

Mail Merge Demystified

Part II: From Outlook Into Your Letter

by
Kim Murdock

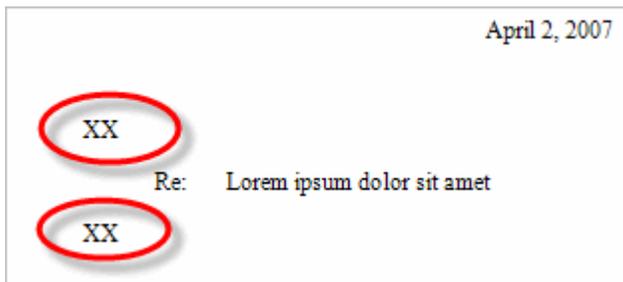
In Part I, we created a document and merged it with a contact list that we typed into a table. But what if you've already got all your contacts saved in Outlook? Why should you retype them? Well, you shouldn't. In Part II, we're going to select our recipients and launch our merge directly from Outlook.

Once again, we're going to create a simple, one-page letter in Word and send it to three different people. Here are the steps:

1. Create a form letter in Word.
2. Select our recipients in Outlook and launch the merge.
3. Insert merge fields into the form letter – this will look a lot like what we did in Part I, but we'll use a different method of inserting the fields.
4. Merge the letter.

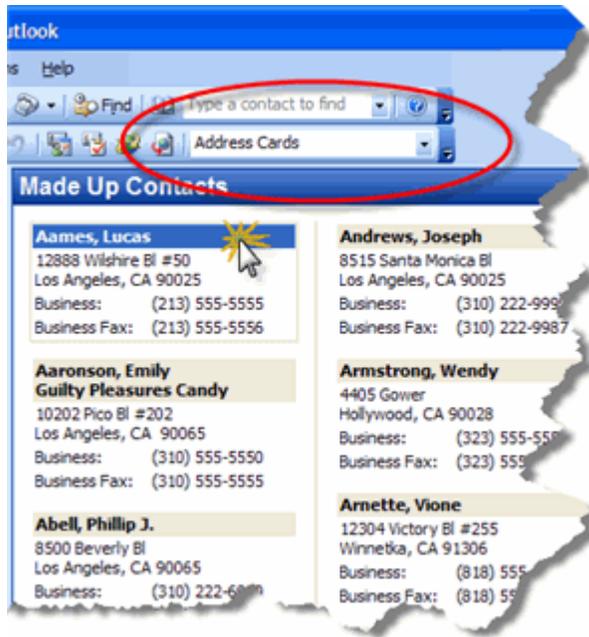
Step 1 – Create the Form Letter.

Create a letter however you normally do it. Don't use the letter we created in Part I. Let's create a whole new letter – it'll be easy.

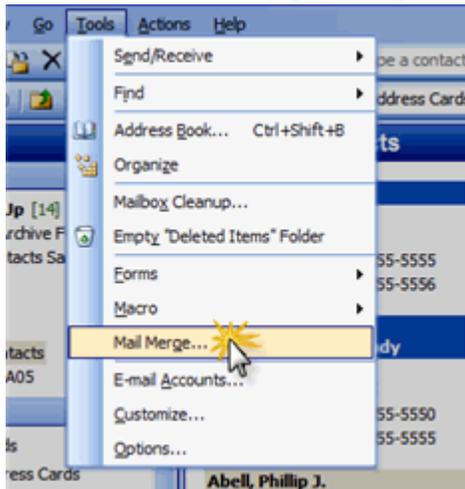


- As we did last time, type "XX" as placeholders to mark the locations where merged information will go – at the address block and salutation.
- Save it as "My Form Letter 2.doc" in your My Documents folder.

Step 2 – Open Outlook to Select the Recipients and Launch the Merge

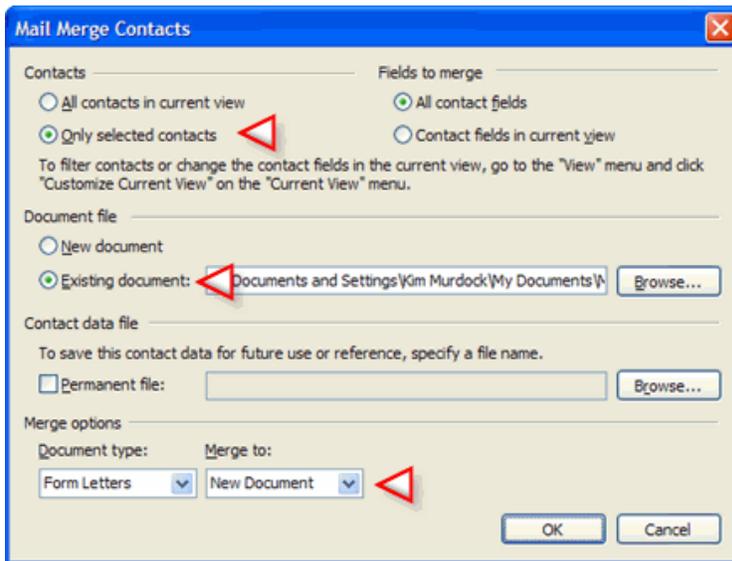


- Open Outlook and display your contacts.
- In “Address Cards” view, click on the contact’s name-bar to select your first recipient. To select multiple recipients, hold down the Ctrl key and click each intended recipient.



- On the Outlook toolbar, click Tools > Mail Merge...

And fill out the Mail Merge Contacts dialog as illustrated here:



- ✎ Make certain you've chosen "Only selected contacts."
- ✎ Type in the path and file name of your new letter OR click Browse to find and select the letter.
- ✎ Document type should already be set to "Form Letters" and Merge to "New Document". If not, change these.

✎ Click OK – Word will open and display your letter.

Step Three – Insert Merge Fields Into the Form

The Mail Merge toolbar should now be visible above the document.

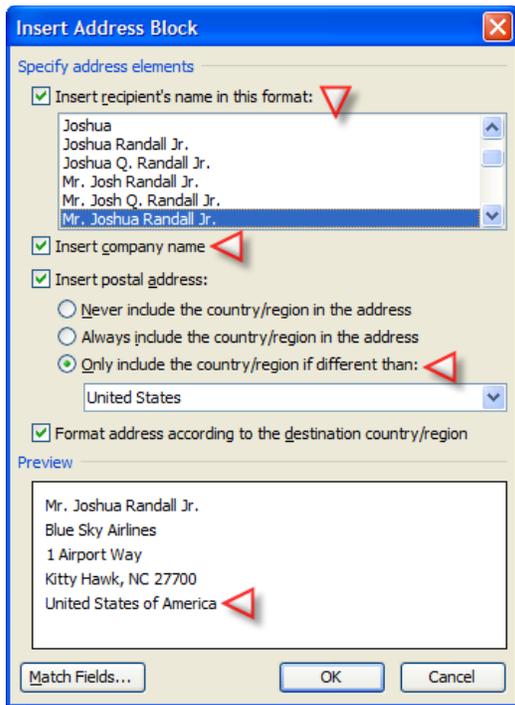


If it isn't,

- ✎ Right click over any toolbar to display a list of available toolbars, and click to display this one.
- ✎ Position your cursor in the letter at the first of the XXs and delete them. Click the "Insert Address Block" button.



You'll be prompted to choose the form of the address block.



We're going to leave it with the defaults, although you may try checking and unchecking options to see the effect they have on the preview at the bottom.

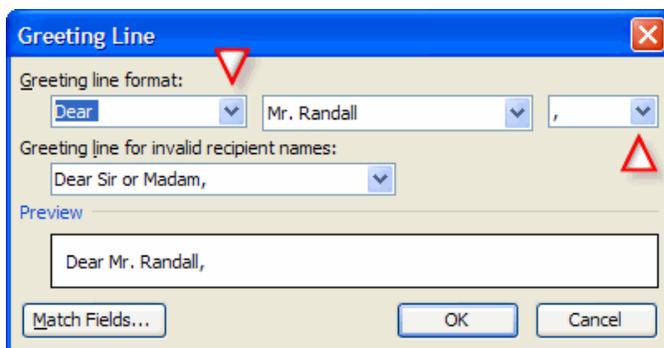
Note that the Preview window displays "United States of America" even if you've told Word to only include the country if it's different than the U.S. It won't merge – it's just Microsoft's way of showing you what a country name looks like.

Click OK.

Next, move your cursor in your letter to the second set of XXs and delete them. Click the "Insert Greeting Line" button.



This will display the Insert Greeting Line dialog box.



Leave the "Dear" in the box on the left, but change the comma to a colon in the box on the right.

Click OK.

If you want to insert other fields from your Outlook contact record into the body of the letter, click the "Insert Merge Fields" button on the Mail Merge toolbar.



For example, you could personalize the letters by including each contact's first name within the body of the letter.

Once other fields are inserted into your letter, the Cancel button turns into the “Close” button. Click Close.

Step 4 – Merge the Letter.

Click the “Merge to New Document” button (or type Alt+Shift+N) to start the merge.



Your merged letters will be assembled and displayed in a new document. Scroll through to make sure they are correct.

That’s it. You’re done!

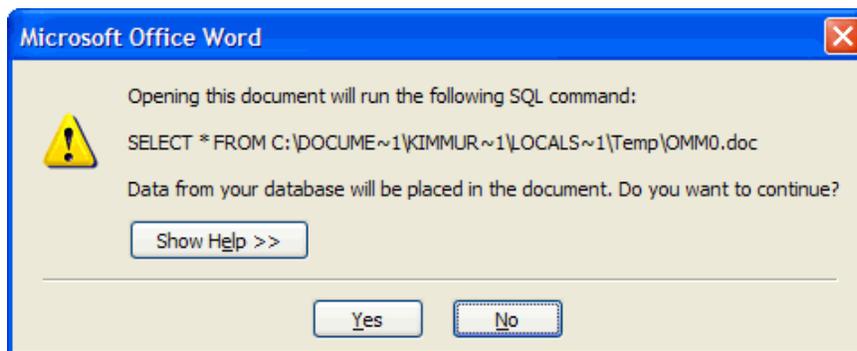
A Few Final Tips:

- ✦ First, you can see what your finished letter will look like in advance by clicking the “View Merged Data” button.



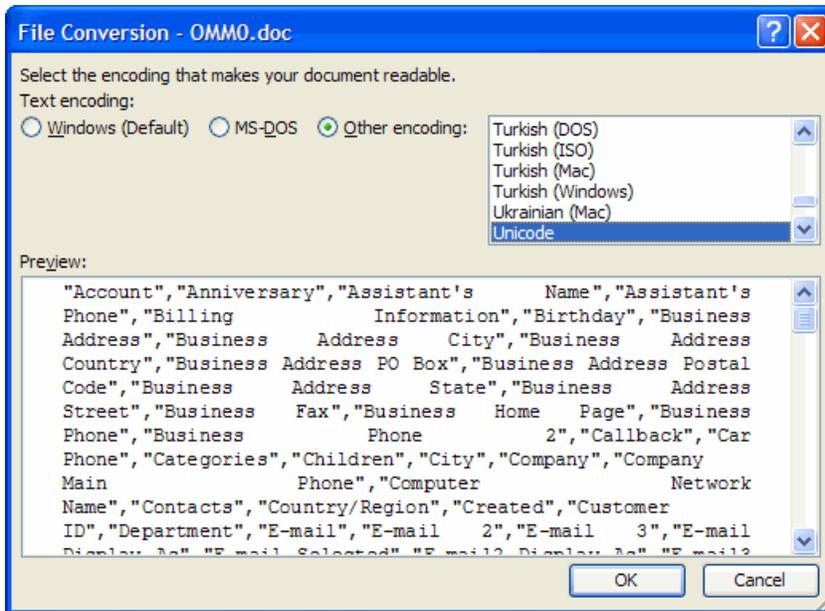
- ✦ Second, your new merge form is now associated with the contacts you chose, but not directly through Outlook. Outlook actually copied your chosen contacts to a temp location.

The next time you open the form document, you’re going to see a couple of mildly confusing and possibly alarming dialog boxes. The first one is a security message that asks you if you want to run the SQL command that will make the data available to your document.



Click Yes. If you click no, the document will open but it will no longer see the Outlook contacts in the temp file. See the Fourth tip, below, if you’ve changed the contact information for any of your saved contacts.

When you click yes, you'll see this dialog:



Click OK. It's the format Outlook used when it saved your contacts to the temp file.

- Third, let's say you realized that after all this, you actually need to include two more contacts, and you've changed the contact information for three others. Go back to Outlook, reselect all the contacts, and go through Step 3 again.
- When you choose the merge form file, remember that it's already been associated with your original set of contacts. Before you even get to click OK to the Outlook dialog, the SQL dialog will display in Word. Click OK to that, then go back to the Outlook dialog, click OK. Now you've reassociated your form with your expanded list of contacts.

Conclusion

So, we've covered a lot of ground again, and done some pretty robust stuff. And there are even more things to know about merging that makes it even more powerful... but that's for another time.

©2007 Kim Murdock