Mail Merge

Using Microsoft Word



# Mail Merge

**Mail Merge** if a feature that has become common in Word Processing applications. It allows duplicate copies of a document to be created with each copy being customised in certain ways. For example, the diagram below shows different copies of the same letter that have used a Mail Merge to place each letter recipient's name at the top.





This can be very useful for documents like letters, envelopes and mailing labels. For example, if you had a letter to send out to 50 customers, you could create one copy of the letter and then use Mail Merge to place each customer's name and other relevant details in the right places. This allows you to make each copy of the letter more personalised without the need for creating each copy from scratch.

There are several things you need to do in order to do a mail merge, which don't necessarily have to be done in this exact order.

- Decide what type of merge you will do (letter, mailing labels etc).
- Create the document that will be used for the merge.
- Create/open the data source that will be used to provide the personalised details for each copy.
- Insert data fields in to the document where the personalised details and other variable details (such as the current date) can go.
- Perform the merge to create the copies of the document.
- **Note** In different versions of Word there are variations in the way Mail Merges are done. The procedure changed quite a bit when Word 2002 (XP) was introduced. These exercises show the process using Word 2003 which hasn't changed much from the 2002 version, though some screens may look slightly different.

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#### Mail Merge

#### Exercise 1. Creating the Document

- 1) Create a new blank Word document.
- 2) Type the following document exactly as it appears with blank lines where indicated (correct any errors that appear).

<blank line>

<blank line>

<blank line>

<blank line>

Dear

<blank line>

As a valued customer, we could like to take this opportunity to thank-you for shopping with Nutty Net, the Internets leading online peanut sellers. We would also like to let you know that we are moving to a new, bigger location in Perth's Central Busines District. Our new premises will allow us to stock a greater variety of peanuts so that there will be more for you to choose from.

The move will take place at the end of January. After that time, you will still be able to order from our websit as normal, but postal orders will need to go to our new address. The new address will be :

49a Walnut Lane East Perth Western Australa 6004

Our website and our email address are still:

www.nuttynet.com.au

peanuts@nuttynet.com.au

Feel free to visit our website and browse through our catalog to see the new aditions that the new larger premise will allow us to add to our range of peanuts. We look forward to continuing to serve your nutty needs.

The Manager

Nutty Net

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### Exercise 2. Manually Inserting a Field

- 1) Save the document you just created as *Mail Merge Letter*.
- 2) Click in the first blank line of the document.
- 3) From the **Insert** menu select **Field**.

ategories:	Date formats:	
(All) jeld names: AutoNumQut AutoText AutoTextList BarCode BidiOutline Comments Compare CreateDate Database Date Date DocProperty DocVariable Eq	dddd, dd MIMIM yyyy 99/02/2005 Wednesday, 09 February 2 09 February 2005 09/02/05 2005-02-09 9-Feb-05 09 February 2005 February 2005 February 05 February 05 February 05 February 2005 12:44 09/02/2005 12:44 12:44 PM 12:44:14	Use the <u>H</u> jiri/Lunar calendar Insert the date in last used format from Insert menu Use the <u>S</u> aka Era calendar
escription: Today's date		✓ Preserve formatting during updates

- 4) From the **<u>F</u>ield names** list on the left choose *Date*.
- 5) From the list of **Date formats** in the middle choose a long date format like the one shown above.
- 6) Click **OK** when done. A date will be inserted as a field much like the fields that are used for table calculations. Since it is a field is will always stay current so the current date will always be displayed at the top of the letter.

Wednesday, 09 February 2005

Dear

As a valued customer, we could like to take this opportunity to thank-you for shopping with Nutty Net, the Internets leading online peanut sellers. We would also like to let you

## Exercise 3. Beginning a Mail Merge

- 1) From the <u>Tools</u> menu select <u>Letters</u> and <u>Mailings</u> and then select <u>Mail Merge</u>.
- The Mail Merge Task Pane will appear on the side of your screen like in the example below. This presents a step by step way of creating a mail merge.

	Protect Document		
	Online Collaboration		
	Letters and Mailings		Mail Merge
	Macro •		Show Mail Merge Toolbar
	Templates and Add-Ins	=1	Envelopes and Labels
Z	AutoCorrect Options		Letter Wizard
	Customize		
	Options		

3 • • • 2 • • • 1 • • • • • 1 • • • 2 • • • 3 • • • 4 • • • 5 • • • 6 • • • 7 • • 8 • • • 9 • • • 10 • • • 11 • • • 12 • • • 13		Mail Merge 🔹 👻
		🕲   🕲   🖀 ]
Wednesday, 09 February 2005 Dear As a valued customer, we could like to take this opportunity to thank-you for the with Nutty Net, the Internets leading online peanut sellers. We would also like know that we are moving to a new, bigger location in Perth's Central Business Our new premises will allow us to stock a greater variety of peanuts so that the more for you to choose from. The move will take place at the end of January. After that time, you will still be order from our website as normal, but postal orders will need to go to our new The new address will be: 49a Walnut Lane East Perth Western Australia		
6004 I		
www.nuttynet.com.au peanuts@nuttynet.com.au	✓ ± ⊙ ∓	Step 1 of 6  Next: Starting document

- 3) In the task pane, make sure Letters is selected under document type.
- 4) At the bottom of the task pane you will see **Step 1 of 6**. Click on the **Next: Starting document** link that is below that to move to the next step in the process.

The next step asks if you want to use the currently open document, create a new document from one of the built in templates or open an existing document.

5) Make sure the **Use the current document** option is selected and click on **Next: Select recipients**.

In the third step, you need to specify where the date for the mail merge will come from. In this case the data will contain the personal information that will go on each copy of the letter. You can use a list that you have already created, you can have the information taken from your Microsoft Outlook contacts list or you can create a new list.

0	Select Starting document
a	How do you want to set up your letters?
g	<ul> <li>Use the current document</li> </ul>
	Start from a template
	Start from existing document
Sele	ect recipients
۲	Use an existing list
0	Select from Outlook contacts
0	Type a new list
Use	an existing list
Us	e names and addresses from a file or a

Browse...
Edit recipient list...

database.

Folget starting day

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#### Mail Merge

6) Select the **Type a new list** option. You will now see a **Create** option underneath as shown to the right.

Type a new list
Type the names and addresses of recipients.
🛅 Create

7) Click on **Create**. A **New Address List** screen will appear which allows you to enter details in to a new list.

Enter Address information	1
Ţ	Title
First Na	ame
Last Na	ame
Company Na	ame
Address Lin	e 1
Address Lin	e 2
c	City
C+	
New Entry Delete I	Entry Eind Entry Filter and Sort Customize
Vie <u>w</u> Entry Number	First, Previous 1 Next, Last
Total entries in list	1

8) You may want to customise the available fields to suit your own information better. Click the **Customize** button. A list of the existing fields will appear.

Title	Add
First Name	
Last Name	Delete
Company Name	Cecca
Address Line 1 Address Line 2	Rename
Address Line 2 City	
State	
Country 43	
Home Phone	
Work Phone	Move U
E-mail Address	
	Move Dov

9) Click on **ZIP Code** in the list and then click on the **<u>Rename</u>** button.

3	🔊 👁 Re	name Field 🕘 🗇 🗙
	Change	field name
	From:	ZIP Code
	<u>T</u> o:	PostCode
		OK Cancel

- 10) Change ZIP Code to Post Code and click OK.
- 11) Repeat the above steps to change *City* to *Suburb*.
- 12) Click **OK** to return the **New Address List** window.

13) Enter the following details.

First Name	Richard
Last Name	Ashton
Address	302 Coode St
Suburb	Dianella
State	WA
Postcode	6059
Country	Australia

14) When all of this information has been entered, click <u>New Entry</u> to clear the form ready for another addition to the list.

15) Continue until each of the following people has been added to the list.

First		Company Name	State	Country	Post	Address	Suburb
Name	Name				Code		
Richard	Ashton		WA	Australia	6059	302 Coode St	Dianella
Anne	Cambridge		WA	Australia	6060	83 Wordsworth Ave	Yokine
		Nuts and Bolts Hardware	WA	Australia	6010	340 Stirling Highway	Claremont
Robert	Smith	Bob's Building Co.	WA	Australia	6237	RMB 175 Minninup	Stratham
Amy	Clayton			New Zealand		22 Taupiri St	Te Kuiti
David	Armstrong		WA	Australia	6432	10 Minchin Mews	Kalgoorlie
		Cyber Sandwiches Internet Cafe	WA	Australia	6003	111 James St	Northbridge
Judith	Court		VIC	Australia	3030	32 May Ave	Chartwell
		Peanut Butter Perfection	WI	USA	54915	W6072 Blazing Star Dr	Appleton
Adrian	Everett		WA	Australia	6069	18 Angophora Ave	Ellenbrook

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16) After you have entered the last of the addresses, click the **Close** button. You will be prompted to save the data file (which will save the details in a Microsoft Access file format).

?	🔊 🔊 Save Add	ress List						$\odot \times$
	Save in:	Exercises	;	٩	🔁 🔍 🛛	🔛 💷	Too <u>l</u> s <del>-</del>	
	My Recent Documents							
	Desktop							
	My Documents							
	My Computer							
	My Network	File <u>n</u> ame:	Nutty Addresses	5		٥	Save	
	Places	Save as type:	Microsoft Office	Address Lists (*.m	db)	٥	Can	cel 📃

- 17) For the filename enter *Nutty Addresses* and choose the same location as your other files. Click **Save** when ready.
- 18) You will now have a screen which allows you to review, edit or omit names in the list. Click **Ok** to close this list and return to the Mail Merge steps.

	f recipients:	First Na	▼ T	Company Na	Address Lin
~	Ashton	Richard	Î	Î	302 Coode St
7	Cambridge	Anne			83 Wordsworth A
				Nuts and Bolts hard	340 Stirling Highw
✓ ✓	Smith	Robert		Bob's Building Co	RMB 175 Minninud
	Clayton	Amy			22 Taupiri St
~	Armstrong	David			10 Minchin Mews
~				Cyber Sandwiches i	111 James St
<u> </u>	Court	Juduth			32 May Ave
~				Peanut Butter Perfe	W6072 Blazing St
~	Everett	Adrian			18 Angophora Av

19) Click Next: Write your letter to move to the next step.

Since our letter has already been written, we only need to add in the merge fields.

#### Step 3 of 6

- Next: Write your letter
- Previous: Starting document

#### Mail Merge

In older versions of Word, something like an address would have been added one field at a time like in the example below. In current versions it is still possible to select fields one by one but there are easier ways. Some preset collections of fields are available from the task pane on the right.

Friday, 11 February 2005	To add recipient information to your letter, click a location in the document, and then click one of the items below.
«First_Name» «Last_Name» «Address_Line_1» «Suburb»«State»«Post_Code» «Country»	Address block Greeting line Electronic postage More items
Dear	

- 20) Click on the blank line between the date and the *Dear* line. This is where we will place the address for each person.
- 21) From the task pane on the right, click on Address Block.

🖲 🕭 Insert Address Block
Specify address elements
✓ Insert <u>r</u> ecipient's name in this format:
Joshua Joshua Randall Jr. Joshua Q. Randall Jr. Mr. Josh Randall Jr. Mr. Josh Q. Randall Jr.
Mr. Joshua Randall Jr.
✓ Insert postal address:
<ul> <li>Never include the country/region in the address</li> <li>Always include the country/region in the address</li> <li>Only include the country/region if different than:</li> </ul>
Australia
Format address according to the destination country/region
Blue Sky Airlines, Mr. Joshua Randall Jr. 1 Airport Way Kitty Hawk NC 27700 United States of America
Match Fields OK Cancel

The top section allows you to choose how the person's name will appear in the address block and whether or not you will include company name (if the address includes one). There is also an option to only include the country in the address is if it an overseas address. One of the great things about the address block feature is that it doesn't leave blank lines for fields that are blank. Everything is kept together nice and neatly. One problem is that if you have customised the fields in the earlier step then Word may not recognise them to include them in an address block.

22) Click the  $\underline{M}$  atch Fields button.

Mail Merge has special features for easily working with addresses. Use the drop-down list to select the proper database field for each address field component.         Required information         Last Name         First Name         First Name         Courtesy Title         Company         Address 1         Address 1         Address 1         State         Postal Code         Spouse First Name         Middle Name         cuffx         Use the drop-down lists to choose the field from your database         Address Line 1         Address Ine 2         Address Eine 2         State         Code         Coptional information         Middle Name         Company Name         Address Line 1         Value         Value	🗴 Match Fields	O	
Last Name Last Name First Name First Name Courtesy Title Company Address 1 City State Postal Code Spouse First Name Middle Name Cuffy Use the drop-down lists to choose the field from your database Address Line 1 the			own list
First Name       First Name         Courtesy Title       Title         Company       Company Name         Address 1       Address Line 1         City       Suburb         State       State         Postal Code       Post Code         Spouse First Name       Title         Middle Name       Last Name         Suffx       Company Name         Use the drop-down lists to choose the field from your database       Address Line 1	Required information		~
Courtesy Title Title  Company Name  Address 1 City State Postal Code Spouse First Name Middle Name Suffix Use the drop-down lists to choose the field from your database Address Line 1 the	Last Name	Last Name	-
Company Name  Address 1 City State Postal Code Spouse First Name Middle Name Use the drop-down lists to choose the field from your database Address Line 1 the	First Name	First Name	• - I
Address 1 Address Line 1  City Suburb  State  Postal Code  Spouse First Name  Middle Name  Company Name  Use the drop-down lists to choose the field from your database Address Line 1  the	Courtesy Title	Title	•
City Suburb State State Postal Code Spouse First Name Optional information Middle Name Suffar Use the drop-down lists to choose the field from your database Address Line 1 the	Company	Company Name	-
State Postal Code Spouse First Name Optional information Middle Name Suffer Use the drop-down lists to choose the field from your database Address Line 1 the	Address 1	Address Line 1	
Postal Code  Post Code  Spouse First Name  Optional information  Middle Name  Cuffw  Use the drop-down lists to choose the field from your database  Address Line 1  the	City	Suburb	<b>-</b>
Spouse First Name <b>Optional information</b> Middle Name Suffer Use the drop-down lists to choose the field from your database Address Line 1 0 the	State	State	<b>-</b>
Spouse First Name Title   Optional information  Middle Name  Last Name  Company Name  Use the drop-down lists to choose the field from your database  Address Line 1  the	Postal Code	Post Code	T N
Middle Name     Last Name       Suffix     Company Name       Use the drop-down lists to choose the field from your database     Address Line 1	Spouse First Name	Title	
Use the drop-down lists to choose the field from your database Address Line 1 the	Optional information	First Name	
Use the drop-down lists to choose the field from your database Address Line 1 the	Middle Name	Last Name	
Use the drop-down lists to choose the field from your database Address Line 1 the address information Mail Merge expects (listed on the left.) Address Line 2	Suffix	Company Name	
address information Mail Merge expects (listed on the left.) Address Line 2	Use the drop-down lists to choose the field from your database	Address Line 1	o the
	address information Mail Merge expects (listed on the left.)	Address Line 2	
			cel
Ce Ce		Post Code	

- 23) You may find that fields you have renamed such as Post Code and Suburb may not be matched up to any address component. Use the drop down lists to make sure that *Suburb* is matched up with **City** (on the left) and *Post Code* is matched up with **Postal Code**.
- 24) Click **OK** when done and then click **OK** again to complete the address block.
- 25) Delete the word *Dear*. We will put an automatic greeting line including the recipient's name in its place..
- 26) In the task pane on the right, click Greeting Line.

Greeting line format:		
Dear 🔿 Mr	, Randall	• , •
Greeting line for invalid recipient n	ames:	
Dear Sir or Madam,	٥	
Preview		
Dear Mr. Randall,		

27) Check that the format for the greeting line is suitable (maybe view some of the different options) and click **OK** to insert the greeting line. The completed letter should show fields like in the example below.

Friday, 11 February 2005
«AddressBlock»
«GreetingLine»
As a valued customer, we could like to take this opportunity to thank-you for s with Nutty Net, the Internets leading online peanut sellers. We would also like

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28) Now let's see if it all works. Click on **Next: Preview your letters** to move on to step 5. The fields on your letter will now be replaced with details from one of your addresses.

Friday, 11 February 2005

Cyber Sandwiches internet Cafe,

111 James St Northbridge WA 6003

Dear Sir or Madam,

As a valued customer, we could like to take this opportunity to thank-you for with Nutty Net, the Internets leading online peanut sellers. We would also lik

29) Click the Previous << and Next >> buttons in the Task Pane to view the different addresses in the letter.

If you wanted to print one copy of the letter for a specific person, you could simply select the right address and then print while that address was showing.

Preview your letters
One of the merged letters is previewed here. To preview another letter, click one of the following:
<pre>Recipient: 1 &gt;&gt;</pre>
🖳 Find a recipient

30) Save the document and leave it open.

**Note** when you have created a mail merge document, the mail merge toolbar will often appear (as shown below). In the middle of that toolbar are buttons for moving through the different address records. You can also type the number of a record (record number 8 in the list for example) and then press **[Enter]** to move straight to it.

🛛 🔄 💕 🖹 📄 🗐 Insert Word Field 🕶 🎉 🗟 🖏 🖉 🛛 🚺 🔺 10 🔹 🕨 🔩 😓 🎭

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### Exercise 4. Completing the Merge

- Make sure the Mail Merge task pane is still showing on the right side of the screen. If it isn't, go to the <u>T</u>ools menu and select Letters and Mailings → <u>M</u>ail Merge.
- 2) From the task pane click on Next: Complete the merge.

The task pane will now show two options. The first option will print copies of the letter for each address in the address list you created. The second option will create a new document with each copy of the letter beginning on a new page so you can edit/review them before printing. Similar options are also available on the **Mail Merge** toolbar if it is showing.

3) Click the second option, Edit individual letters.

5	🖲 🖲 Merge to New D 🕘 🗊 🗙
	Merge records
I	○ Curr <u>e</u> nt record
I	○ <u>F</u> rom: <u>T</u> o:
	OK Cancel

 Step 5 of 6

 Mail

 Next: Complete the merge

 Previous: Write your letter

Complete the merge
Mail Merge is ready to produce your letters.

To personalize your letters, click "Edit Individual Letters." This will open a new document with your merged letters. To make changes to all the letters, switch back to the original document.

М	erge	

2	Print
Ð	Edit individual letters.

- 4) The Merge to New Document dialog will allow you to specify which records will be included in the new document. Leave the <u>All</u> option selected and click OK.
- 5) A new document with a copy of the letter for each person will be created. Scroll through the document to review each copy of the letter.
- 6) Save the document as *Merged Letters* and then close it.
- 7) Save and close the original *Mail Merge Letter* document.
- **Note** You can use mail merge to quickly print addresses on mailing labels. Sheets of labels in standard sizes can be bought from most news agents and stationery stores and are supported in Microsoft Word. If you have a printer that can print on envelopes you can also use mail merge to print addresses directly on the envelopes for a professional look.

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