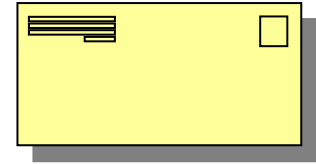




Using Microsoft Word

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@nuttnet.com.au

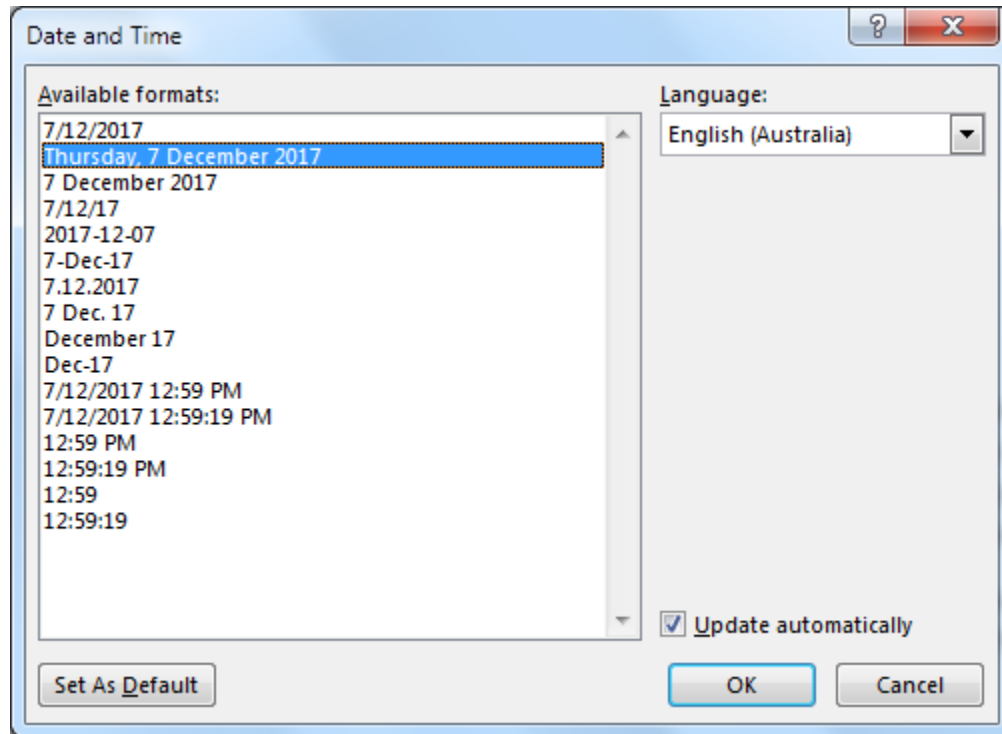
Feel free to visit our website and browse through our catalog to see the new aditions that the new larger premise will allow us to add to our range of peanuts. We look forward to continuing to serve your nutty needs.

The Manager

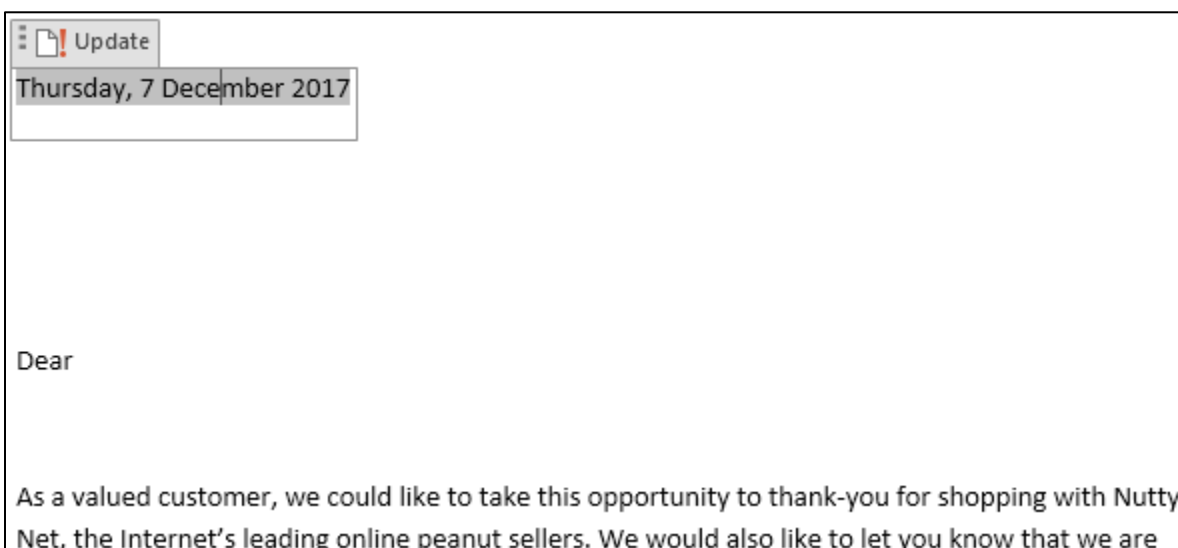
Nutty Net

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  in the **Text** group.



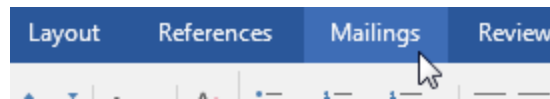
- 4) From the list of **Available formats** choose a long date format like the one shown above and make sure **Update automatically** is ticked.
- 5) Click **OK** when done. A date will be inserted as a field much like the fields that are used for table calculations. Since it is a field it will always 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 **Letters**.



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 **Type a New List...**

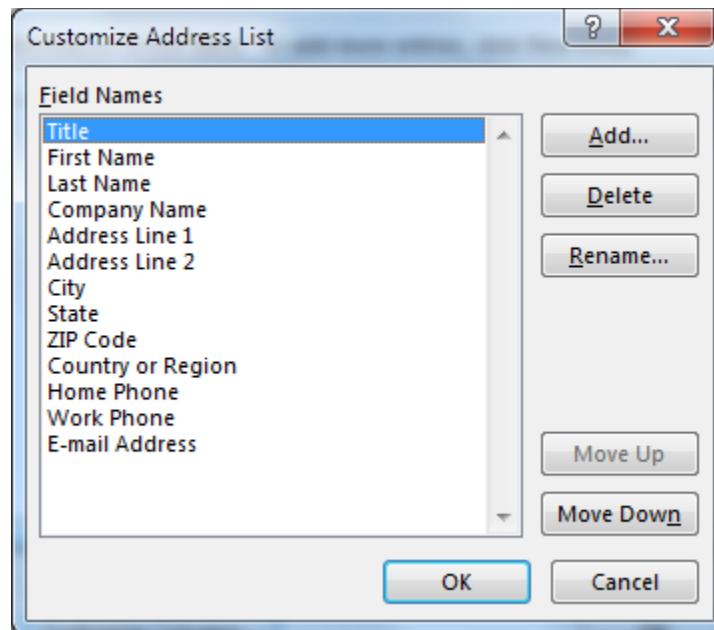


New Address List

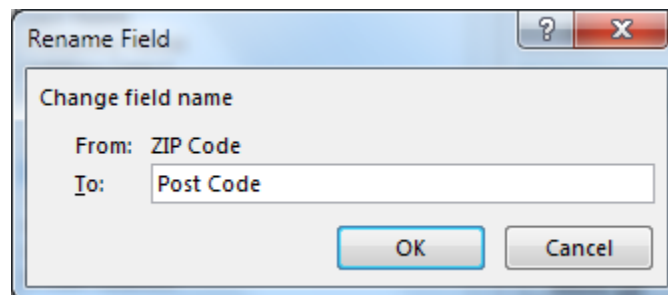
Type recipient information in the table. To add more entries, click New Entry.

	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.

First Name	Last Name	Company Name	Address Line 1	Address L...	Suburb	Post Code	State	Country or Re...
Richard	Ashton		302 Coode St		Dianella	6059	WA	Australia
Anne	Cambridge		83 Wordsworth Ave		Yokine	6060	WA	Australia
		Nuts and Bolts Hardware	340 Stirling Highway		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 Road		Appleton	54915	WI	USA
Adrian	Everett		18 Angophora St		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).

File name: Nuttly Addresses
 Save as type: Microsoft Office Address Lists (*.mdb)
 Save Cancel

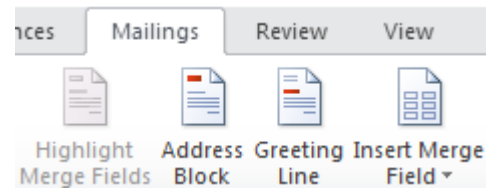
17) For the filename enter *Nuttly Addresses* and choose the same location as your other files. Click **Save** when ready.

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 |

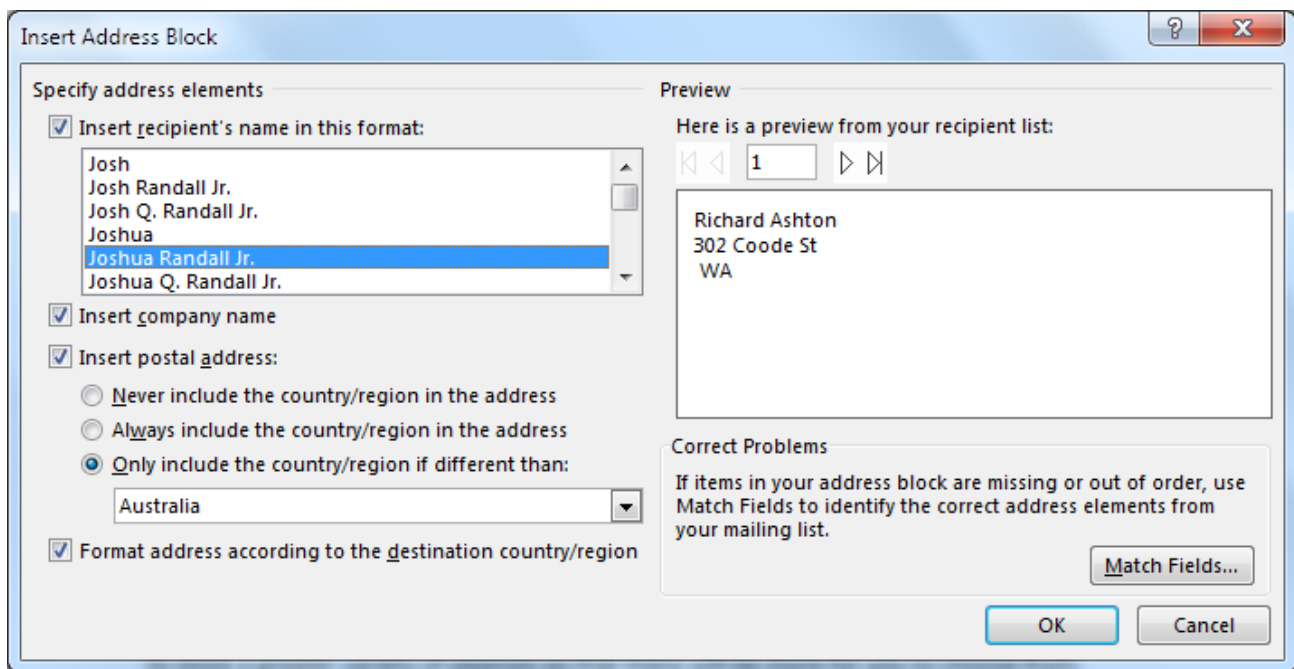


18) Click on the blank line between the date and the *Dear* line. This is where we will place the address for each person.



Address Block

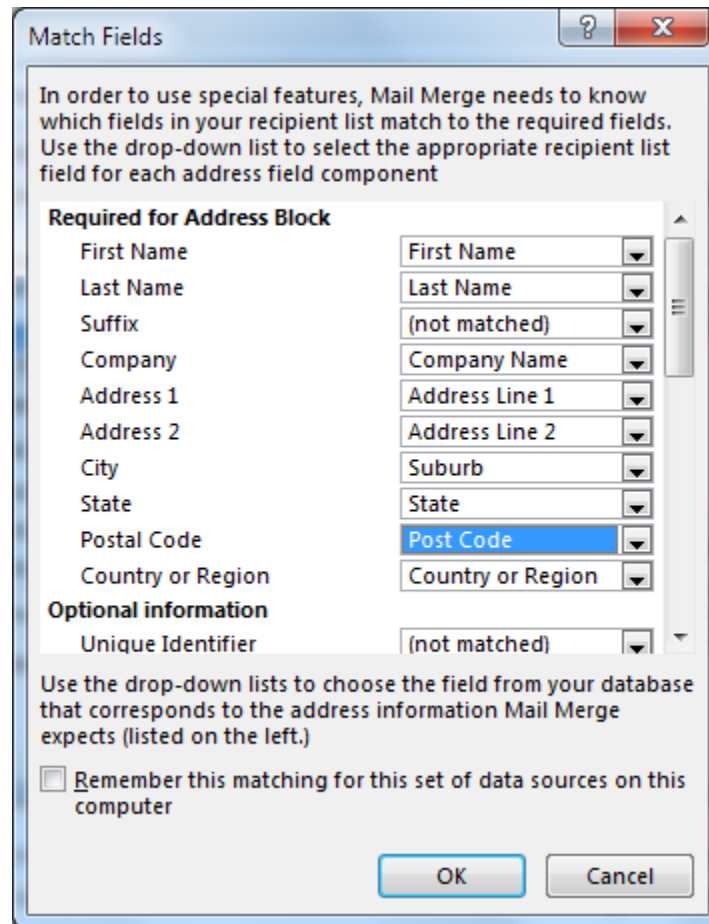
19) Click on the **Address Block** icon.



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 small 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.

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



21) 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**.

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

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

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



Greeting Line

25) 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.

Thursday, 7 December 2017

«AddressBlock»

«GreetingLine»

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

26) 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).



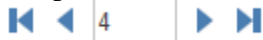
Thursday, 7 December 2017

Bob's Building Co
Robert Smith
50 Hannan St
Kalgoorlie WA 6430

Dear Robert Smith,

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

27) 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 4 and pressing **[Enter]** would show the 4th record).

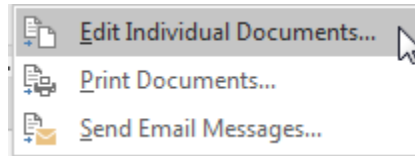


If you wanted to print one copy of the letter for a specific person, you could simply select the right address and then print while that address was showing.

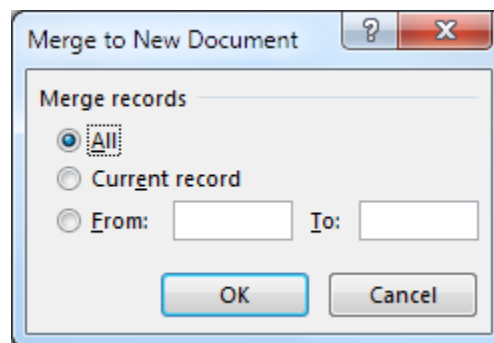
28) Save the document and leave it open.

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.