Mail Merge Demystified

## Part I: Using Your Own Address List for Letters

by
Kim Murdock

Mail Merge is a powerful and dynamic feature in Word XP and 2003. In fact, it's so dynamic that it can be a little overwhelming, and might even keep you from using it. But read on! Mail Merge is a major saver of time and effort, and I promise it will pay off for you.

We'll start with a basic task – a straightforward, one-page form letter to 3 different people. Here's what we're going to do:

1. Create a sample form letter.
2. Create a sample table of names and addresses.   We're going to emulate working with the kind of address list a lot of us already have. We could use a Word wizard to do this, but I'd rather keep it simple.
3. Associate the address list with the form letter.
4. Insert merge fields into the form letter.
5. Merge and print the letters.

Step 1 – Create the sample form letter.
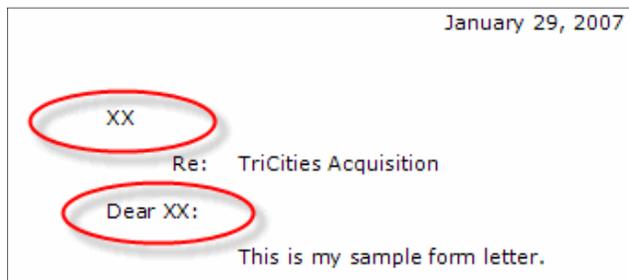
- Create a letter however you normally do it.

- Let's type "XX" as placeholders to mark the locations where merged information will go – at the address block and salutation.

- Save it as "My Form Letter.doc" in your My Documents folder.

Step 2 – Create a sample address table.

You can skip this step if you already have your names and addresses saved in a table, but it must have headings like the ones below.

- Create a new blank document and insert a two-row, four-column table.
- Add headings to each of the columns so the table looks like this:
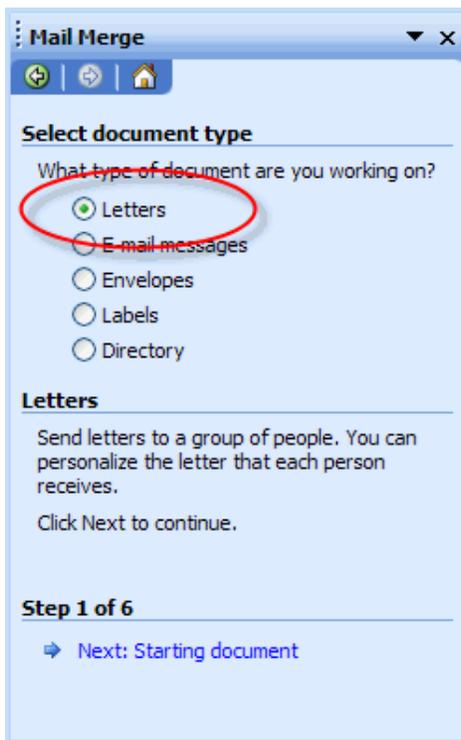
Full Name	Salutation	Position	Address

➤ Now type information into each of the cells like this:

Full Name	Salutation	Position	Address
John Jones	Mr. Jones	President	TriCities Corporation 12345 Main Street Central City, MO 65112

➤ Continue adding information until you have three recipients.
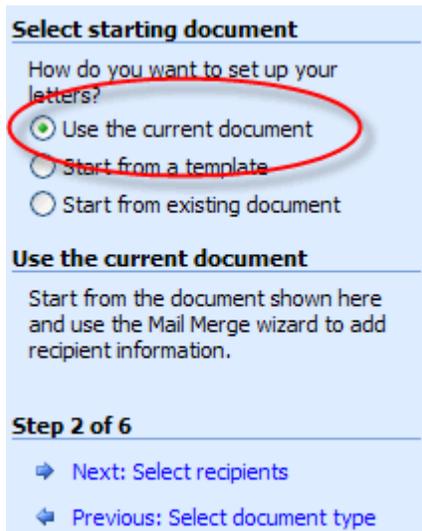➤ Save it as "My Form Data.doc" in your My Documents folder.

Step 3 – Associate the address list with letter.

➤ With the letter on your screen, click *Tools > Letters and Mailings > Mail Merge* on the menu.

Mail Merge

Select document type

What type of document are you working on?
- ⦿ Letters
- ○ E-mail messages
- ○ Envelopes
- ○ Labels
- ○ Directory

Letters

Send letters to a group of people. You can personalize the letter that each person receives.

Click Next to continue.
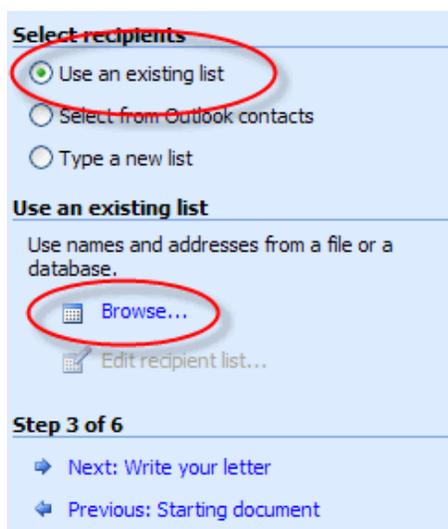
Step 1 of 6

⇨ Next: Starting document

➤ The Mail Merge Task Pane appears to the right of your letter.

➤ "Letters" is selected by default, so move to the next step by clicking the "Next" link at the bottom of the task pane.
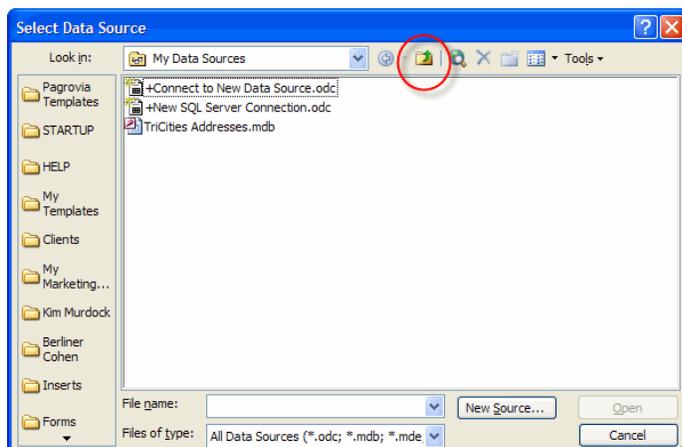
Select starting document

How do you want to set up your letters?

- ◉ Use the current document
- ○ Start from a template
- ○ Start from existing document

Use the current document

Start from the document shown here and use the Mail Merge wizard to add recipient information.

Step 2 of 6

➡ Next: Select recipients

⬅ Previous: Select document type

- ⚙ Again, we're just going to use the default setting to use the current document as our form letter.

- ⚙ Click the "Next" link at the bottom of the Task Pane.

Select recipients

- ◉ Use an existing list
- ○ Select from Outlook contacts
- ○ Type a new list

Use an existing list

Use names and addresses from a file or a database.

- ▦ Browse...
- ▦ Edit recipient list...

Step 3 of 6

➡ Next: Write your letter

⬅ Previous: Starting document

- ⚙ "Use an existing list" is selected by default, but we need to identify our address list, so click the "Browse…" link in the middle of the task pane.

Select Data Source

Look in: My Data Sources

- Pagrovia Templates
- STARTUP
- HELP
- My Templates
- Clients
- My Marketing…
- Kim Murdock
- Berliner Cohen
- Inserts
- Forms

+Connect to New Data Source.odc
+New SQL Server Connection.odc
TriCities Addresses.mdb

File name:

Files of type: All Data Sources (*.odc; *.mdb; *.mde

New Source...   Open   Cancel

- ⚙ The Select Data Source dialog box will open.

- ⚙ Click the "Up One Level" button that I've circled in red. This will display the My Documents folder.
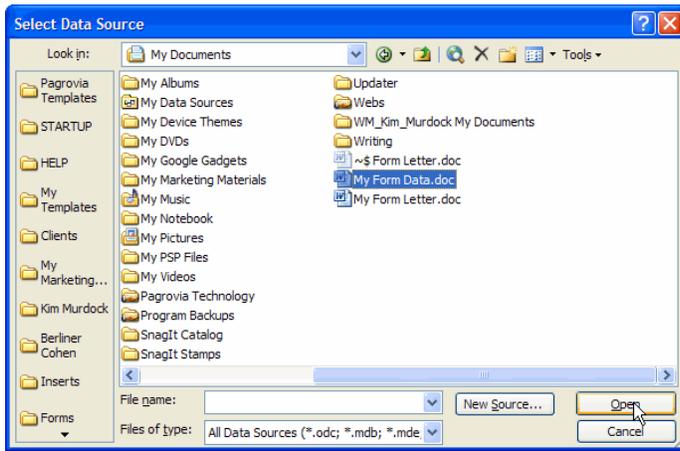
↗ Select the address file we created previously, and click the Open button.
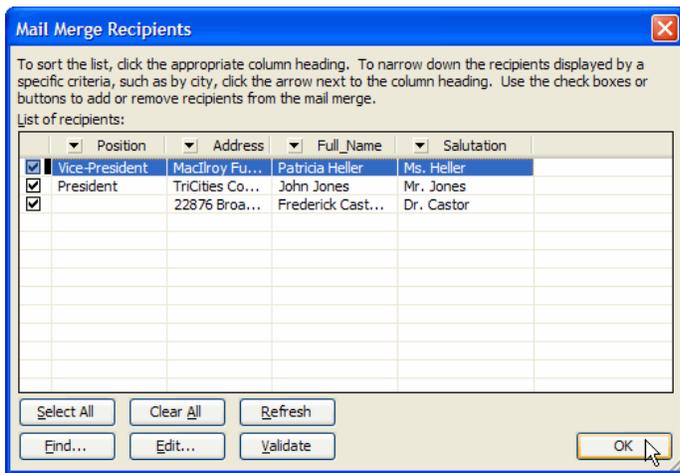
↗ Word displays your data in a dialog box. There are a number of options here… and we're going to ignore them all.

↗ Click OK to associate this data source with your letter.
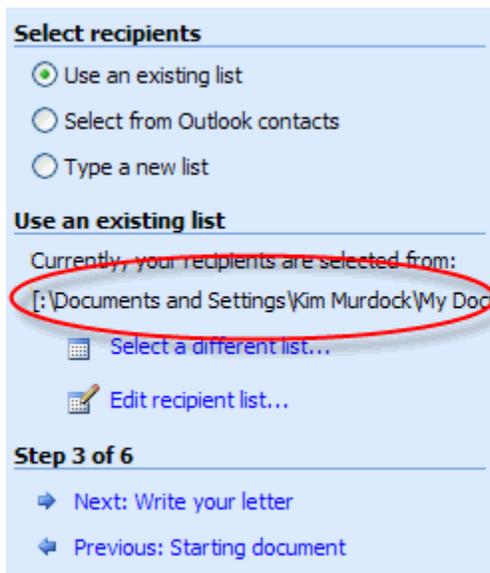
↗ The Task Pane now shows the path to the data. We have succeeded in associating our list with our letter!

↗ Click "Next" at the bottom of the Task Pane.

Step 4 – Insert merge fields into the letter.

Write your letter

If you have not already done so, write your letter now.

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...
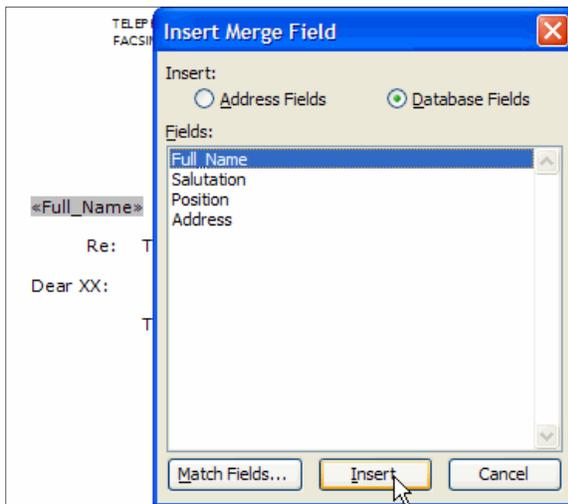- ||||| Postal bar code...
- 📄 More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.
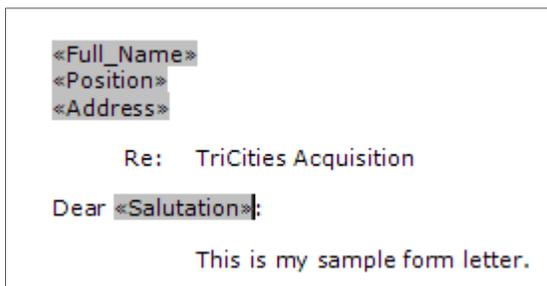
Step 4 of 6

- ➡ Next: Preview your letters
- ⬅ Previous: Select recipients

- Since we created our own custom address table, we'll insert custom fields into the letter.

- Move to the XX in your letter where the first field will go.

- Delete the XX and leave your cursor there.

- Click on "More items..." to display the Insert Merge Field dialog box.

Insert Merge Field

Insert:
- ○ Address Fields
- ● Database Fields

Fields:
- Full_Name
- Salutation
- Position
- Address

«Full_Name»

Re:

Dear XX:

[Match Fields...] [Insert] [Cancel]

- Click the Full_Name field in the list, then click Insert. The Full_Name field is inserted into the document.

- Click Close.

- In the document, press the Enter key to insert a Hard Return.

- Repeat these steps to insert the Position and Address fields immediately under the Full_Name field.

«Full_Name»
«Position»
«Address»

Re: TriCities Acquisition

Dear «Salutation»:

This is my sample form letter.

- Move your cursor to the XX in the salutation line, and delete it.

- Insert the Salutation field.

- When you're done, your document should look like the fields at left.

- Save your document.

- Click the "Next" link at the bottom of the Task Pane.

Step 5 – Merge the letters.

Preview your letters

One of the merged letters is previewed here. To preview another letter, click one of the following:

[<<] Recipient: 1 [>>]

Find a recipient...

Make changes

You can also change your recipient list:

Edit recipient list...

[Exclude this recipient]

When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments.

Step 5 of 6

➡ Next: Complete the merge

⬅ Previous: Write your letter

➤ Click on the right and left arrow buttons on the Task Pane to preview the letters with the information inserted into them.

Frederick Castor, MD
22876 Broadway
East City, MO 65223

     Re: TriCities Acquisition

Dear Dr. Castor:

        This is my sample form letter.

➤ Notice that Word closes up missing info for you; a person with no Position will not have a blank line in their address.

➤ Click the "Next" link at the bottom of the Task Pane.

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.
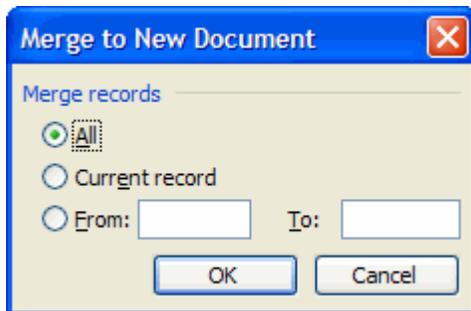
Merge

Print…

Edit individual letters…
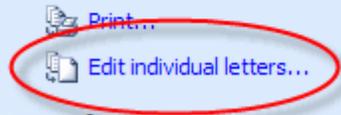
Step 6 of 6

← Previous: Preview your letters

➤ If you click "Print" your finished letters will <u>not</u> be saved. The only way to save them is to click "Edit individual letters…". This creates a single document containing all the letters.

Merge to New Document

Merge records
- ⊙ All
- ○ Current record
- ○ From: [ ] To: [ ]

OK   Cancel

➤ Word will ask you one last question – which records should it merge? Leave "All" selected and click OK.

➤ Scroll through your new document and admire your handiwork.

➤ When you're done, you can close the Task Pane.

Final Comments

Once you get the hang of it, you can do some pretty amazing things with Mail Merge. You can insert fields that will print one thing if something is true and a different thing if it's false. You can merge with different sources, including Excel, Access or Outlook. We'll take a look at some of those possibilities next time.

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