

Mail Merge – Tutorial

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Introduction

Mail Merge is a feature of *Microsoft Word*. **Mail Merge** allows you to prepare a document (such as a letter, envelope, and e-mail) and fill some document fields from a database of information. **Mail Merge** generates several document versions automatically, based on the information in the database.

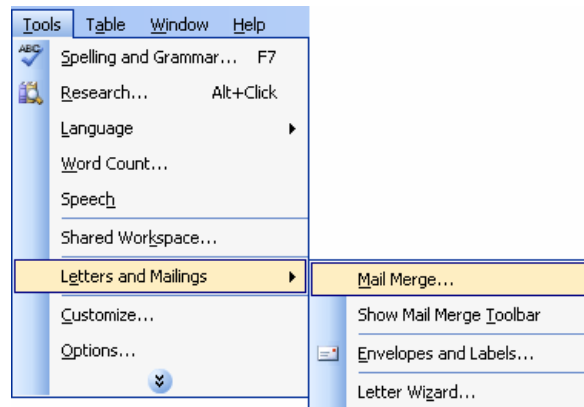
There are three parts needed to create a **Mail Merge** document:

- 1) The framework of the document
- 2) The fields that will be inserted from a database
- 3) The information contained in the database.

Mail Merge for Letters

Word has a **Mail Merge** wizard that guides you through the steps needed to create a mail-merged document.

- 1) Open *Word* and go to **File > New** and select **Blank document** from the **New Document** task pane.
- 2) From the **Menu bar**, select **Tools > Letters and Mailing > Mail Merge**. The **Mail Merge** task pane opens.
- 3) From the **Menu bar**, select **View > Toolbars > Mail Merge**.
- 4) On the **Mail Merge** task pane, under **Select document type**, choose **Letters** from the list and then click on **Next: Starting document**.
- 5) Under **Select starting document**, choose whether to **Use the current document**, **Start from a template**, or **Start from existing document**. Make your selection and click **Next: Select recipients**.
- 6) Under **Select recipients**, choose whether to **Use an existing list**, **Select from Outlook contacts**, or **Type a new list**.
 - a. If you choose **Type a new list** click **Create** found on the lower part of the task pane. The **New Address List** dialog box will open.



Word gives you a default list of information for each recipient; Title, First Name, Last Name... Type the related information on the form. To create the next entry, click the **New Entry** button. You can always choose to delete a recipient by clicking on the **Delete Entry** button. You can search for entries by clicking on the **Find Entry** button. In case you want to sort your entries you can choose the **Filter and Sort** button.

Concerning the sorting option:

- You can sort items in alphabetical or numerical order.
- Click the column heading of the item you want to sort by. For example, if you want to display the list alphabetically by last name, click the **Last Name** column heading.

Concerning the filter option:

- This is useful if the list contains records that you know you don't want to see or include in the merge. Once you've filtered the list, you can use the check boxes to include and exclude records as described in the previous section.
- Click the **Filter Records** tab then click the arrow next to the first cell in the field column to select the field you want to filter by.
- From the **Comparison** drop down list click any of the following:
 - **Is blank:** displays all the records in which the corresponding field is blank.

- **Is not blank:** displays all the records in which the corresponding field contains information.
- If your data source contains records that share the same information, and there are ten or fewer unique values in the column, you can filter by specific information. For example, if there are multiple addresses that list Australia as the country/region, you can filter on Australia.

The address box now displays the designated records only. To display all the records again, click **Filter and Sort** then **Clear All** found at the bottom of the dialog box.

You can customize the available fields to add any additional field by clicking the **Customize** button. That will open a new window which will let you add, remove, rename or reorder the fields.

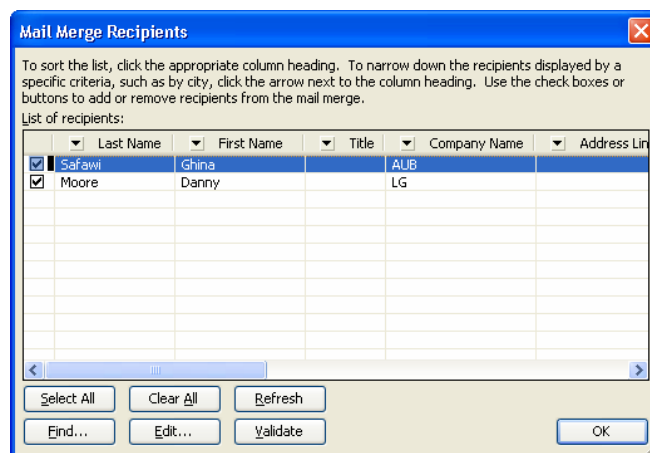
When you have finished creating your list, click **Close** and specify where to save the list file.

Notes:

- Two fields can not have the same name, and you can not use the following characters as part of the field's name: . ! ` []
 - You can use the **First/Next/Previous/Last** buttons to navigate through entries.
- b. If you have a list of information, for instance an *Access* database or a list you've used before, select **Use an existing list** and click **Browse**. Locate the file that contains your data, and click **OK**.

The **Mail Merge Recipients** window appears. It allows you to do the following:

- To omit a recipient, uncheck the box next to that recipient's record.
- You can select one recipient then choose to edit his/her entry by clicking the **Edit** button.
- The **Select All** button allows you to include all the recipients presented above to your **Mail Merge** document.
- The **Clear All** button deselects all recipients listed above.



- You can search for a recipient using the **Find** button.
 - The **Refresh** button refreshes your list after having applied all changes.
 - Finally, the **Validate** button allows you to make sure that the addresses and zip codes in your database are valid. This option is only available if the corresponding address validation software is installed onto your computer. Click the **OK** button.
- 7) After having specified your recipients, click **Next: Write your letter** from the **Mail Merge** task pane. Take the time to type in the text in the document.
- 8) Now you can add recipient information to your **Mail Merge** letter. You can notice the several items displayed on the task pane:

- The **Address block** item allows you to choose a certain format for displaying the recipient's address.
- The **Greeting line** item provides you with different formats for displaying a greeting line to the recipient.
- The **Electronic postage** item allows you to add an electronic postage after installing a special software program.
- The **Postal bar code** item inserts a postal barcode, which is a machine-readable form of address used by the U.S. Postal
- The **More items** item allows you to choose the fields you would like to include in you document. Service.



Place the cursor at the point where you wish to insert a field in your **Mail Merge** letter and click **More items**.

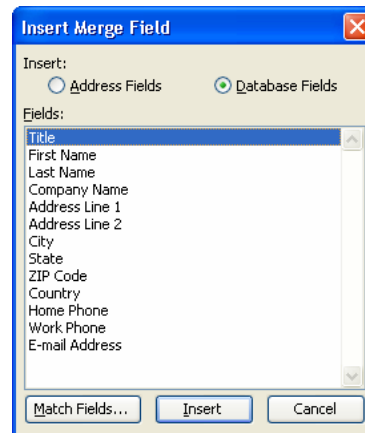
Choose the appropriate field from the **Insert Merge Field** and click **Insert**.

The field will be inserted as text enclosed in brackets, for instance, <<First Name>>.

When you complete the merge, these fields will be replaced with the appropriate information from each recipient record.

Continue until you have inserted all the fields you want in your letter.

Be sure to check each document carefully and make sure minor details such as commas and periods are placed correctly.



9) Save your document and click **Next: Preview your letters**

10) You may now preview your letters by clicking the << and >> buttons in the task pane. You may also want to edit the recipient list by clicking on **Edit recipient list**, or exclude a recipient's letter by clicking on **Exclude this recipient**. Click **Next: Complete the merge**.

- 11) You may now either click **Print** to print your letters, or click **Edit individual letters** to generate a new *Word* document out of every letter. In this case, you can view each recipient's record separately. You may then save, edit, or print the letters as you would do with any *Word* document. Using the **Mail Merge** toolbar navigate through the records independently.

Mail Merge for E-mail

In order to be able to send an e-mail message you must have a default mail client on your PC. You can set *Outlook Express*, or *Microsoft Outlook* to the default email client or any other e-mail client. The first thing you should do is to configure an e-mail account. You can refer to the tutorial by ACC on *Outlook Express*, or *Microsoft Outlook* for more information on how to setup and configure your email client on AUB campus.

Before you start typing your message, you must set the e-mail client you configured as the default email client. To do so follow these steps:

- On the computer desktop, locate the icon for *Internet Explorer* and right click it
- Choose **Properties**. A dialog box appears. Select the **Programs** tab. Check the e-mail client provided. Choose <The concerned software> from the **E-mail** drop-down menu. Now that you have an e-mail account, you can start creating your e-mails!

Create a new **Mail Merge** document by clicking **New Blank Document** button from the **Standard** toolbar, or by going to **File > New** from the **File** menu. On the **File** menu select **Tools > Letters and Mailings > Mail Merge**, the **Mail Merge** task pane opens.

- Select **E-mail messages** and click **Next: Starting document**.
- Choose **Use the current document** and click **Next: Select recipients**.
- Now, you can choose your list of recipients or create a new one. It is important to note here that in the recipient list there must exist an e-mail address field, and all recipients must have an e-mail account (Remember you are sending an e-mail!). When done, click on **Next: Writing your e-mail message**.
- Type a simple e-mail message. You might choose to insert fields into your e-mail message like you would while writing a letter.
- When done, click on **Next: Preview your e-mail messages**.
- From the **Preview your e-mail messages** task pane preview your messages using the << and >> buttons.
- Click on **Next: Complete the Merge**. You may save the file as is for future editing or printing. You also have the option to electronically send the messages to their corresponding recipients. To do so click on **Electronic Mail** found in the task pane. This will open the **Merge to E-mail** box. Under **Message options** make sure you do the following:
 - From the **To** field make sure you select the Email address field.
 - You can provide a subject for your email message by typing it in the **Subject line** text box.

- The **Mail format** option asks whether you want to send your e-mail as a plain text, attachment, or an **HTML** file. **HTML** text allows you to apply formatting to the text. **HTML** on the other hand provides the text in an uneditable format. Remember that the option you choose is applied to all the e-mails you are sending.
- Before sending the messages check the **Send records** section. Here you can choose what email messages to send: whether **All** messages, the **Current message** (which's the one currently displayed on **Word**), or a certain range of messages specified in the **From** and **To** fields.
- Click on **OK**. You get confirmation messages specifying the addresses you are sending to and the subject line. The messages finally ask you if you are sure about sending your messages.

Note: In case you don't want to receive confirmation messages, you can use **Microsoft Outlook**. **Outlook Express** always displays these messages; there is no way to prevent them.

Mail Merge for Envelopes

Go to **Tools > Letters and Mailings > Mail Merge** choose **Envelopes** from the list.

- After clicking on **Next: Starting Document**, click on **Envelope options**, a dialog box will appear. From the **Envelope Options** tab, you can choose the envelope size you want, you can also choose to increase or decrease the indentation from the left and top. You also have the option to change the **Delivery address** and **Return address** fonts.
- From the **Printing Options** tab you can specify the **Feed method**.

Note: **Word** automatically inserts a return address in your envelope if there is one.

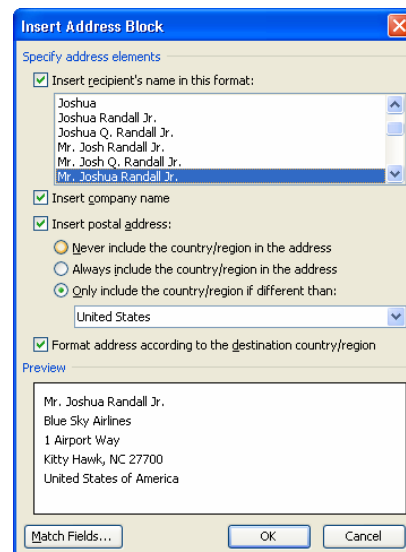
You can check by going to **Tools > User Information > Mailing Address**.

After clicking **Next**, you can browse for an existing list or create a new one.

The following step is to arrange your envelope.

You can choose an address block, through which you can choose to insert your recipient's address in a specific format. The formats are presented to you in the **Insert Address Block** dialog box:

You can even include a greeting line, electronic postage, postal bar code in your envelope. Most importantly the **More Items** link allows you to insert your desired fields.



Note: Another method to insert fields into your document, or envelope, is by using the **Insert Merge Fields** icon found on the **Mail Merge** toolbar.

Note: In the central bottom part of your envelope you have a frame into which you can insert your fields. This is to make things neat and tidy. You can edit this field like a drawing canvas.

Mail Merge for Labels

Sometimes you want to create labels including the addresses of different groups of people. **Word** provides you with different types of label formats. Working with labels is similar to working with envelopes. All you need for a label is a recipient's address.

1. In step one you choose labels.
2. In step two you have to choose a document (label) layout by clicking on **Label options**.

A dialog box pops up presenting the printer options as well as the product number. Each product number presents a different label type and thus different information related to it. The information is listed on the right.

You can even customize a new label by clicking on the **New Label** button.

The dimensions of this new label can be specified with a preview presented at the top; moreover, you can give it a specific name.

- In step three you should select your recipients, remember that you must include addresses in the fields in case you are creating address labels.
- In step four you are ready to include the fields into your labels. It is enough to include the desired fields in the 1st label only, then clicking the **Update all labels** button which creates a copy of the layout of the 1st label to the other labels on the page; i.e. replicate labels.
- You can preview your labels, and complete the merge.

Mail Merge for Directory

You might want to create a single document containing a catalog or printed list of addresses. **Mail Merge** for directory is helpful to sort your recipients and create the appropriate directory.

A good way to do so is by selecting in step 2 **Select template...** and then select **Contemporary Merge Address List** template. This template represents a table with different headings. You can include the information of each recipient under the relative headings. **Word** automatically provides the field names under the relative headings. You can directly go to previewing your directory, and completing the merge.

Mail Merge Toolbar



- **Main document setup:** specifies the type of the current document. It opens a dialog box.

- **Open Data Source:** allows you to choose your data by browsing, looking for a list of names for example...
- **Mail Merge Recipients:** displays the current list you are working with in the **Mail Merge Recipients** dialog box.
- **Insert Address Block:** displays the **Insert Address Block** dialog box. It specifies the format of the inserted recipient address.
- **Insert Greeting Line:** allows you to insert a greeting line in your document. You can choose the format you want.
- **Insert Merge Fields:** allows you to insert the fields in your document.
- **View Merged Data:** allows you to view the result of an inserted merged field. That is, the way the field looks after merge is done.
- **Highlight Merge Fields:** highlights all merged fields in your document.
- **Match Fields:** sometimes *Microsoft Word* may have been unable to find some of the information it needs for the address block, greeting line, or other fields. Match fields allows you to select the field from your data source that corresponds to the field required for the Mail Merge.
- **Propagate Labels:** activates all labels; i.e. what you apply to the first becomes automatically applied to the rest.
- **First Record, Previous Record, Go to Record, Next Record, and Last Record:** allow you to navigate through your records and go to a certain one.
- **Find entry:** searches for a specific term by typing this term in the **Find** text field in the **Find Entry** dialog box.
- **Check for Errors:** *Word* can check for mistakes (whether grammatical, or spelling mistakes in your document...).
- **Merge to New Document:** a final step where you can view all the documents separately.
- **Merge to Printer:** print all your documents.
- **Merge to E-mail:** e-mail all your documents.
- **Merge to fax:** fax all your documents, that is if you have a fax installed on your computer.
- **Insert Merge Fields:** allows you to insert the field you want in case you do not want to use the **Insert Merge Fields** button next to **Insert Word Field**.
