Mail Merge in Word

Workbook

Edition 3
December 2007
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Edition 3, December, 2007

Document Number: B.2.-WB.3468
Preface

The Mail Merge feature enables you to take information from two documents, one, a Main Document and two, a Data Source, and combine them into a single document. Mail Merge automates time-consuming tasks such as creating standard (form) letters, labels, memos, and reports.

This workbook takes you through the steps for creating a mail merge and using the process to create mailing labels. It helps to be confident first with the basics of entering, editing and formatting text in Word.

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Mail Merge in Word
**Introduction**

The Mail Merge feature allows you to write to many different people with the same information which may or may not be modified for each individual. On opening Mail Merge (Tools/Letters and Mailings/Mailmerge), a Task Pane appears to the right of the document and is visible throughout the entire Mail Merge procedure. The Task Pane will guide you through the mail merge and help you create customized form letters, labels and envelopes.

![Mail Merge Task Pane](image)

There are 6 steps in the procedure. You are given information on the choices available at each step. When you complete a step, click the **Next** button at the bottom of the Task Pane to move forward to the next step. If you make a mistake, click the **Previous** button to retrace your steps.

The Mail Merge feature takes information from two documents; one, a **Main Document** and the second, a **Data Source**, combining them into a single document.

**The main document:** can be a standard letter, labels, envelopes, e-mail messages or a directory.

**The data source:** is a file that contains recipients’ names and addresses, plus any other variable information.

The following is a complete list of the steps required to create a Mail Merge. The Main Document is a standard letter. The Data Source File is created from scratch.
To start the Mail Merge

- Open a new document.

- In the Tools menu, point to Letters and Mailings and then click Mail Merge. A Task Pane appears to the right of the document.

**Step 1 of 6: Select Document Type**

- In the Mail Merge Task Pane, click Letters (if necessary). (When you click an option button, a brief description of that option is displayed in the centre of the Task Pane.)

**Step 2 of 6: Select Starting Document**

- Go to the bottom of the Task Pane and click Next: Starting document

You have a choice of three options when starting the document.

- **Use the current document:** this is the blank document already on screen.
- **Start from a template:** use this option if you already have a letter template that you prefer to use, or you can base your document on one of Word’s mail merge templates.
- **Start from existing document:** open an existing document that already contains the pre-typed text.

- In this instance, choose, **Use the current document**.

- To continue to the next step, click Next: Select recipients.

**Step 3 of 6: Select Recipients**

The next step is to specify and create the file that contains the recipients’ names and addresses (the Data Source) so that Word can attach it to the letter. There are three options for moving forward in this step:

- **Use an existing list**
- **Select from Outlook contacts**
- **Type a new list**.

- Under Select recipients, select **Type a new list**, to create a list of recipients to whom the mail will be sent.

- Under **Type a new list**, click Create to open the New Address List dialog box.

The New Address List box has data fields, any of which can be used in the mail merge, or you can delete them and add your own. (Note: These data fields are the link between your letter and the data source file.)

- To delete or add fields, click the Customize button.

- To remove a field name, select it and click Delete. Fields must be deleted individually - you cannot select multiple fields. If necessary, use the Move Up and Move Down buttons to arrange the fields in the order you want.
With **Title** selected, click **Delete** - a message box appears asking for confirmation.

Click **Yes** to delete the field.

Delete the Field Names: Company Name, Address Line 1, Address Line 2, City, State, ZIP Code, Country, Home Phone, Work Phone, and E-mail Address

Click **Add** (to add new field names to the list).

In the box, enter **Department**.

Click **OK** to add this field name to the list.

Repeat this action to add the following: **Subject, Year_of_Study, Exam_Date** (Note that spaces are not allowed in field names.)

Click **OK** to close the **Customize Address List** dialog box.

In the **New Address List** dialog box, enter data as shown.

**First Name:** Theo, **Last Name:** Colbin, **Department:** Physics, **Subject:** Physics 1, **Year_of_Study:** 1, **Exam_Date:** 12/11/03.

Click **New Entry** and enter another two records as shown.

You can view and edit the records by clicking the **Next** or **Previous** button.
Click Close, the Save Address List dialog box appears.

Call the file My_data_source. The data source will be saved as a Microsoft Office Address Lists file type, in the My Data Sources folder.

Note: This database file is stored in a special format allowing it to be managed directly from the Mail Merge function.

Save the file.

The Mail Merge Recipients box appears and you have the option to sort or filter the address list.

Click OK to return to Mail Merge. In the Task Pane, you can now see the name of the data source file in the taskpane which states “Currently, your recipients are selected from:”

[Office Address List] My_data_source

**Step 4 of 6: Write the standard letter**

Click in Next: Write your letter.

Type the standard text of the letter as below, putting a [tab] between Department, Subject and Year.

Dear

Department: Subject: Year:

Your examination has been scheduled for . It will take place in the department and you are requested to arrive ten minutes before it starts at 9:30am.

Yours sincerely,

Department Secretary
**Enter the fields - add recipient information to your letter**

- Place the insertion point where you want to insert the first merge field. The **Mail Merge Task Pane** lets you choose from the following merge field options:

  **Address Block: Greeting Line:Electronic Postage:More items...**

- To access your own fields, click on **More Items**.

- As you select the fields in turn, the **Insert Merge Field** dialog box is opened.

- Click **Insert** then **Close**.

- Again, click in **More Items**, repeating the above until all your fields are inserted, ensuring that you have the insertion point in the correct place.

Note: Unlike previous versions of Mail Merge, you cannot click back and forth between the **Insert Merge Fields** box and the main document to insert fields. You must insert one field at a time, close the **Insert Merge Field** box, insert a space (if required) between fields in the main document, and then repeat these actions for each additional merge field.

- When you have finished editing the main document, save and name the file.

- To advance to the next step, click **Preview your letters**.

**Step 5 of 6: Preview Your Letters**

- Click the arrow buttons in the Task Pane to preview the letters.

- Make any last minute changes to the data source file by clicking **Edit recipient list** and close the document.

- To proceed to the final step, click **Next: Complete the merge**.

**Step 6 of 6: Complete the Merge**

You are now ready to print the letters and there are two options:

- **Print**: Click this option to print the letters. The **Merge to Printer** box lets you choose which records to send to the printer.

- **Edit individual letters**: This allows you to personalise individual letters. With
this option you get the Merge to New Document box. Click OK and the letters are merged to a new document, thereby giving you the opportunity to edit each individual letter. You will see that each letter is separated by a section break (when in Normal View). When you are ready to print the letters, click Print on the File menu.

Note: If you are familiar with mail merge in previous versions of Word then you can choose not to use the Task Pane. Instead, choose View/Toolbars-Mail Merge to display the Mail Merge toolbar and click the Main document setup button to begin.
Using data source files

The information in a data source is stored as data records in a table. For example, a student data source stores information such as student names, subject and addresses. After creating a data source, you can examine, modify, sort, and filter records in the data source.

Examining data sources

To examine a data source, click the Mail Merge Recipients button on the Mail Merge toolbar. All the records in the data source appear in the Mail Merge Recipients dialog box.

The following table shows the buttons on the Mail Merge toolbar and their functions.

<table>
<thead>
<tr>
<th>Button</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Open Data Source</td>
<td>Helps you select a data source.</td>
</tr>
<tr>
<td></td>
<td>Mail Merge Recipients</td>
<td>Displays all the records in the source.</td>
</tr>
<tr>
<td></td>
<td>Insert Merge Fields</td>
<td>Helps you insert fields in the document.</td>
</tr>
<tr>
<td></td>
<td>View Merged Data</td>
<td>Merges the data source with the document and makes it visible.</td>
</tr>
<tr>
<td></td>
<td>First Record</td>
<td>Displays the first record.</td>
</tr>
<tr>
<td></td>
<td>Previous Record</td>
<td>Displays the previous record.</td>
</tr>
<tr>
<td></td>
<td>Next Record</td>
<td>Displays the next record.</td>
</tr>
<tr>
<td></td>
<td>Last Record</td>
<td>Displays the last record.</td>
</tr>
</tbody>
</table>
Sorting records

Before you print your standard letters, you may want to sort them in a particular way. For example, you might want to print all the letters in alphabetical order by last name. You can do this by sorting the records in the data source by a field in ascending or descending order. By default, the records are sorted in ascending order.

To sort records:

✦ Click the Mail Merge Recipients button to open the Mail Merge Recipients dialog box.

✦ Click in the arrow as shown to display a menu.

✦ Choose (Advanced…) to open the Filter and Sort dialog box.

✦ Activate the Sort Records tab.

✦ From the Sort by list, select Last_Name.

Your list of field names appears. You can sort records according to any of the field names. Next to Sort by, Ascending is selected by default.

✦ Click in Descending.

✦ Click OK to close the Filter and Sort dialog box. In the Mail Merge Recipients dialog box, the records are sorted by Last_Name in descending order.

✦ Click OK.

✦ To view all your records, click in the arrows under Preview your letter.

✦ Save the document.
Merging addresses into mailing labels

You can also create mailing labels by using the mail merge feature. This is done by merging data from a data source into a mailing label document. The steps to do so are as follows.

- Create a document and open **Mail Merge**.
- Under **Select document type**, select **Labels**.
- In the next step of the wizard, click **Next: Starting document**, then **Label options** to open the **Label Options** dialog box.
- Specify the printer and label settings in the Label Options dialog box.
- Click **OK**. A sheet of labels with the specified label information is created.
- Specify the data source by clicking **Browse**. Click **Next: Select recipients**. This opens the **Mail Merge Recipients** dialog box.
- Close the dialog box and move to the next step in the wizard.
- Insert the fields in the document.
- Click **Update all labels** to add the labels to all the divisions in the document.
- Click the **View Merged Data** button.

**Preparing mailing labels**

- Open a new document.
- Choose **Tools**, **Letters and Mailings**, **Mail Merge** and select **Labels**.
- Click in **Starting document**, choose **Label Options** under **Change Document Layout**. Select the label to match your stationery (in this case, select **5159-Address**).

- Click **OK** to create a sheet of labels with the specified label information.
- Click **Next: Select recipients**.
- Under **Use an existing list**, click **Browse** to open the **Select Data Source** dialog box.
- Open your file, **My_data_source** to open the **Mail Merge Recipients** dialog box.
- Click **OK** to close the dialog box.
- The first division is blank. In the other divisions, the field, **Next Record** appears.
- Click **Next: Arrange your labels**.
Under **Arrange your labels**, click **More items** to open the **Insert Merge Field** dialog box.

Select each appropriate field, putting a space or return between fields as necessary, clicking **Close** after each field.

Under **Replicate labels**, click **Update all labels on the Task Pane**.

To insert the fields in all the divisions.

Save the document as **My_label_form**.

**Viewing the merged labels**

Click on **Next - Preview your labels**.

This will show how the labels will appear when printed.

Save the document as **My mailing labels**.

**Preview and print labels**

Before printing mailing labels, you can preview them by clicking on the arrow buttons on the Task Pane.

**Printing labels**

(Choose **File, Print.**) The **Print** dialog box appears. Select the printer and click **OK** to print the document.

Save and close the document.

Note: Saving the merged results is optional.