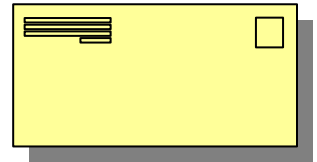




Using Microsoft Word

Mail Merge

Mail Merge is 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, though the general concepts are the same in older versions.

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 in the text).

<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@nutty.net.com.au

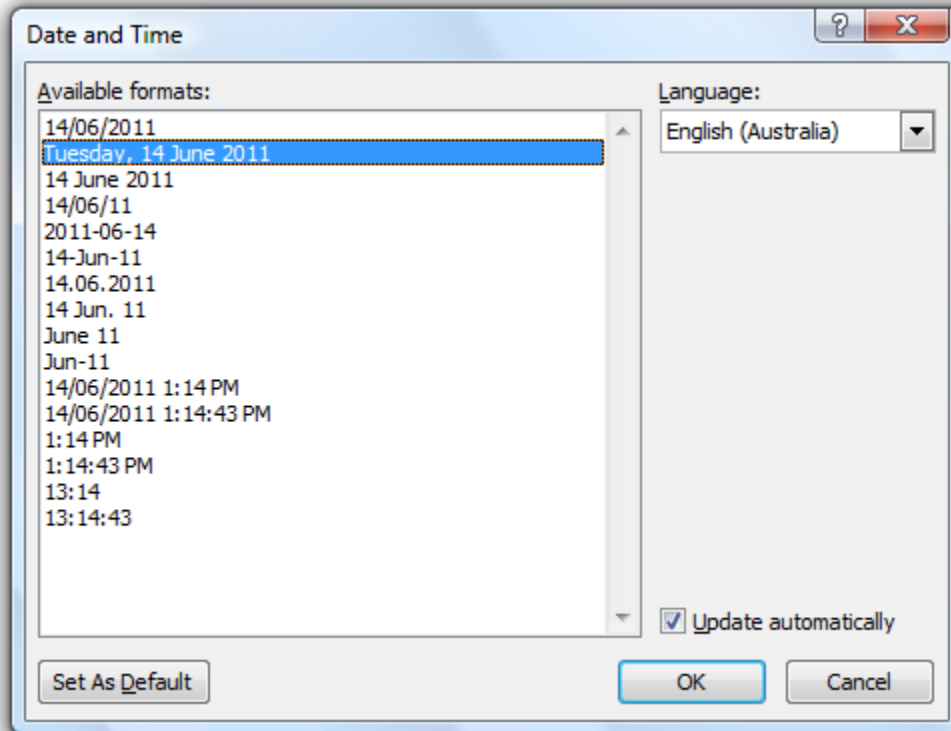
Feel free to visit our website and browse through our catalog to see the new aditions that the new larger premise will allow us to add to our range of peanuts. We look forward to continuing to serve your nutty needs.

The Manager

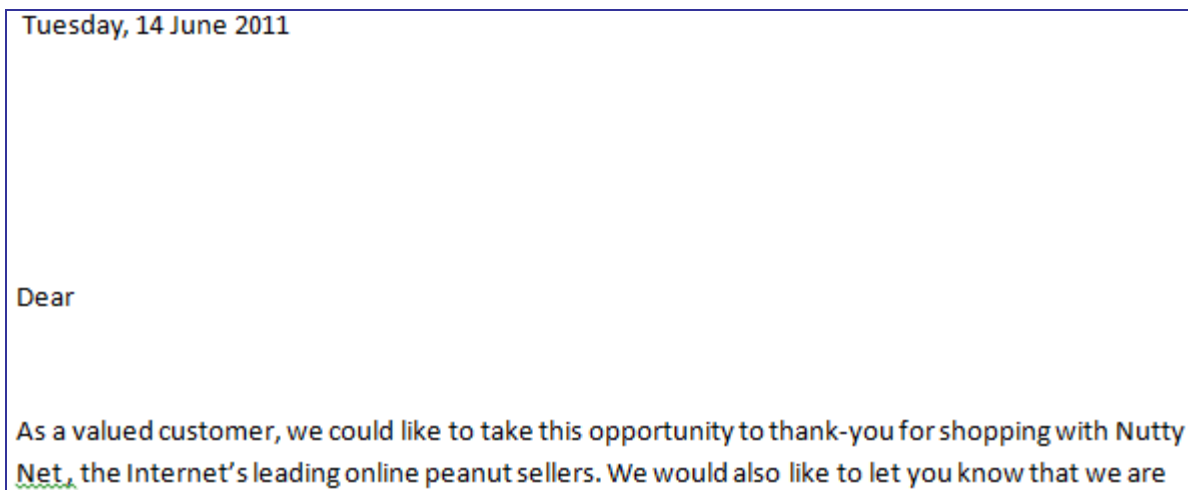
Nutty Net

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** tab on the ribbon click the Date & Time icon.  Date & Time



- 4) From the list of **Available formats** choose a long date format like the one shown above.
- 5) 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 it will always stay current so the current date will always be displayed at the top of the letter.





Exercise 3. Beginning a Mail Merge

- 1) Select the **Mailings** tab from the **Ribbon**.



- 2) Click the Start Mail Merge icon to show a list of mail merge types.
- 3) From the list choose **L**etters.



The first thing we need to do is decide where the names and addresses for each copy of the letter will come from. You can import the details from an existing source (such as a customer details database in **Microsoft Access** or from contacts in **Microsoft Outlook**). For this exercise we will create a new list to use as the source.

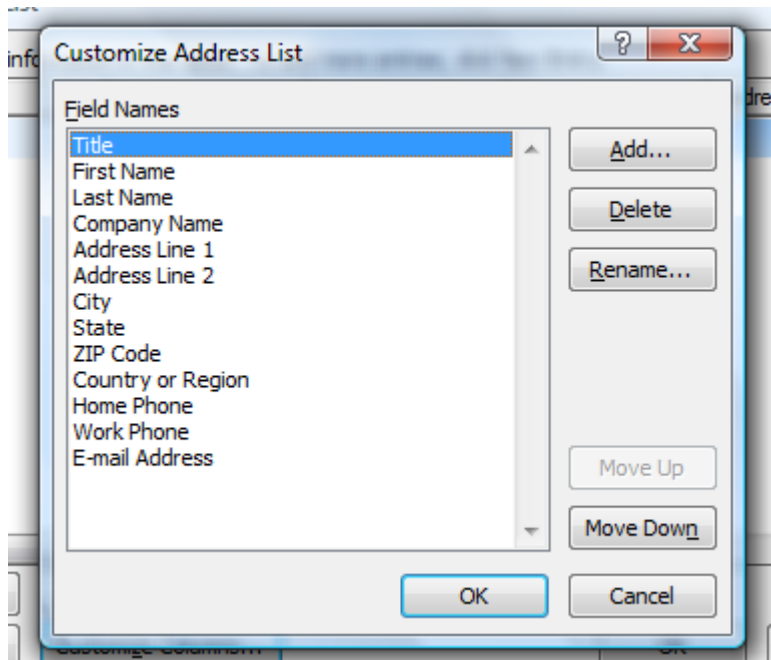
- 4) Click the Select Recipients icon.



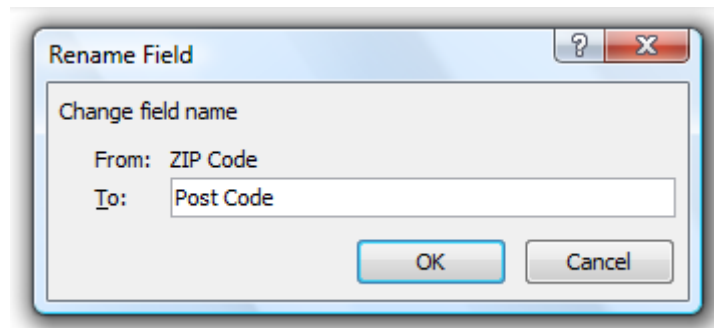
- 5) From the list of options choose **T**ype **N**ew List...

Title	First Name	Last Name	Company Name	Address Line 1

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



7) Click on **ZIP Code** in the list and then click on the **Rename** button.



8) Change *ZIP Code* to *Post Code* and click **OK**.

9) Repeat the above steps to change *City* to *Suburb*.

10) Click on the *Title* field and click on the **Delete** button since we won't be using it for this exercise.

11) Click on the *Post Code* field and then click **Move Up** so that it is above the State field.

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 **New Entry** 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.

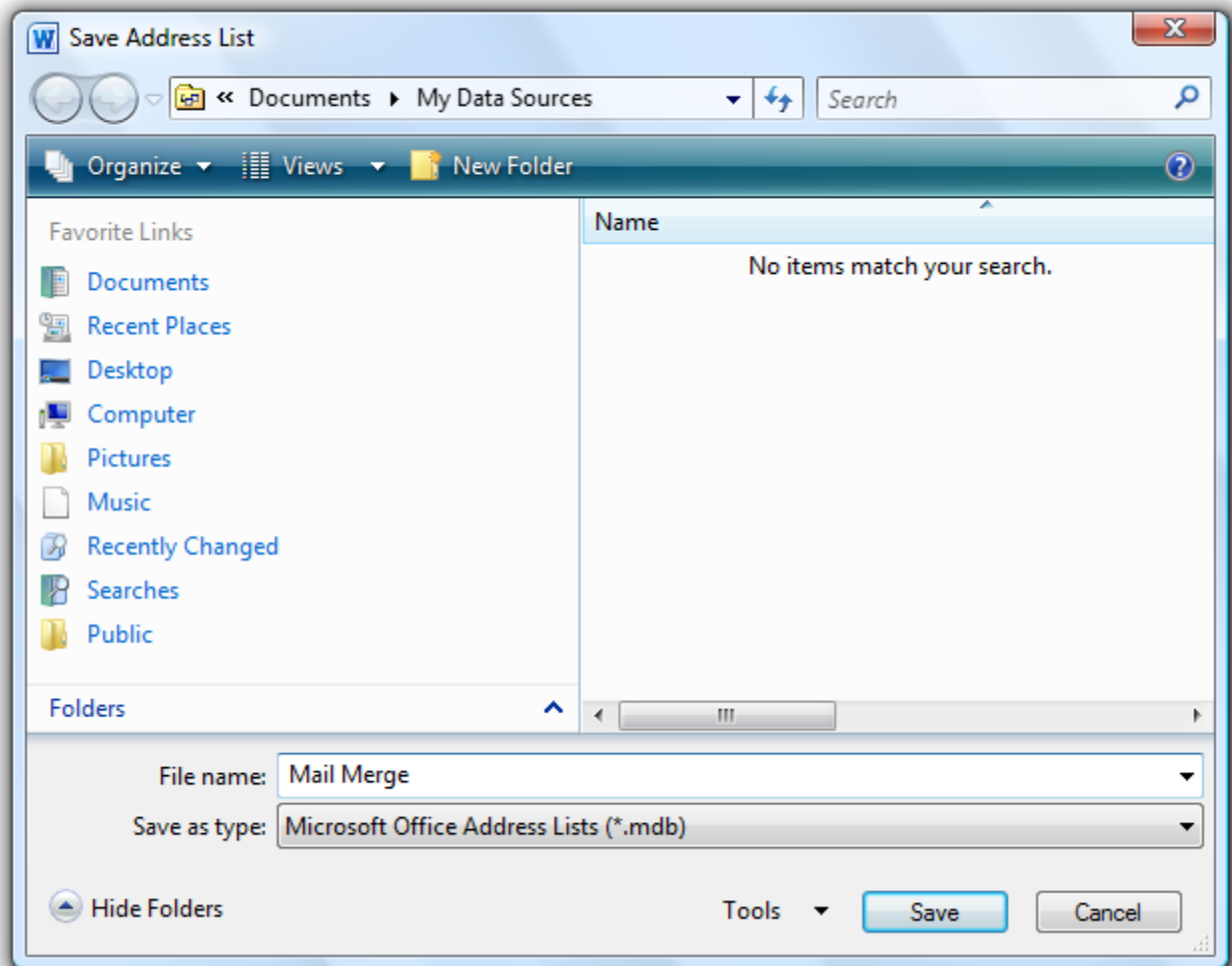
Edit Data Source

To edit items in your data source, type your changes in the table below. Column headings display fields from your data source and any recipient list fields to which they have been matched (in parentheses).

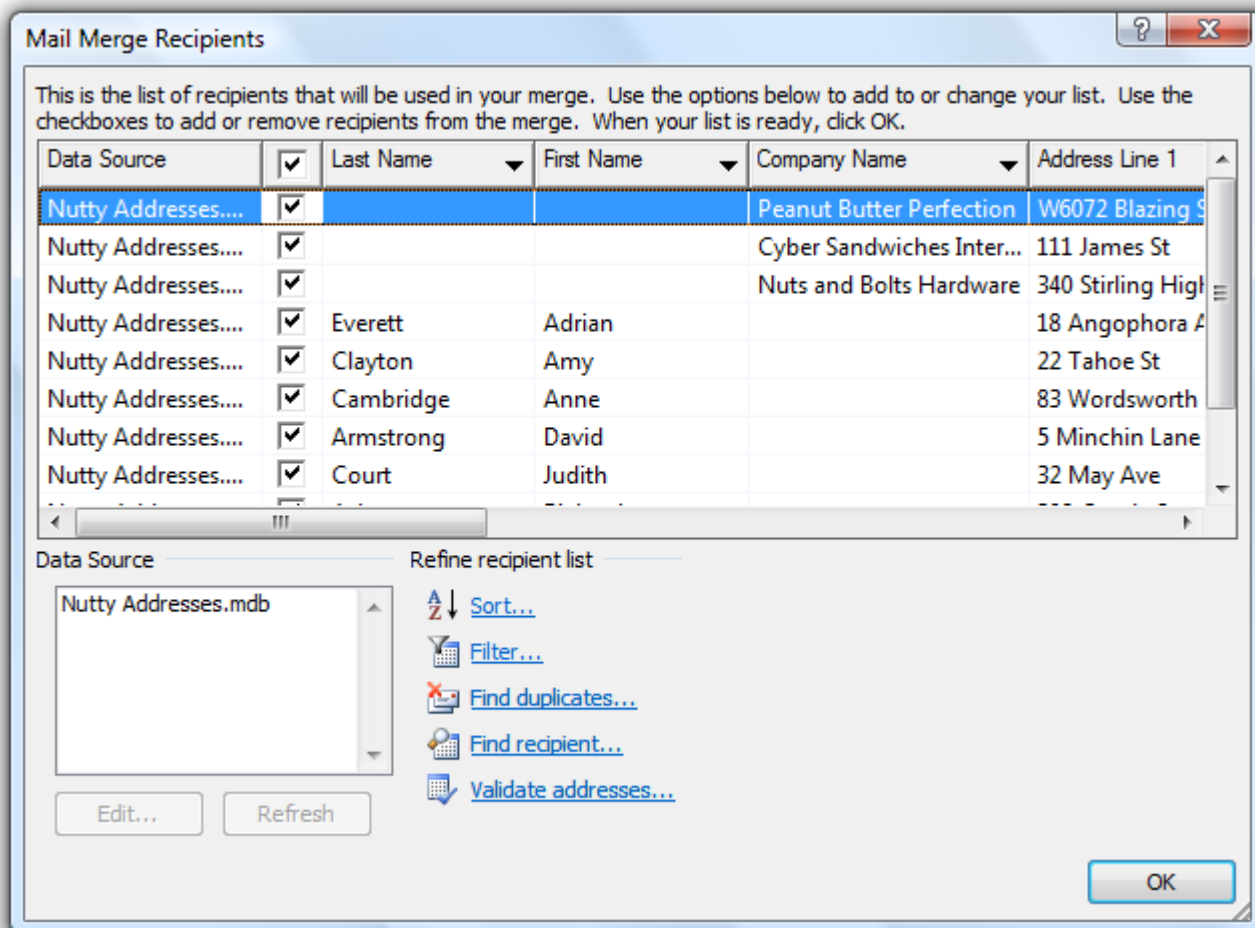
Data source being edited: Nutty Addresses.mdb

	First Name ▾	Last Name ▾	Company Name ▾	Address Line 1 ▾	Addr... ▾	Suburb ▾	Post Code ▾	State ▾	Country o... ▾	Home
▶	Richard	Ashton		302 Coode St		Dianella	6059	WA	Australia	
	Anne	Cambridge		83 Wordsworth ...		Yokine	6060	WA	Australia	
			Nuts and Bolts Hardware	340 Stirling Hig...		Claremont	6010	WA	Australia	
	Robert	Smith	Bob's Building Co.	50 Hannan St		Kalgoorlie	6430	WA	Australia	
	Amy	Clayton		22 Tahoe St		Te Kuiti			New Zealand	
	David	Armstrong		5 Minchin Lane		Boulder	6432	WA	Australia	
			Cyber Sandwiches Internet Cafe	111 James St		Northbridge	6003	WA	Australia	
	Judith	Court		32 May Ave		Chartwell	3030	VIC	Australia	
			Peanut Butter Perfection	W6072 Blazing ...		Appleton	54915	WI	USA	
	Adrian	Everett		18 Angophora ...		Ellenbrook	6069	WA	Australia	

- 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).



- 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.

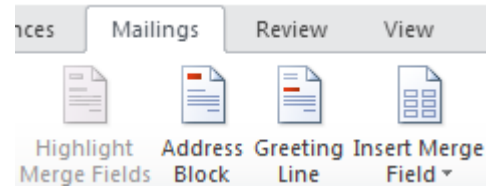


In older versions of Word, something like an address would have been added one field at a time like in the example below. In current versions it is still possible to select fields one by one but there are easier ways. Some preset collections of fields are available from the ribbon icons.

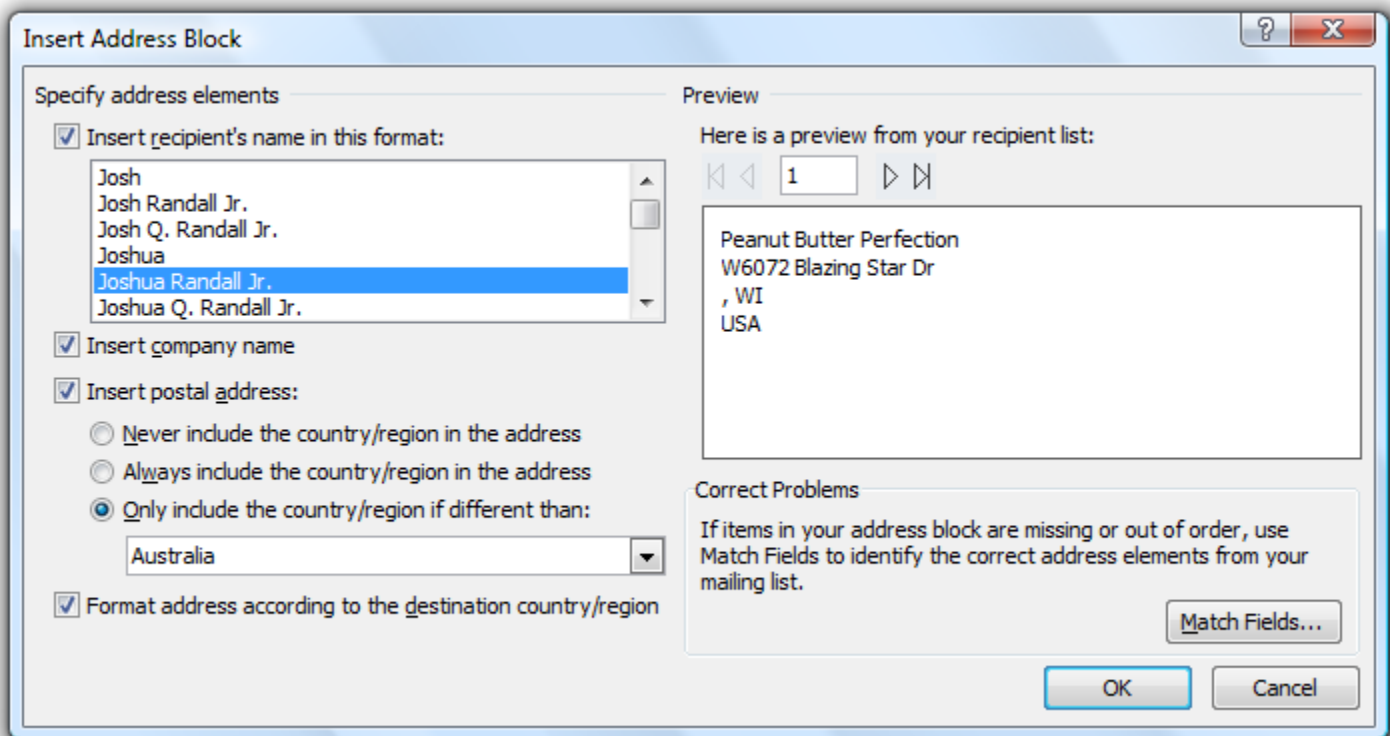
Friday, 11 February 2005

«First_Name» «Last_Name»
 «Address_Line_1»
 «Suburb»«State»«Post_Code»
 «Country»

Dear |



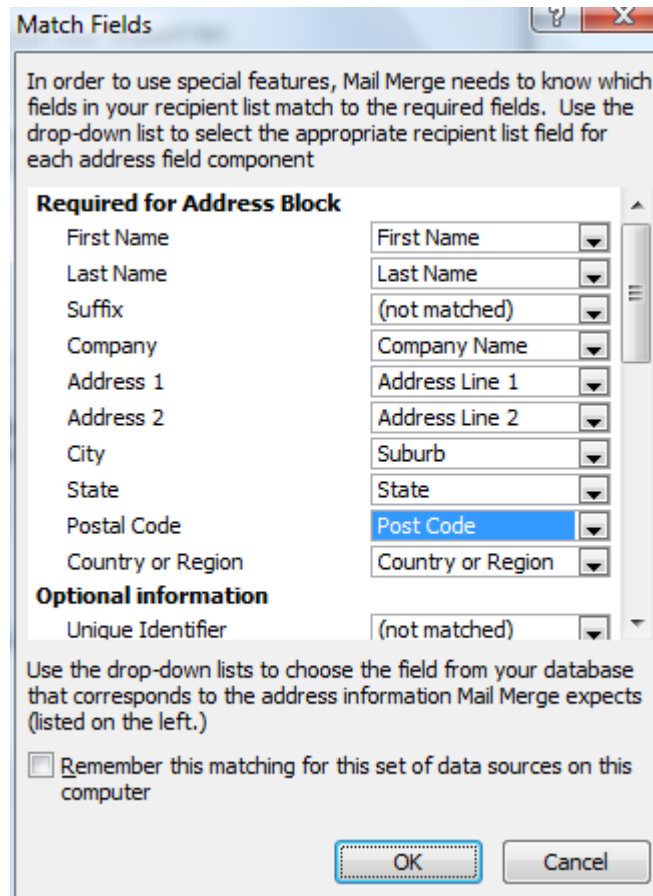
- 19) Click on the blank line between the date and the *Dear* line. This is where we will place the address for each person.
- 20) Click on the **Address Block** icon.



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.

21) Click the **Match Fields** button.

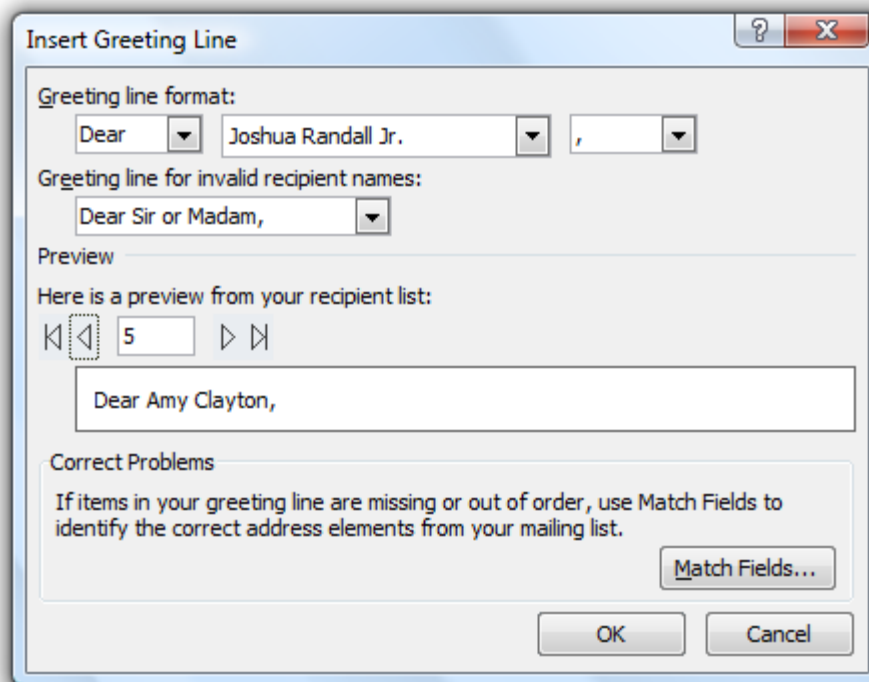
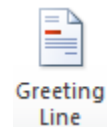


22) You may find that fields you have renamed such as Post Code and Suburb may not be matched up to any address component. Use the drop down lists to make sure that *Suburb* is matched up with **City** (on the left) and *Post Code* is matched up with **Postal Code**.

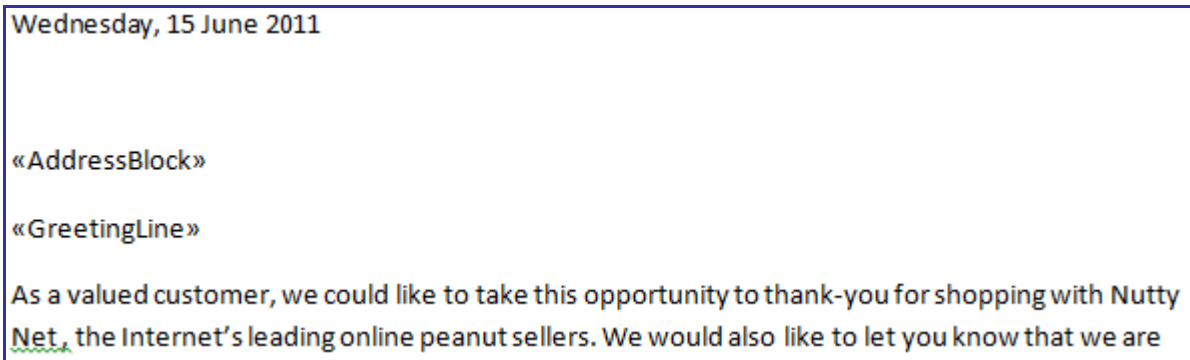
23) Click **OK** when done and then click **OK** again to complete the address block.

24) Delete the word *Dear*. We will put an automatic greeting line including the recipient's name in its place..

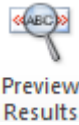
25) Click on the **Greeting Line** icon.



26) Check that the format for the greeting line is suitable (you can click the arrows above the preview to see how it looks with some of your addresses) and click **OK** to insert the greeting line. The completed letter should show fields like in the example below.



27) Now let's see if it all works. Click the **Preview Results** icon. The fields on your letter will now be replaced with details from one of your addresses (You might want to select the address block and adjust the paragraph options so there isn't too much space between the lines in the address).



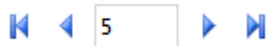
Wednesday, 15 June 2011

Amy Clayton
22 Tahoe St
Te Kuiti
New Zealand

Dear Amy Clayton,

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

28) Click the **Previous** ◀ and **Next** ▶ buttons in the ribbon to view the different addresses in the letter. You can also type a number in the middle and press **[Enter]** to move to that record (E.g. typing 5 and pressing **[Enter]** would show the 5th record).

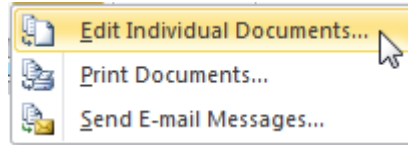


If you wanted to print one copy of the letter for a specific person, you could simply select the right address and then print while that address was showing.

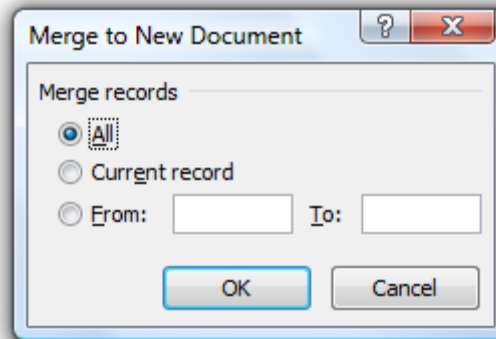
29) Save the document and leave it open.

Exercise 4. Completing the Merge

- 1) Make sure the **Mailings** tab is still showing on the ribbon.
- 2) From the ribbon click on the **Finish & merge** icon.
- 3) A menu will appear under the icon. From the menu click on **Edit Individual Documents**.



- 4) The **Merge to New Document** dialog will allow you to specify which records will be included in the new document. Leave the **All** 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.