

Mail Merge Workshop

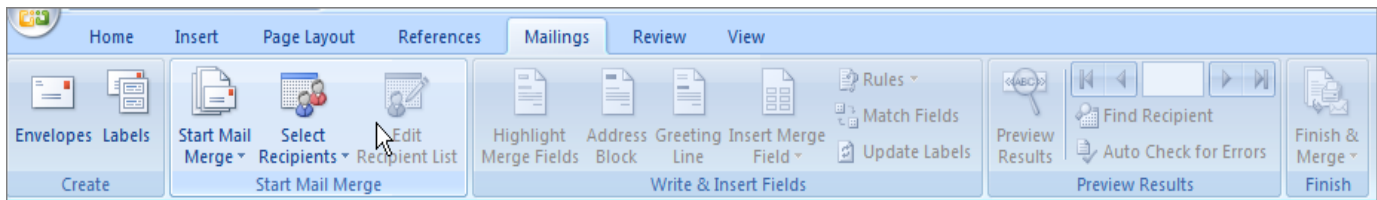
Do you need to create a set of documents that are essentially the same but where each document contains unique elements? Creating each letter, message, fax, label, envelope, or coupon individually would take hours. That's where mail merge comes in. Using mail merge, all you have to do is create one document that contains the information that is the same in each version. Then you add some placeholders for the information that is unique to each version, Word takes care of the rest.

Using mail merge, you can create:

- ❖ **A set of form letters, e-mail messages, or faxes:** The basic content is the same in all the letters, messages, or faxes, but each contains information that is specific to the individual recipient, such as name, address, or some other piece of personal data.
- ❖ **A set of labels or envelopes:** The return address is the same on all the labels or envelopes, but the destination address is unique on each one.
- ❖ **A set of numbered coupons:** The coupons are identical except that each contains a unique number.

Creating a Merged Letter

We will use the commands on the **Mailings** tab to perform a mail merge.



I. Set up the main document

The main document contains the text and graphics that are the same for each version of the merged document. For example, the return address or salutation in a form letter.

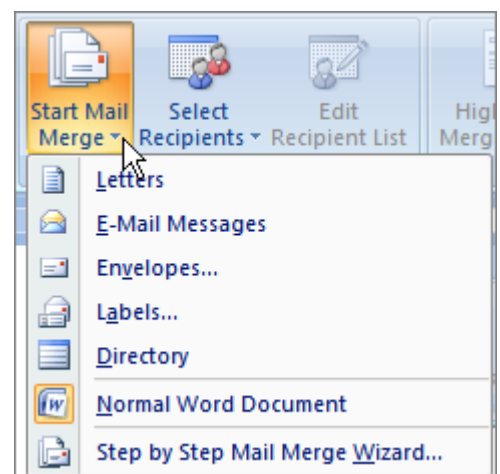
1. Start Word.

A blank document opens by default.
(Open your letter if you already have it created otherwise use the default document to type your letter.)

2. Open the **Mail Merge Practice** document if you are practicing

3. On the **Mailings** tab, in the **Start Mail Merge** group, click **Start Mail Merge**.

4. Click the type of document that you want to create.



II. Connect the document to a data source

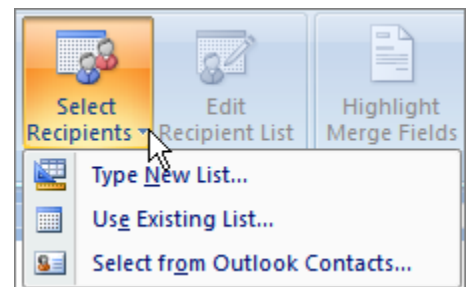
A data source is a file that contains the information to be merged into a document. For example, the names and addresses of the recipients of a letter. If you don't already have a data file, you can create one during the mail merge process.

Data file Sources:

- ◇ **Microsoft Office Excel worksheet or a Microsoft Office Access database**
- ◇ **Type a new list**
- ◇ **Select from Outlook contacts**

Connect the document to a data source

1. On the **Mailings** tab, in the **Start Mail Merge** group, click **Select Recipients**.
2. Click on **Use Existing List**
3. Navigate to the location of the Mail Merge Workshop ”Donations” Excel workbook
4. Select the Excel workbook
5. Click open. Confirm that the correct worksheet that contains the data is selected.
6. Click OK

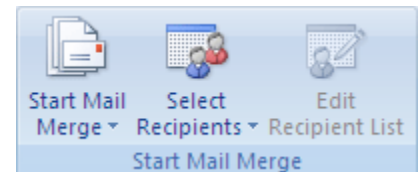


How to refine the list of recipients or items

When you connect to a certain data file, you might not want to merge information from all the records in that data file into your main document.

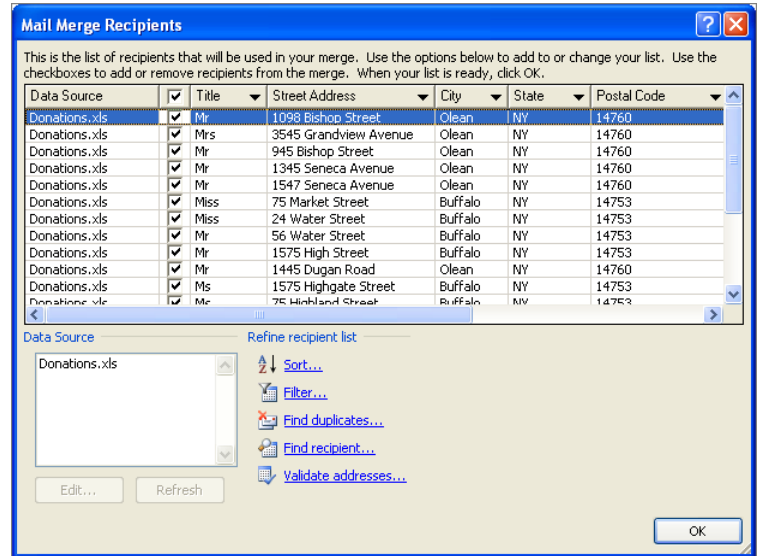
To narrow the list of recipients or use a subset of the items in your data file, do the following:

1. On the **Mailings** tab, in the **Start Mail Merge** group, click **Edit Recipient List**.



2. In the **Mail Merge Recipients** dialog box, do any of the following:

- **Select individual records** – This method is most useful if your list is short. Clear the check boxes next to the recipients you want to exclude.
- **Sort records** – Click the column heading of the item that you want to sort by.
- **Filter records** – This is useful if the list contains records that you know you don't want to see or include in the merge.



III. Add placeholders, called mail merge fields, to the document

After you connect your main document to a data file, you are ready to type the text of the document and add placeholders that indicate where the unique information will appear in each copy of the document.

The placeholders, such as address and greeting, are called mail merge fields. Fields in Word correspond to the column headings in the data file that you select.

	A	B	C
1	Name	Last Name	Street Address
2	Nancy	Anderson	123 Main St.
3	Ann	Beebe	567 Country Rd.
4			
5			
6			
7			
8			
9			

1 Columns in a data file represent categories of information. Fields that you add to the main document are placeholders for these categories.

2 Rows in a data file represent records of information. Word generates a copy of the main document for each record when you perform a mail merge.

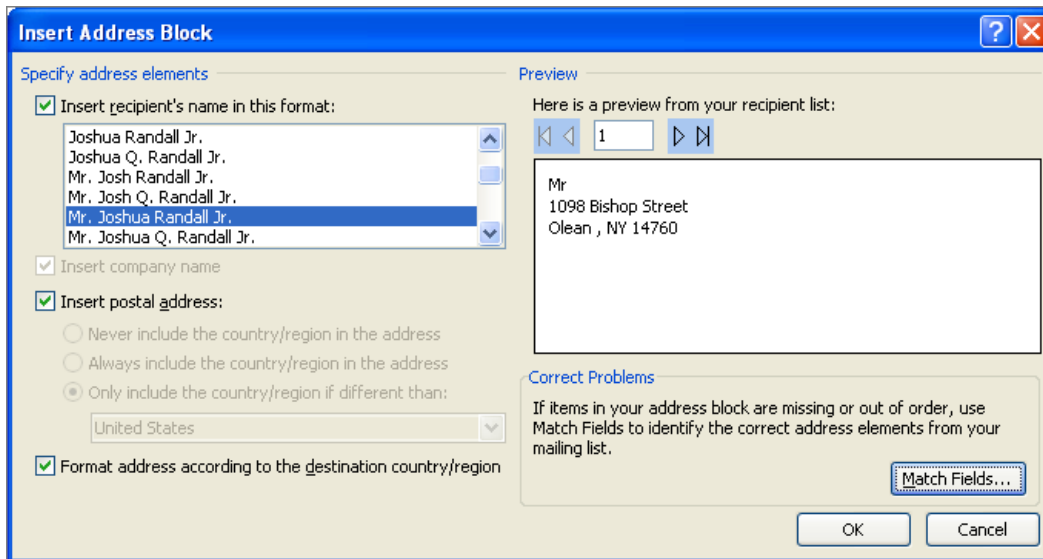
By putting a field in your main document, you indicate that you want a certain category of information, such as name or address, to appear in that location.

Note: When you insert a mail merge field into the main document, the field name is always surrounded by chevrons (« »). These chevrons do not show up in the merged documents. They just help you distinguish the fields in the main document from the regular text.

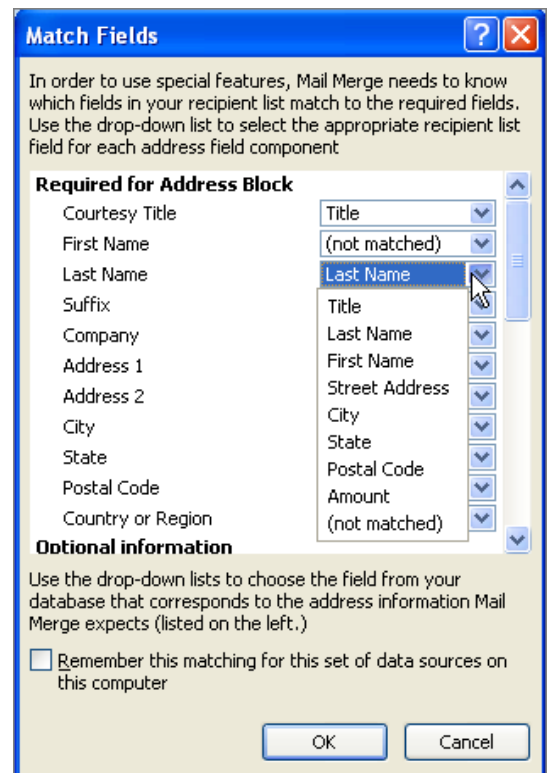
Adding the placeholders



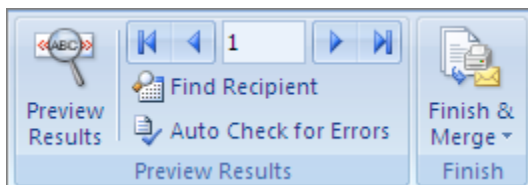
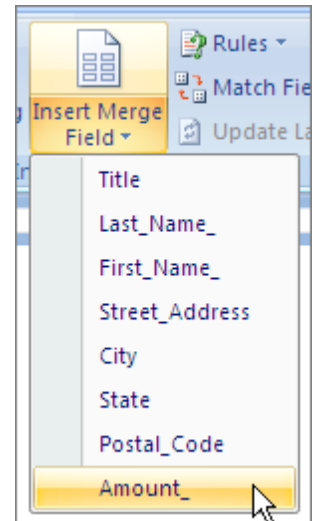
1. In the practice letter, position the cursor at the beginning of “address block” and delete the text
2. Click on **Address Block** in the **Write & Insert Fields** group
3. From the **Insert Address Block dialog box** choose the **format** for the recipient’s name.



4. Click the **Match Fields button** **We need to map the mail merge fields in Word to the columns in your data file**
5. Next to **First Name** click on the drop down arrow and select the **First Name** or the column in your data file that contains the first name information.
6. Next to **Last Name** click on the drop down arrow and select **Last Name**
7. Click **OK**
8. In the practice letter, position the cursor at the beginning of “Greeting Line” and delete the text
9. Click on **Greeting Line** in the **Write & Insert Fields** group
10. From the **Insert Greeting Line dialog box** choose a **greeting line style**



11. If necessary click on Match Fields and match up your fields
12. Click **OK**
13. Select the “**Amount**” text in the practice letter and delete it
14. Click on **Insert Merge Field** in the **Write & Insert Fields** group
15. Click on **Amount** to insert the field in your letter
16. Click on **Preview Results** button in the **Preview Results** group
17. Notice the lack of formatting of the amount field
18. Click on the **Preview Results** button again to turn off the preview

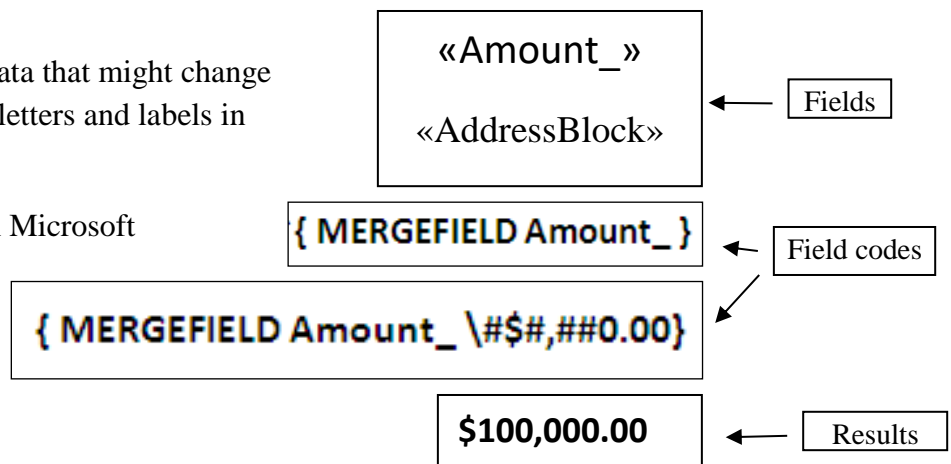


Definitions:

Fields are used as placeholders for data that might change in a document and for creating form letters and labels in mail-merge documents.

Fields are somewhat like formulas in Microsoft Excel

— the **field code** is like the formula, and the **field result** is like the value that the formula produces.



Field codes: Placeholder text that shows where specified information from your data source will appear; the elements in a field that generate a field's result. The field code includes the field characters, field type, and instructions.

Field results: Text or graphics inserted in a document when Microsoft Word carries out a field's instructions. When you print the document or hide field codes, the field results replace the field codes.

Switch between field codes and results

To show or hide field codes for all fields in the document, press ALT+F9.

Formatting the data using the Numeric Picture Field Switch

The **Numeric Picture (\#) field switch** specifies how the data in the field will be displayed. This switch is called a "picture" switch because you use symbols to represent the format of the field result.

For example, the switch `\# $#,##0.00` in `{MERGEFIELD Amount_ \# $#,##0.00}` displays a result such as "\$4,455.70." If the result of a field is not a number, this switch has no effect.

1. To show the field codes for all fields in the document, press ALT+F9.
2. Add the switch `\# $#,##0.00` to the `{MERGEFIELD Amount_ }` field code

Your field code should look like this -

```
{MERGEFIELD Amount_ }
```

Type in the switch `\# $#,##0.00`

Now your field code should look like this -

```
{MERGEFIELD Amount_ \# $#,##0.00}
```

3. Click Save
4. Press the ALT key + F9 to turn off the field codes

IV. Preview and complete the merge

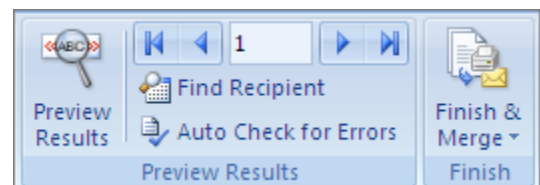
After you add fields to your main document, you are ready to preview the merge results. When you are satisfied with the preview, you can complete the merge.

Preview the merge

You can preview your merged documents and make changes before you actually complete the merge.

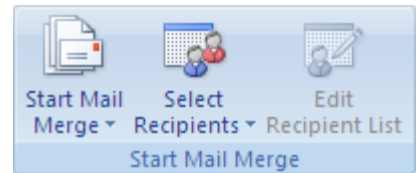
To preview, do any of the following in the **Preview Results** group of the **Mailings** tab:

- Click **Preview Results**.
- Page through each merged document by using the **Next Record** and **Previous Record** buttons in the **Preview Results** group.



- Preview a specific document by clicking **Find Recipient**.

Note: Click **Edit Recipient List** in the **Start Mail Merge** group on the **Mailings** tab to open the **Mail Merge Recipients** dialog box, where you can filter the list or clear recipients if you see records that you don't want to include.

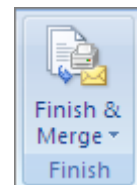


Complete the merge

You can print the merged documents or modify them individually. You can print or change all or just a subset of the documents.

Print the merged documents

1. On the **Mailings** tab, in the **Finish** group, click **Finish & Merge**, and then click **Print Documents**.
2. Choose whether to print the whole set of documents, only the copy that's currently visible, or a subset of the set, which you specify by record number.



Change individual copies of the document

1. On the **Mailings** tab, in the **Finish** group, click **Finish & Merge**, and then click **Edit Individual Documents**.
2. Choose whether you want to edit the whole set of documents, only the copy that's currently visible, or a subset of the set, which you specify by record number. Word saves the copies that you want to edit to a single file, with a page break between each copy of the document.

Save the main document

Remember that merged documents that you save are separate from the main document. It's a good idea to save the main document itself if you plan to use it for another mail merge.

When you save the main document, you also save its connection to the data file. The next time that you open the main document, you are prompted to choose whether you want the information from the data file to be merged again into the main document.

- If you click **Yes**, the document opens with information from the first record merged in.
- If you click **No**, the connection between the main document and the data file is broken. The main document becomes a standard Word document. Fields are replaced with the unique information from the first record.