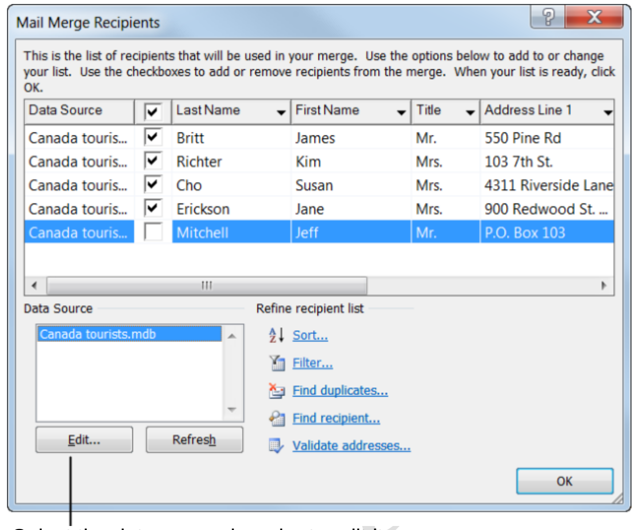
  The Edit Data Source dialog box closes. You're back at the Mail Merge Recipients dialog box. You can still make changes to the data source before returning to the main document.

- Click **OK**.

  The recipient list edited and is ready for the mail merge.

Tips

- Click the **Refresh** button under the Data Source box to update the recipient list if the data source has been changed since it was connected to the main document.



Select the data source in order to edit it.

Figure 10-16: The Mail Merge Recipients dialog box.

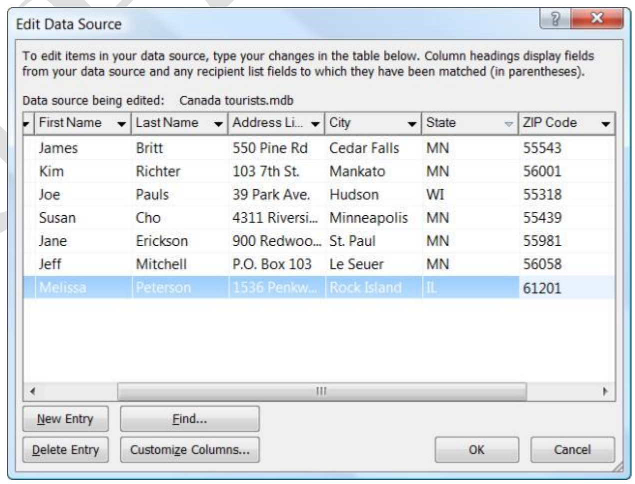


Figure 10-17: Edit the data source by changing previous entries or adding new ones.

Creating Labels

So far we've been using the mail merge feature to create formal letters, but you can also use it to create professional-looking mail labels or envelopes.

Create labels with the same information

This process shows you how to create a sheet of labels that contain the same information, for example, return address labels, or print a single label on a sheet.

- Click the **Mailings** tab on the Ribbon and click the **Labels** button in the Create group.

  The Labels tab of the Envelopes and Labels dialog box appears.

- Click the **Address** box and enter the address you want to appear on the labels.

  The address is what will be printed on the labels.

- Choose **Full page of the same label** or **Single label** to select how you want to print the label.

  If you choose Single label, indicate the label you want to print on by specifying the row and column where the label is located on the sheet.

- Click the **Options** button to select the type of label being used.

  The label package should tell you the type of label being used.

- Click **Print** to print the labels, or click **New Document** to open a document that lists the address on a single page.

  Use the New Document option if you want to do any formatting with the labels.

Create mail merged labels

Use the mail merge process to create labels from a data source.

- Click the **Mailings** tab on the Ribbon.

  The commands needed to create a mail merge appear.

- Click the **Start Mail Merge** button in the Start Mail Merge group and select **Labels** from the list.

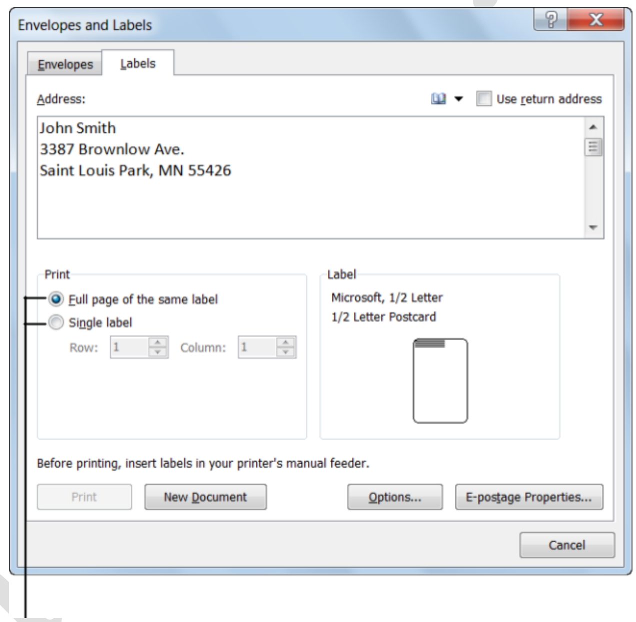
  The Label Options dialog box appears.

▪ Exercise

- **Exercise File:** Canada tourists.mdb
- **Exercise:** Open a new Word document.

  Create a page of labels using your home address as the address.

  Create labels using the records from the Canada tourists.mdb data source.



Print the same label on the full page, or specify the row and column coordinates for the label you want to print on.

Figure 10-18: The Labels tab of the Envelopes and Labels dialog box.

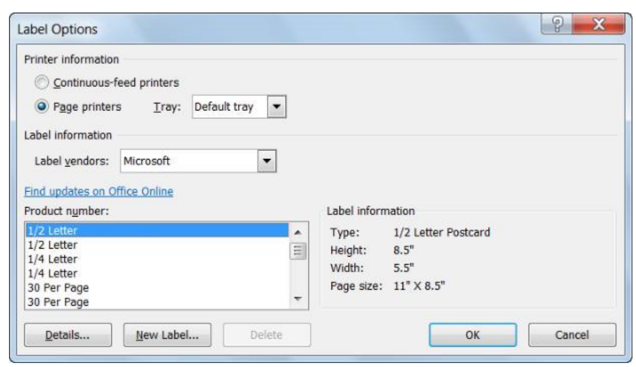


Figure 10-19: The Label Options dialog box. Select the type of label you want to use from the Product number. Click the Details button to change the dimensions of the label, or click New Label to create a custom-sized label.

- Select the type of label you will be printing on and click **OK**.

  The document changes into a table that is separated into cells that are the size of the labels.

  The rest of the process is standard mail merge procedure.

- Click the **Select Recipients** button in the Start Mail Merge group and select the data source you want to use.

  Notice that once you select a data source, <<Next Record>> merge fields appear in all the label cells, except the first one. This allows the mail merge to merge the results from each record into each cell of the table, rather than repeating the information from the first record.

  You can also edit the data source after it has been attached to the document.

  Since labels typically include an address, all you have to do is insert the address block as a merge field in the first cell.

- Click the **Address Block** button in the Write & Insert Fields group.

  The Insert Address Block dialog box appears.

- Choose how you want the name to appear and click **OK**.

  The merge field is inserted.

  The next step is specific to creating a mail merge for labels. It copies the Address Block merge field in each label cell of the table.

- Click the **Update Labels** button in the Write & Insert Fields group.

  The Address Block merge field is inserted in each cell of the table.

  Now you're ready to preview the labels.

- Click the **Preview Results** button in the Preview Results group.

  If the preview looks good, you're ready to finish the mail merge.

- Click the **Finish & Merge** button and select how you want to finish the mail merge.

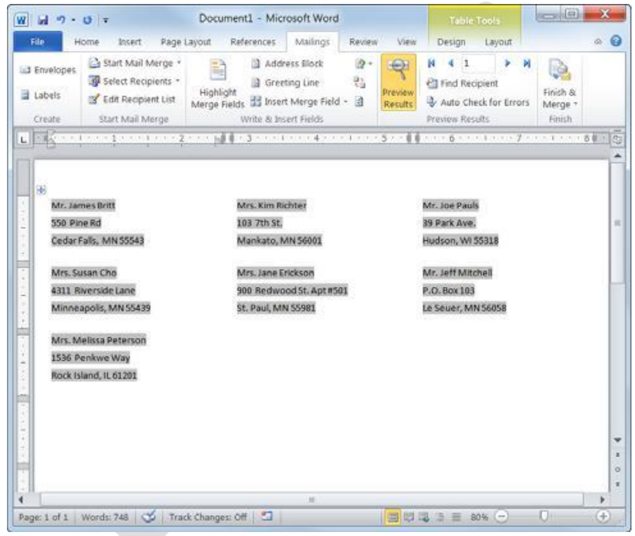


Figure 10-20: The merged label document.

Creating Envelopes

If you suffer from terrible handwriting, you can have Word address your envelopes for you. Word is great for printing envelopes if your printer can handle envelopes. That's a big if—many printers don't handle envelopes very well, and many others don't handle envelopes at all. The only way to really find out if you can print envelopes with your printer is by consulting the manual that came with your printer.

Tips

- If you've misplaced your printer manual, you can try printing several envelopes with the printer to see how they come out—just be prepared to go through several envelopes before you find out how to feed the envelope into the printer!

- Click the **Mailings** tab on the Ribbon and click the **Envelopes** button in the Create group.

  The Envelopes tab of the Envelopes and Labels dialog box appears.

- Click the **Delivery address** text box and type the delivery address.

  This is where you want the envelope to be delivered.

  Other Ways to Enter the Delivery Address: Click the **Insert Address** button ( ). Select the profile you want to use (Outlook) and select a contact from Outlook Contacts.

- Click the **Return address** text box and type the return address.

  This should be the return address.

- Click **Print** to print the envelope, or click **Add to Document** to add the envelope to the beginning of the document.

  If you add the envelope to the document, make sure the envelope and paper are in the correct order before printing the document.

Change envelope options

If you want to use a different envelope size or change the font used, you can change the envelope options.

- Click the **Options** button in the Envelopes tab of the Envelopes and Labels dialog box.

  Two tabs can help you specify how the envelope will be printed:

Exercise

- **Exercise File:** None required.
- **Exercise:** Create an envelope with your address as the Return address and a friend's address as the Delivery address.

  Change the font used for the delivery address.

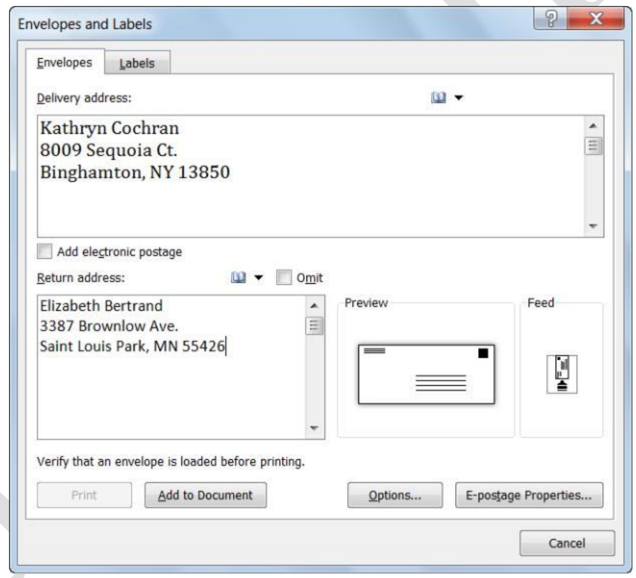


Figure 10-21: The Envelopes tab of the Envelopes and Labels dialog box.

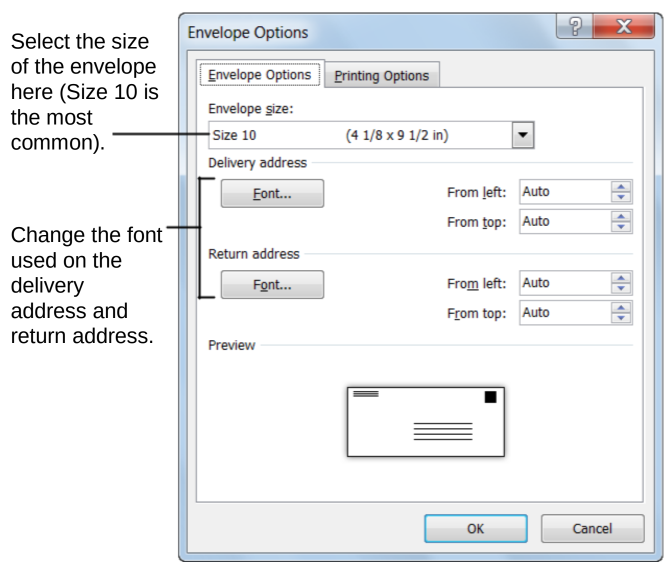


Figure 10-22: The Envelope Options dialog box.

Envelope Options: Verify the envelope size, the font used in the return and delivery addresses, and adjust the location of the addresses on the envelope.

Printing Options: If necessary, you can change how the envelope is fed to the printer. These settings are automatically selected, however, so it is best not to adjust them.

- Enter the envelope settings you want to use and click **OK**.

  The Envelope Options dialog box closes, but the Envelopes and Labels dialog box is still open.

- Click **OK**.

  The Envelopes and Labels dialog box closes and the changes are applied to the envelope.

Reference: CustomGuide Online Learning