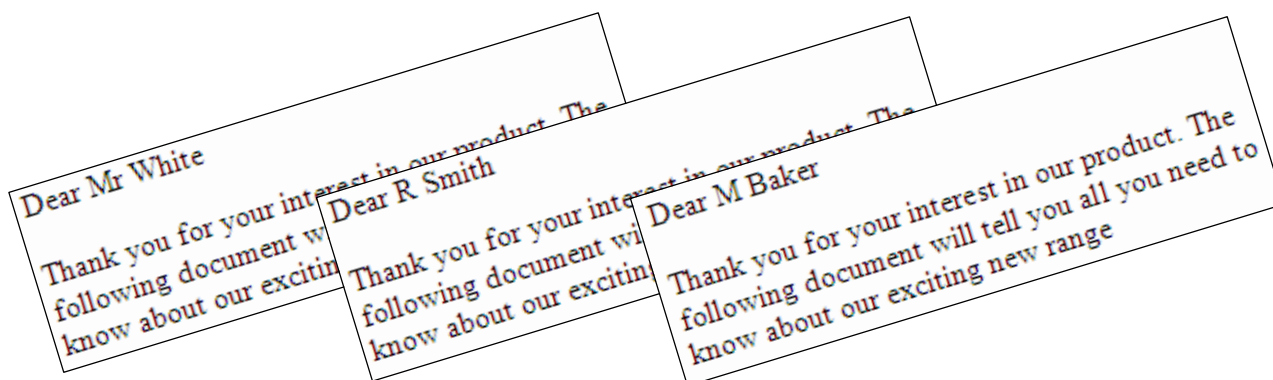
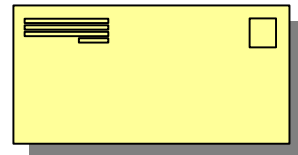


Using Microsoft Word

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. 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.

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 would 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

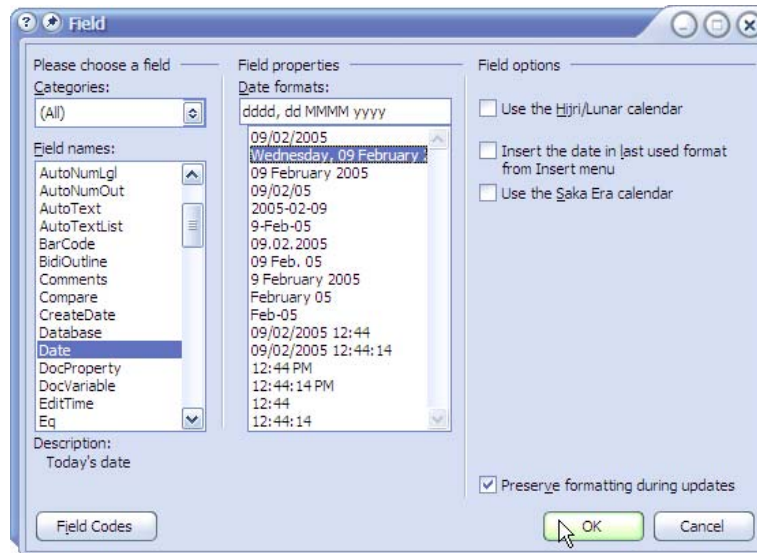
Feel free to visit our website and browse through our catalog to see the new additions that the new larger premise will allow us to add to our range of peanuts. We look forward to continuing to serve your nutty needs.

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** menu select **Field**.



- 4) From the **Field 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 it will always stay current so the current date will always be displayed at the top of the letter.

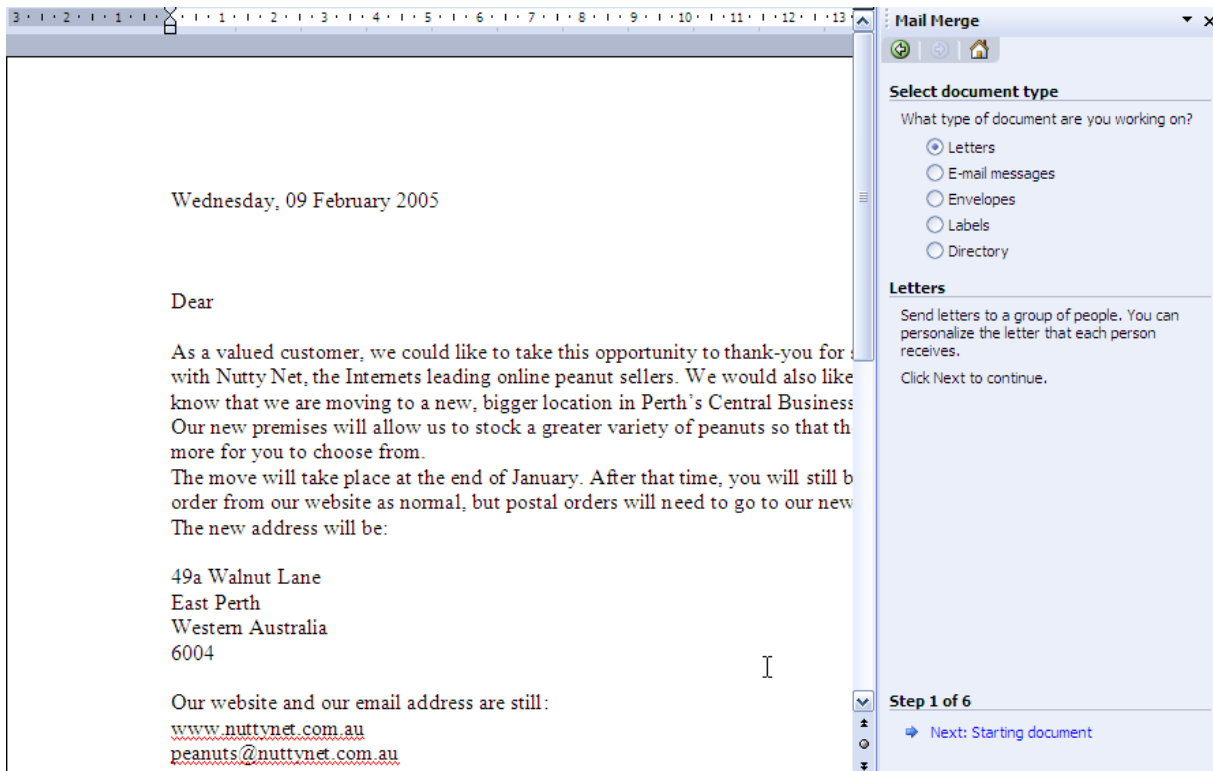
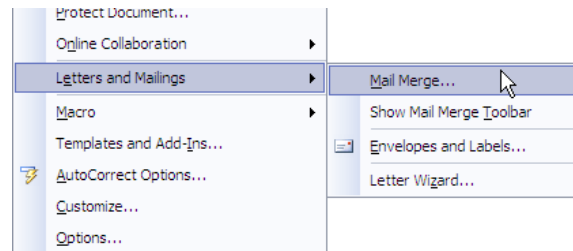
Wednesday, 09 February 2005

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 **Tools** menu select **Letters and Mailings** and then select **Mail Merge**.
- 2) 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.

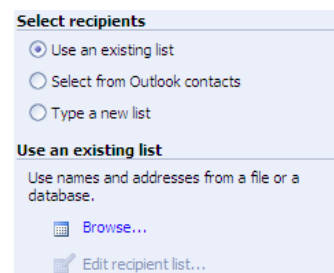
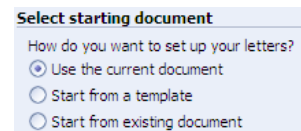


- 3) In the task pane, make sure **Letters** is selected under **document type**.
- 4) At the bottom of the task pane you will see **Step 1 of 6**. Click on the **Next: Starting document** link that is below that to move to the next step in the process.

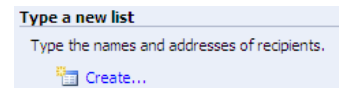
The next step asks if you want to use the currently open document, create a new document from one of the built in templates or open an existing document.

- 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.



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



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

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.

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

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.

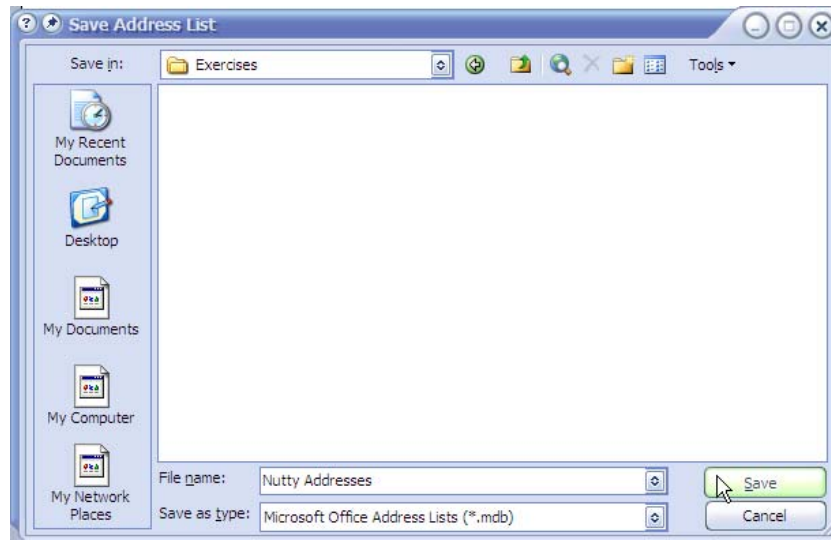
First Name Richard
Last Name Ashton
Address 302 Coode St
Suburb Dianella
State WA
Postcode 6059
Country Australia

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

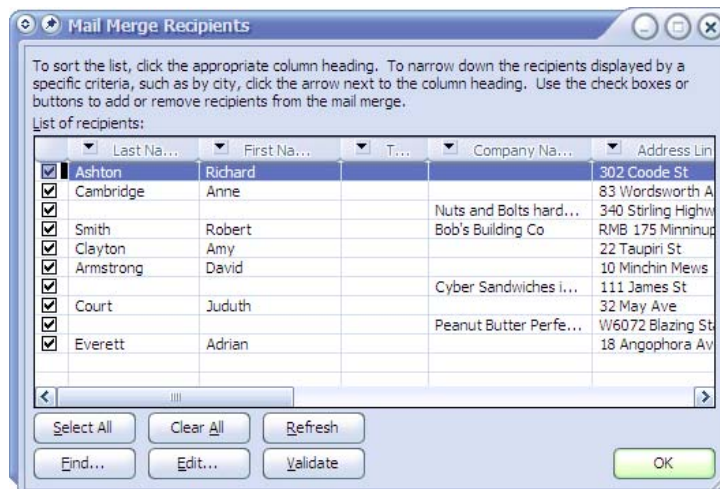
15) Continue until each of the following people has been added to the list.

First Name	Last Name	Company Name	State	Country	Post Code	Address	Suburb
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

- 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.



- 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





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

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

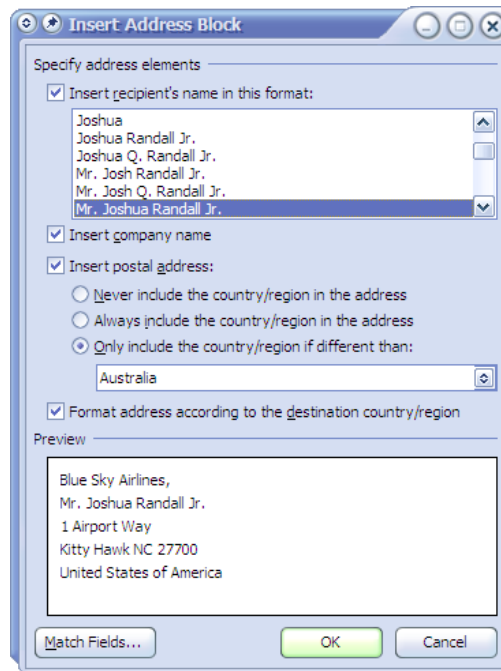
Dear |

To add recipient information to your letter, click a location in the document, and then click one of the items below.

-  Address block...
-  Greeting line...
-  Electronic postage...
-  More items...

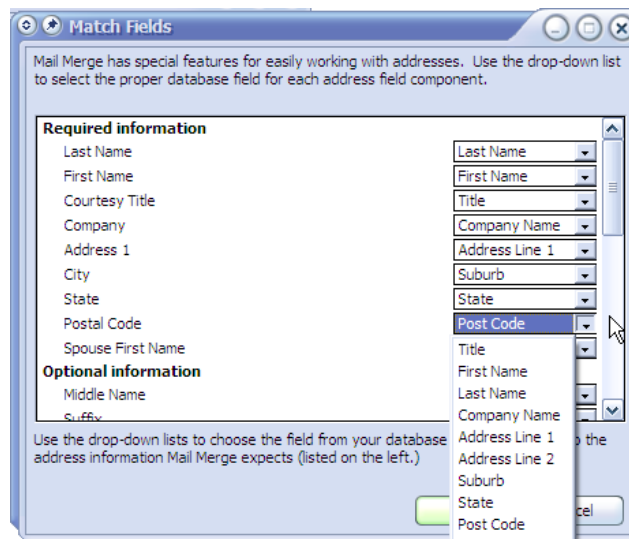
20) Click on the blank line between the date and the *Dear* line. This is where we will place the address for each person.

21) From the task pane on the right, click on **Address Block**.

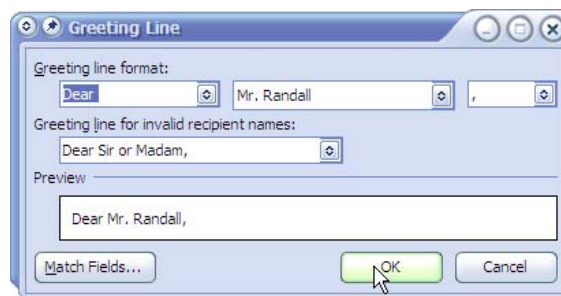


The top section allows you to choose how the person's name will appear in the address block and whether or not you will include company name (if the address includes one). There is also an option to only include the country in the address if it an overseas address. One of the great things about the address 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.

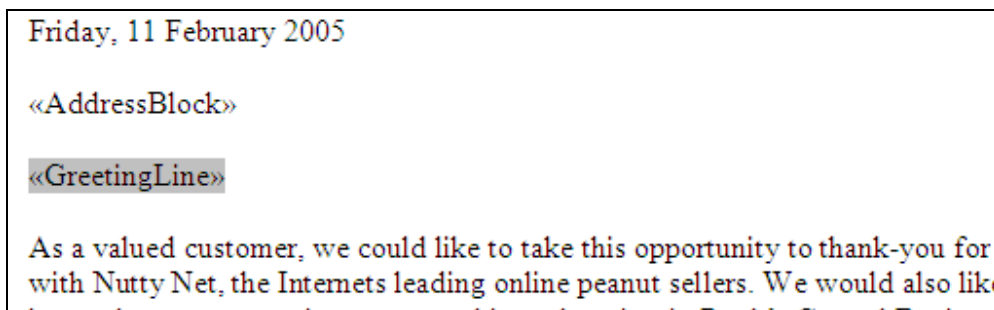
22) Click the **Match Fields** button.



- 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**.



- 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.



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

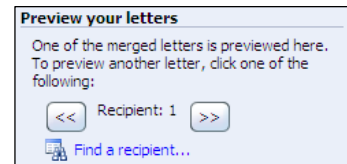
Dear Sir or Madam,

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.

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.



Exercise 4. Completing the Merge

- 1) Make sure the **Mail Merge** task pane is still showing on the right side of the screen. If it isn't, go to the **Tools** menu and select **Letters and Mailings** → **Mail Merge**.

Step 5 of 6

- ➔ Next: Complete the merge
- ➔ Previous: Write your letter

- 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.

Complete the merge

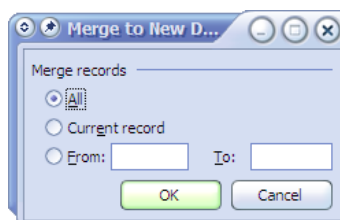
Mail Merge is ready to produce your letters.

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.

Merge

- Print...
- Edit individual letters...

- 3) Click the second option, **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 **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.