

IT Training

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Office 2007

Word

Mail Merge

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INTRODUCTION

These notes and exercises are aimed at those wanting to learn how to produce mail merged letters and labels.

Knowledge assumed

- experience of using Windows
- a good working knowledge of Word
- some knowledge of Access would be useful
- some knowledge of Excel would be useful

Areas covered

- creating a main document
- creating a data source
- merging the two to create form letters and labels
- merging data from different sources
- sorting data



Document signposts

Instructions for you to type

Bold text

Shortcuts

Reminders



Notes



Exercises



MAIL MERGE OVERVIEW

Mail merge is a feature supported by many word processors that enables you to generate form letters, labels, envelopes, directories and mass email and fax distributions.

A form letter is one in which the body of the letter stays the same but specific information is inserted for or about several different individuals.

To produce a form letter, you first store a set of information, such as a list of names and addresses, in one file. In another file, you write a letter, substituting merge fields in place of names and addresses (or whatever other information will come from the first file).

There are several stages to completing the basic process:

- **Create the main document**

This contains the form letter that you intend to send to a number of people. Rather than having to personalise each one individually, you use special merge fields in place of, for example, the recipient's name and address. At this stage you simply enter the text and any graphics you want to include and save the file.

- **Create the data source**

The data source is the file that holds the information, for example names and addresses. It can be specific to the letter you are about to produce, or it can be a large file from which you filter the names that you want to use for this particular mailing.

Each recipient's information is contained in a **record**.

Each individual piece of information within that record, for example a recipient's job title, company name, or town, is called a **field**.

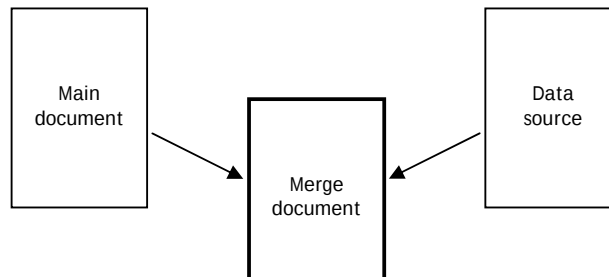
Data need not be names and addresses. It can be anything relating to the document you are producing (for example dates).

- **Include the merge fields in the main document**

Once the data source has been created, the merge fields can be included in the main document. Part of the process of creating the main document includes inserting the merge fields into the text.

- **The merge**

The main document and the data source are combined to produce individual personalised letters. While you can send the output directly to the printer, it may be wise to write it to a file to enable checking before printing.



GETTING STARTED

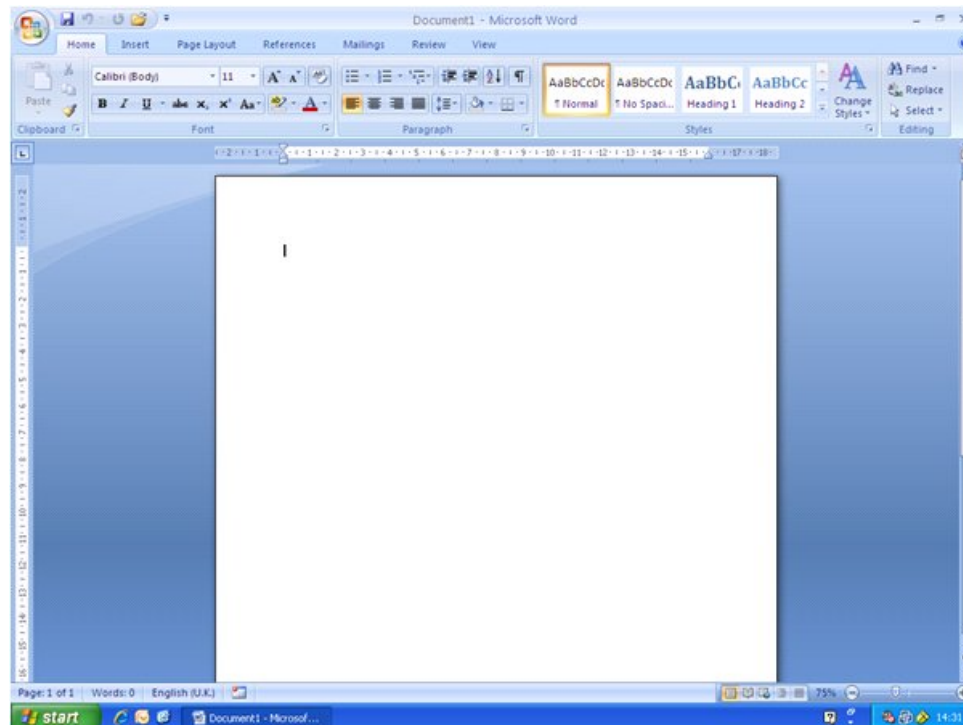
- Double click the Word 2007 icon on the desktop



or

- Click the **Start** button
- All Programs
- Microsoft Office
- Microsoft Office Word 2007

The opening window is displayed.



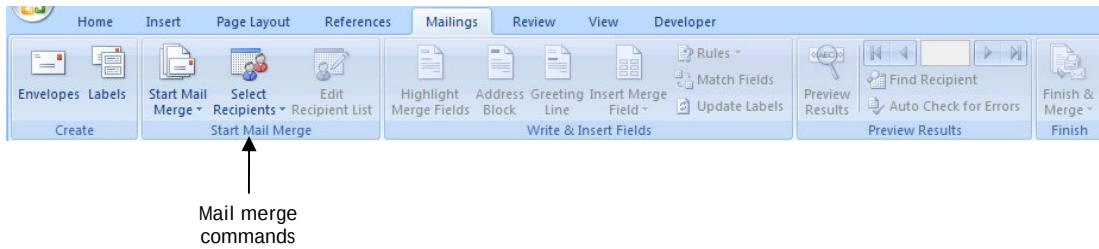
On the Office Ribbon:

- Click the **Mailings** tab

MAILINGS TAB

The Mailings tab is where you will find commands which enable you to create letters, envelopes, and labels for mass mailings.

The Mail Merge commands are found in the Start Mail Merge group.



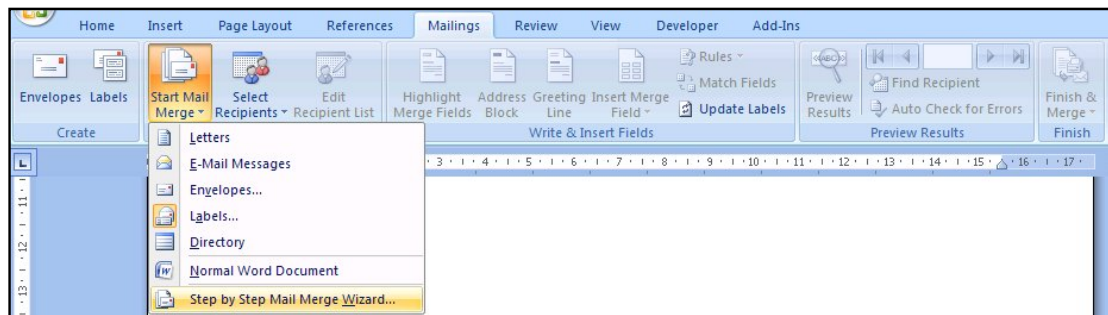
THE MAIL MERGE WIZARD

To help you to create form letters, labels, envelopes etc, Word provides a Mail Merge Wizard which takes you through the process step by step. You are going to use the wizard to produce a letter and labels.

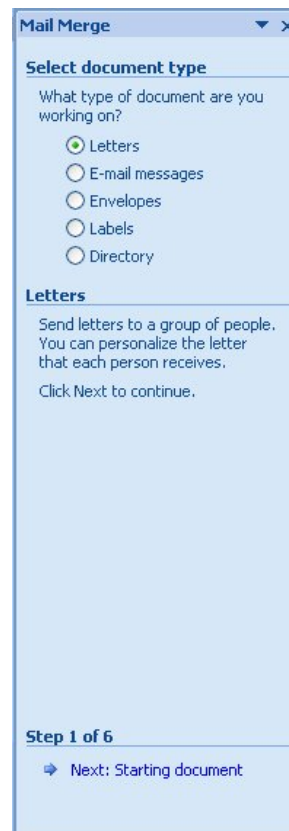
CREATING A FORM LETTER

From the **Start Mail Merge** group on the **Mailings** tab:

- Click **Start Mail Merge**
- Select **Step by Step Mail Merge Wizard**



The Mail Merge task pane is displayed.



The wizard guides you through the mail merge process in a series of six steps – you are currently looking at Step 1.

As well as moving forward through the steps, you can, if necessary, return to a previous step.

Step 1 – Selecting the document type

You need to select the type of document you are working on.

You have a choice of five options, and an explanation of the currently selected option is displayed in the task pane.

Current
choice

Explanation



➤ Click each of the options in turn to see the explanation

You are going to create mail merged letters.

➤ Ensure the **Letters** option is selected

➤ Click

➡ Next: Starting document

Step 2 – Selecting the starting document

You are prompted to select the starting document and, again, an explanation of the currently selected choice is displayed.



Use the current document – uses the file you have open

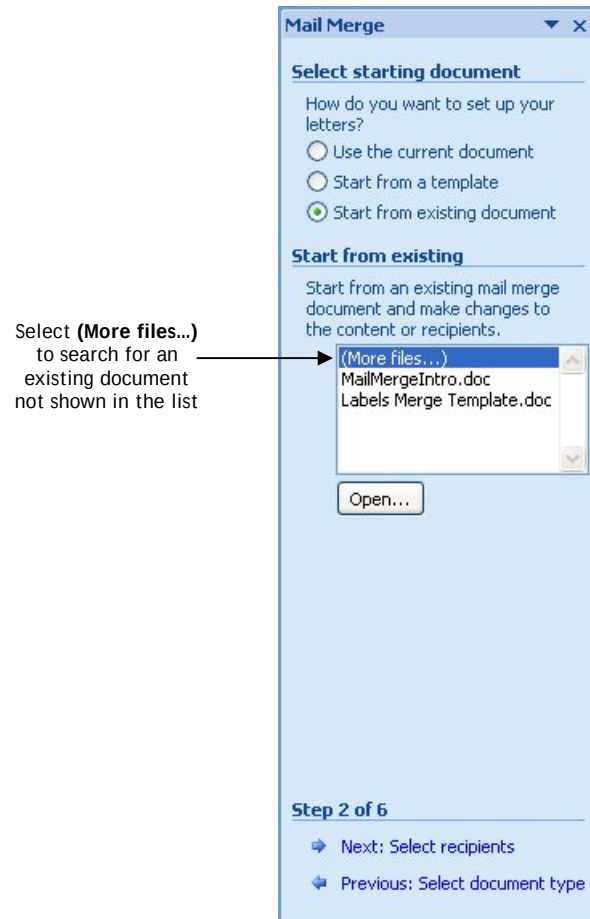
Start from a template – allows you to browse and choose a template

Start from existing document – allows you to choose from a list of existing mail merge documents

You are going to use a letter file that has already been set up.

➤ Select **Start from existing document**

The **Start from existing** section in the wizard shows you existing mail merge documents.



You are looking for the file named **Autumn Season** which is located in the WordMailMerge folder on drive C.

➤ If the document is shown in the list, select it and click **Open**

or

➤ If the document you want is not listed, select **(More files....)** and click **Open**

You can then locate and open the file you want.

The document opens.

Ref FT/MS/AS070

17 April 2008

Dear

AUTUMN SEASON

Our new Autumn programme offers something for everyone, from Shakespeare to Russell, from Pinter to Sondheim. For the first time there's also a special fun-packed show for the children where audience participation isn't just encouraged, it's expected!

As a subscription member, you can take advantage of reduced prices and priority booking. Our monthly planner and booking form are enclosed, together with the Autumn programme brochure.

Enjoy browsing through the brochure, but don't take too long! Return your booking form as soon as possible to ensure the dates and seats you require.

Happy theatre-going!

Yours sincerely

Judith O'Connor
Box Office Manager

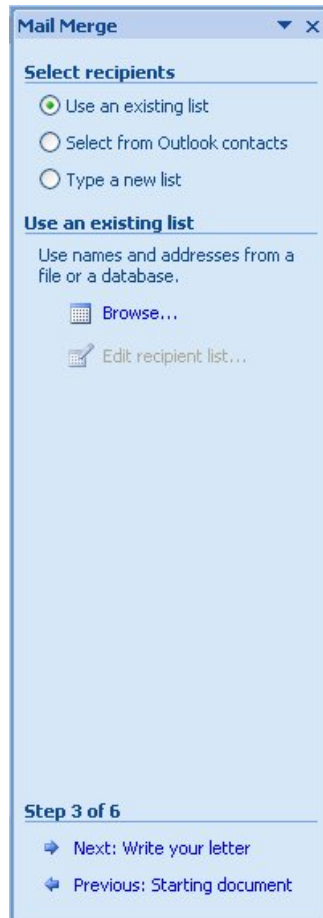
Eccs

➤ Click

➡ Next: Select recipients

Step 3 – Selecting the recipients

You are required to select the recipients of the letter.

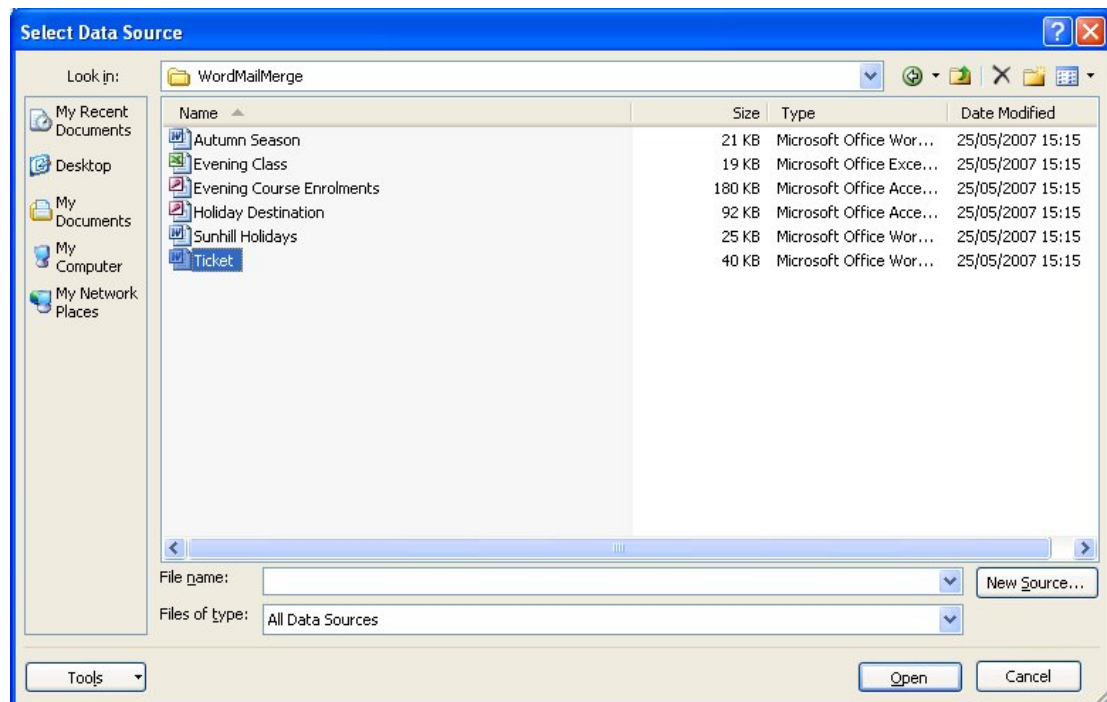


You are going to use an existing list named **Ticket**, and so need to search for it.

➤ Click **Browse**

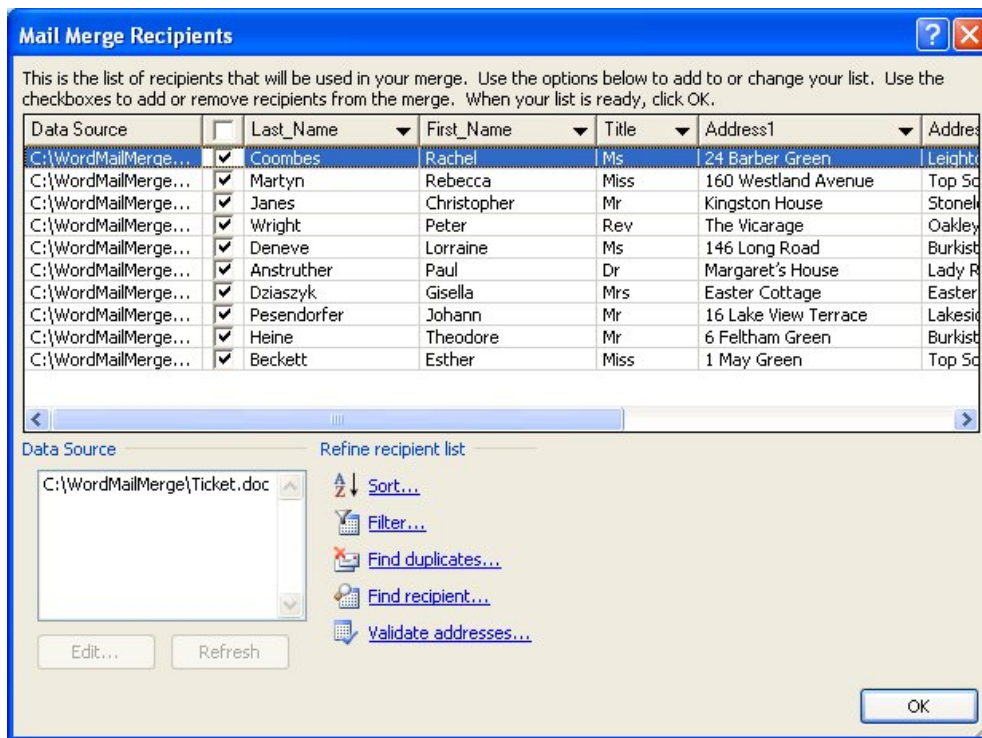
The Select Data Source dialog box is opened.

- Locate the file named **Ticket** in the **WordMailMerge** folder on drive C



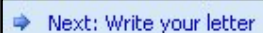
- Click **Open**

The Mail Merge Recipients dialog box is displayed.



Everyone listed in the Ticket file is to receive a letter. The tick against each record indicates that it is selected for inclusion in the merge.

➤ Click **OK**

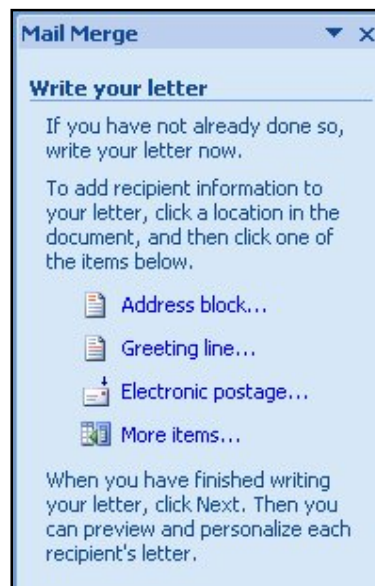
➤ Click 

Step 4 – Writing the letter

The letter is already written. You are going to add the recipient information to it.

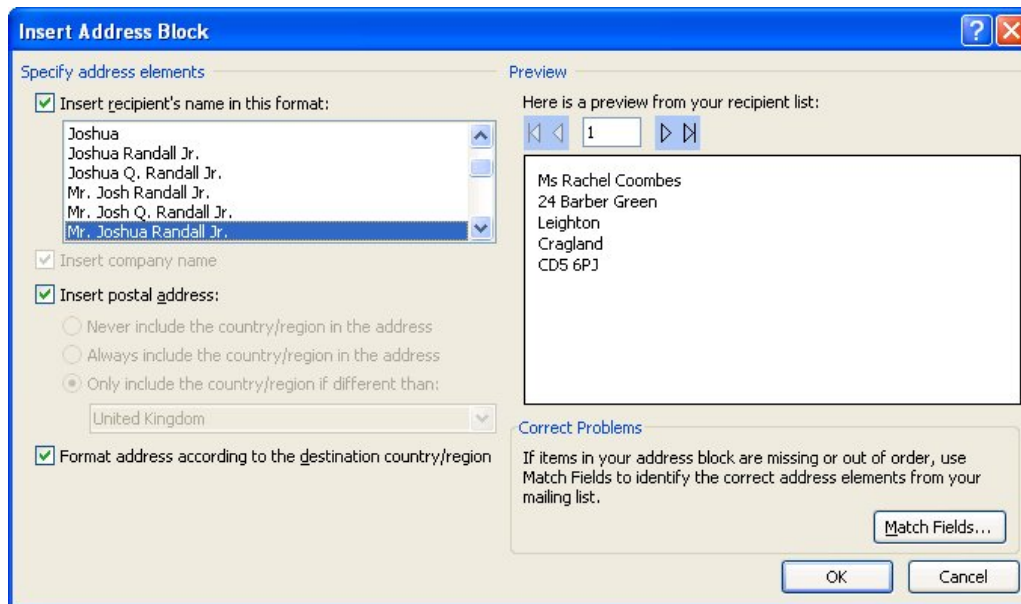
- Position the insertion point in the document in the blank space between the date and “Dear”

You can use the **Address block** to automatically add the name and address to the letter.



- Click **Address block...**

The Insert Address Block dialog box is displayed.



- Notice that a recipient's name format is already selected.

This dialog box allows you to select the way that the address elements will be presented. The Preview pane at the right shows you what to expect.

- Do not make any changes
- Click **OK**

The address block field is added to the letter.

- Position the insertion point next to "Dear" and press the spacebar once

You are going to add the title and last name fields to the salutation.

- Click **More items...**

The Insert Merge Field dialog box is displayed showing you the list of fields in the Ticket file.



- Notice that the **Title** field is already selected
- Click **Insert**

The dialog box does not allow you to pause to add spaces between fields, so it is quicker to insert all of the fields that you want, and then insert the spaces between them afterwards.

- Select **Last_Name**
- Click **Insert**
- Click **Close**
- Position the insertion point between <<Title>> and <<Last_Name>>

Position the insertion
point here

- Press the spacebar once
- Position the insertion point before the word "subscription" in the first sentence of the second paragraph
- Click **More items...**
- Select the **Subscription** field

- Click **Insert**
- Click **Close**
- Press the spacebar once

«AddressBlock»

Dear «Title» «Last_Name»

AUTUMN SEASON

Our new Autumn programme offers something for everyone, from Shakespeare to Russell, from Pinter to Sondheim. For the first time there's also a special fun-packed show for the children where audience participation isn't just encouraged, it's expected!

As a «Subscription» subscription member, you can take advantage of reduced prices and priority booking. Our monthly planner and booking form are enclosed, together with the Autumn programme brochure.



You could save the file complete with its merged fields to use on another occasion. If you open it again in the mail merge wizard, the main document and the data source are already linked together.

- Click  **Next: Preview your letters**

Step 5 - Previewing the letters

The letter file (Autumn Season) and the name and address file (Ticket) are merged and you see the result.



➤ To move through the letters, use the  buttons in the task pane

➤ Click 

Step 6 – Completing the merge

You are ready to produce the letters – either to print them or to edit individual letters.



- Notice that the status bar at the bottom of the window shows 'Page: 1 of 1', indicating that there is only one page in the file

If you choose to print, the letters are merged to the printer and you will see the Print dialog box.

If you want to check the letters before printing, or save the merged file as a new document so that you can return to it at a later date, you should choose to edit the letters.

- Select **Edit individual letters...**

The Merge to New Document dialog box is displayed.



- Click **OK**

The letters are merged to a new file, and the status bar shows 'Page: 1 of 10', indicating that there are 10 pages in the file.

- Save the merged file in the WordMailMerge folder on drive C as **Autumn Merged Letters**
- Close the file

The underlying file containing the merge fields is still open.

- Close the file without saving



Before continuing, let's just recap on the mail merge process.

1. Create and save a main document, or load a ready-prepared one.
2. Create a data source, or load a ready-prepared one.
3. Add merge fields to the main document. You can save the file at this stage which, if you are going to use the letter again, will allow you to merge with the same recipients' file or choose another.
4. Preview the result – you see the first letter only (*Page: 1 of 1* on the status bar).
5. Complete the merge.
6. Print or edit – if you choose to edit, a separate document is created showing all letters (*Page: 1 of n* on the status bar). You can save this document.

CREATING LABELS

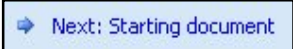
Next you will create a set of labels for these letters.

- Open a new document

From the **Start Mail Merge** group on the **Mailings** tab:

- Click **Start Mail Merge**
- Select **Step by Step Mail Merge Wizard**

From the Mail Merge task pane select:

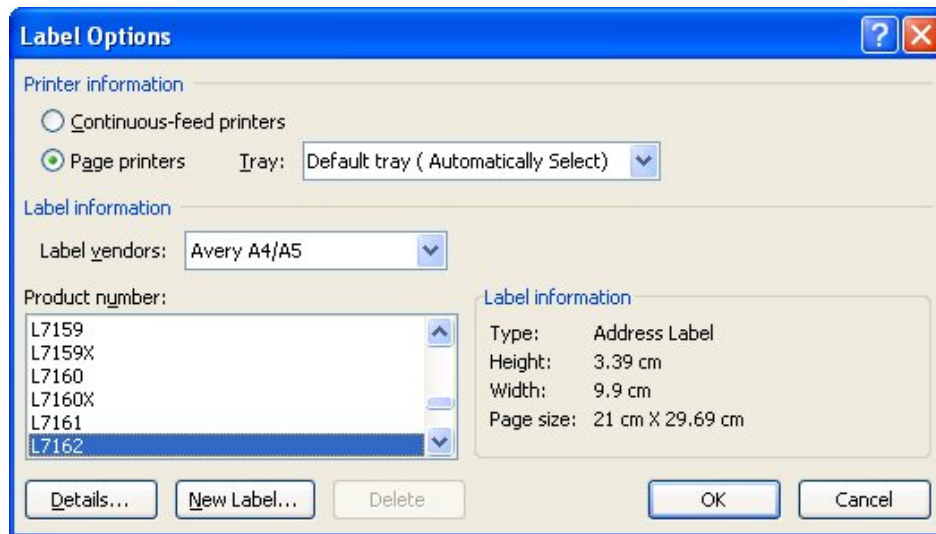
- Labels
- Click 

This time you see the options available for mailing labels.



- Select **Label options...**

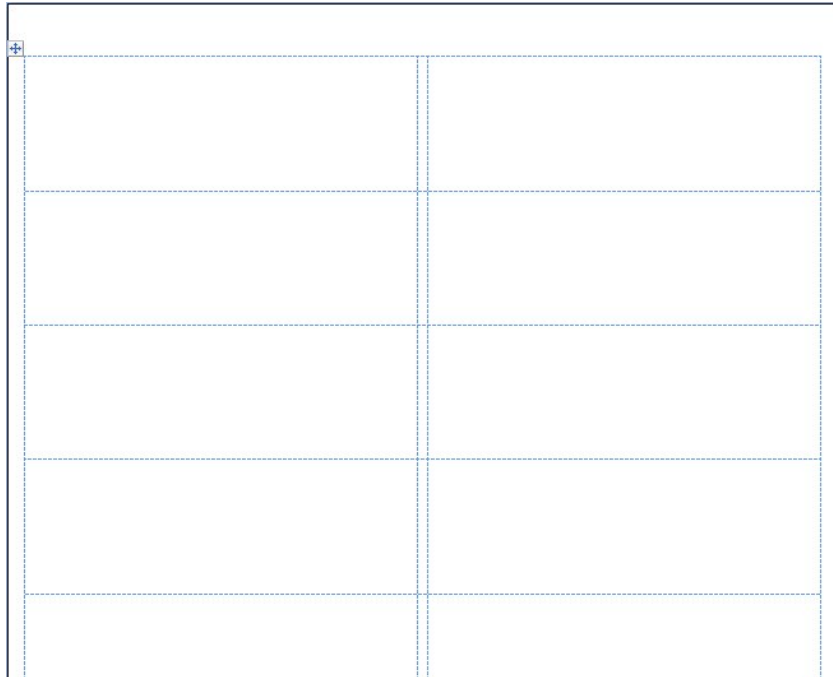
The Label Options dialog box is displayed.



Word has details of many of the commercially-available labels, but if the size that you want is not listed, you can create your own custom label.

- In the **Printer information** section, select **Page printers**
- In the **Label information:** section, select **Avery A4/A5**
- In the **Product number:** section, select **L7162**
- Click **OK**

The gridlines of the labels are displayed.



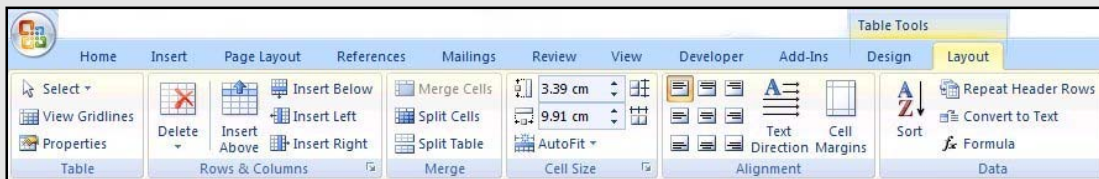


If you do not see the gridlines:

- Select the Layout tab on the Ribbon

In the Table group:

- Select View Gridlines



View
Gridlines



By default, Word uses the **Normal** paragraph style for labels.

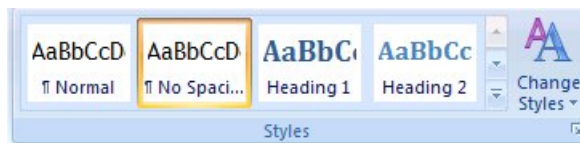
However, in Word 2007, the Normal paragraph style has added spacing. In practice this means that there will be extra spacing between the lines of text on the labels.

The simplest way to get around this problem is to use the **No Spacing** paragraph style.

Applying the No Spacing paragraph style

With the cursor positioned in the first label:

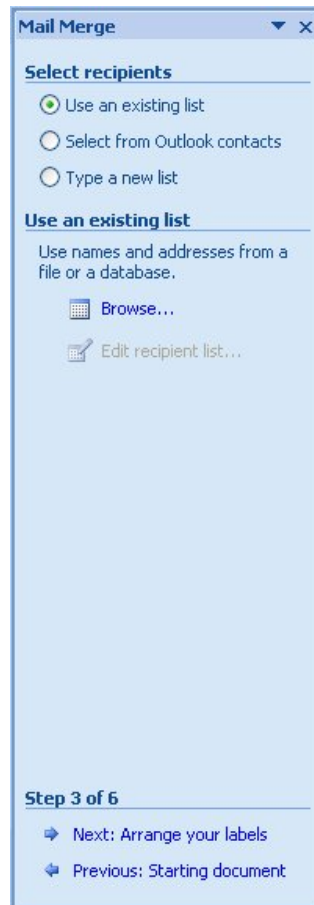
- From the Styles group on the Home tab, select the **No Spacing** style



You are now ready to continue with the wizard.

- Click  **Next: Select recipients**

You have three choices.



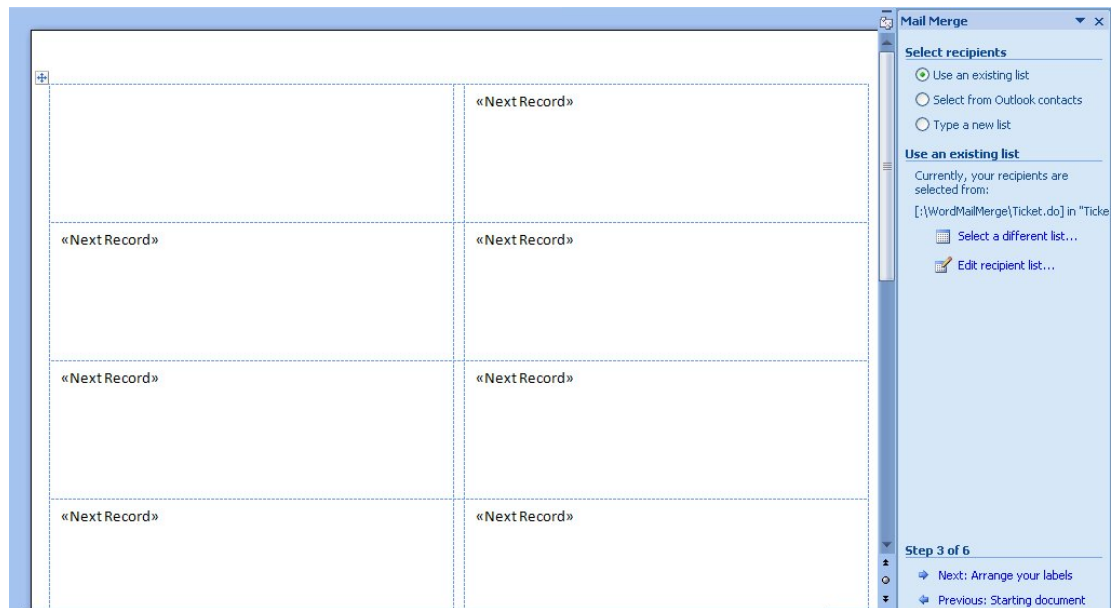
You are going to use an existing list which you need to locate.

- Click **Browse...**
- Open the **Ticket** file in the WordMailMerge folder on drive C

The Mail Merge Recipients dialog box is displayed.

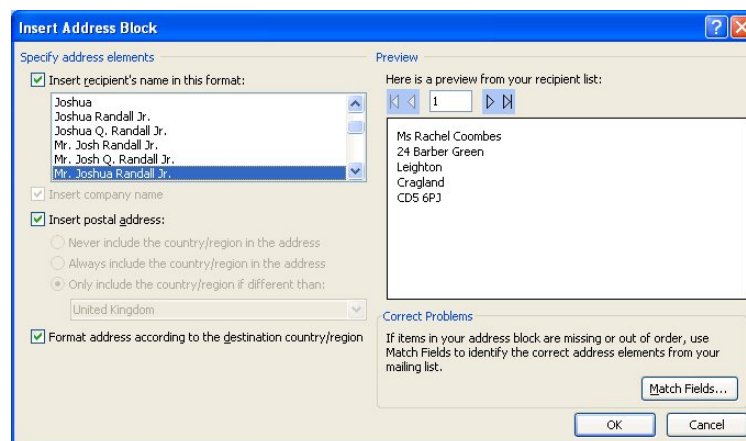
You do not want to make any changes.

- Click **OK**



- Click 

- Click **Address block...**



- Click **OK**

The address block is added to the first label.

To copy the layout of the first label to the other labels on the sheet:

- Click **Update all labels**

The address block is copied to the other labels.

«AddressBlock»	«Next Record»«AddressBlock»
«Next Record»«AddressBlock»	«Next Record»«AddressBlock»
«Next Record»«AddressBlock»	«Next Record»«AddressBlock»
«Next Record»«AddressBlock»	«Next Record»«AddressBlock»

- Click [Next: Preview your labels](#)

Ms Rachel Coombes 24 Barber Green Leighton Cragland CD5 6PJ	Miss Rebecca Martyn 160 Westland Avenue Top Scarr Scarr Hill SD22 4FG
Mr Christopher Janes Kingston House Stoneley Stoneford SD11 6JM	Rev Peter Wright The Vicarage Oakley Stoneford SD11 8VG
Ms Lorraine Deneve 146 Long Road Burkiston Bellwood CD2 3MF	Dr Paul Anstruther Margaret's House Lady Road Roydley CD4 4PB
Mrs Gisella Dzaszyk Easter Cottage Easter Lane Cragland CD5 3NT	Mr Johann Pesendorfer 16 Lake View Terrace Lakeside Loughton CD8 6PW

Mail Merge

Preview your labels

Some of the merged labels are previewed here. To preview another label, click one of the following:

<< Recipient: 1 >>

Find a recipient...

Make changes

You can also change your recipient list:

Edit recipient list...

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

Step 5 of 6

Next: Complete the merge

Previous: Arrange your labels

The data from the Tickets file is merged to the labels.

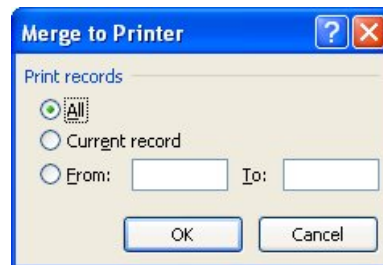
- Click 

The labels are ready to be printed, or you can choose to edit individual labels. You will remember that, if you want to save the labels to use again, you should choose to edit.

You are going to print and, therefore, would normally put labels stationery in the printer at this point. For this exercise, however, you will print the labels on paper.

- Click **Print...**

The Merge to Printer dialog box is displayed.



- Ensure that **All** is selected
- Click **OK**

The Print dialog box is displayed.

- Click **OK**

The labels are printed.

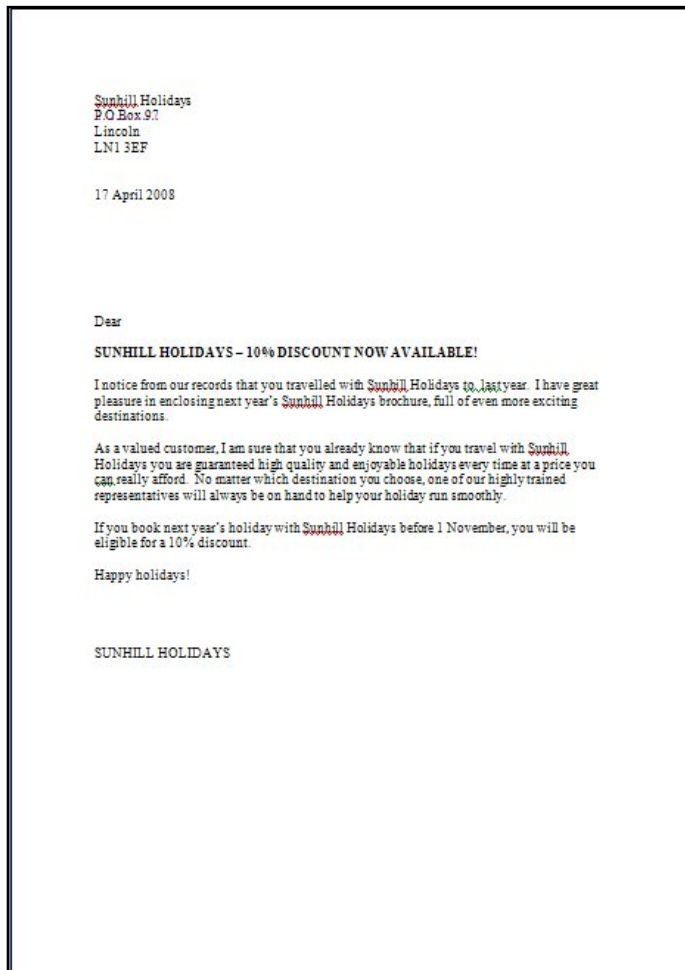
- Close the file without saving

EDITING FIELDS

You are going to perform another mail merge and then learn how to edit the recipient information.

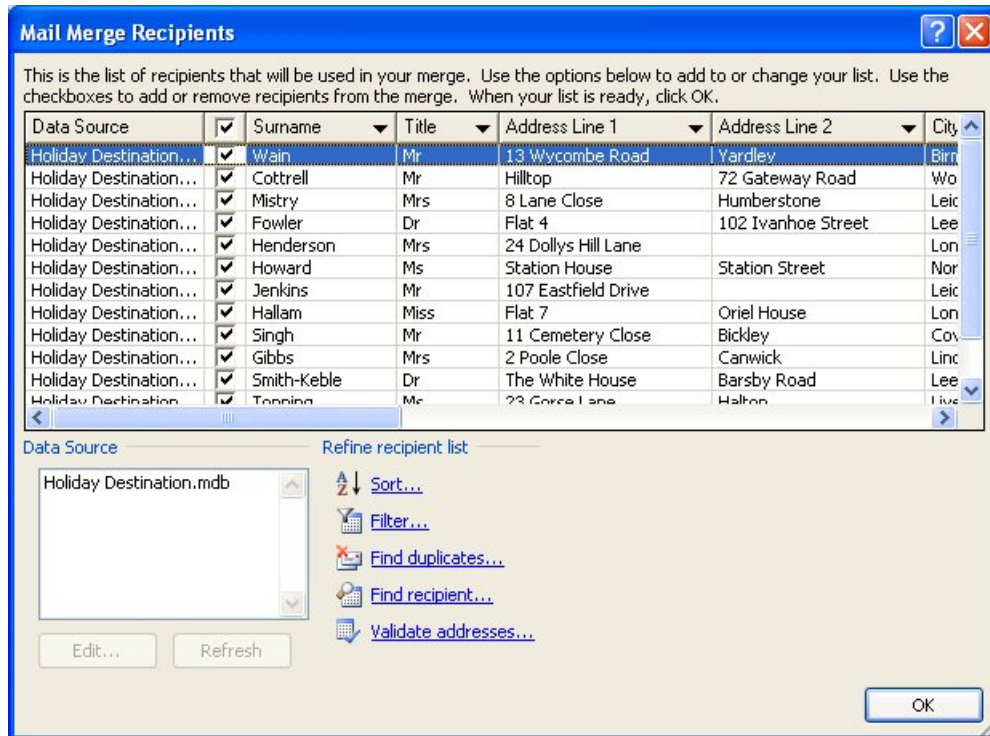
Instead of using the Mail Merge Wizard task pane to locate an existing file, you can instead open the file before starting the wizard.

- From the WordMailMerge folder on drive C, open the file **Sunhill Holidays**



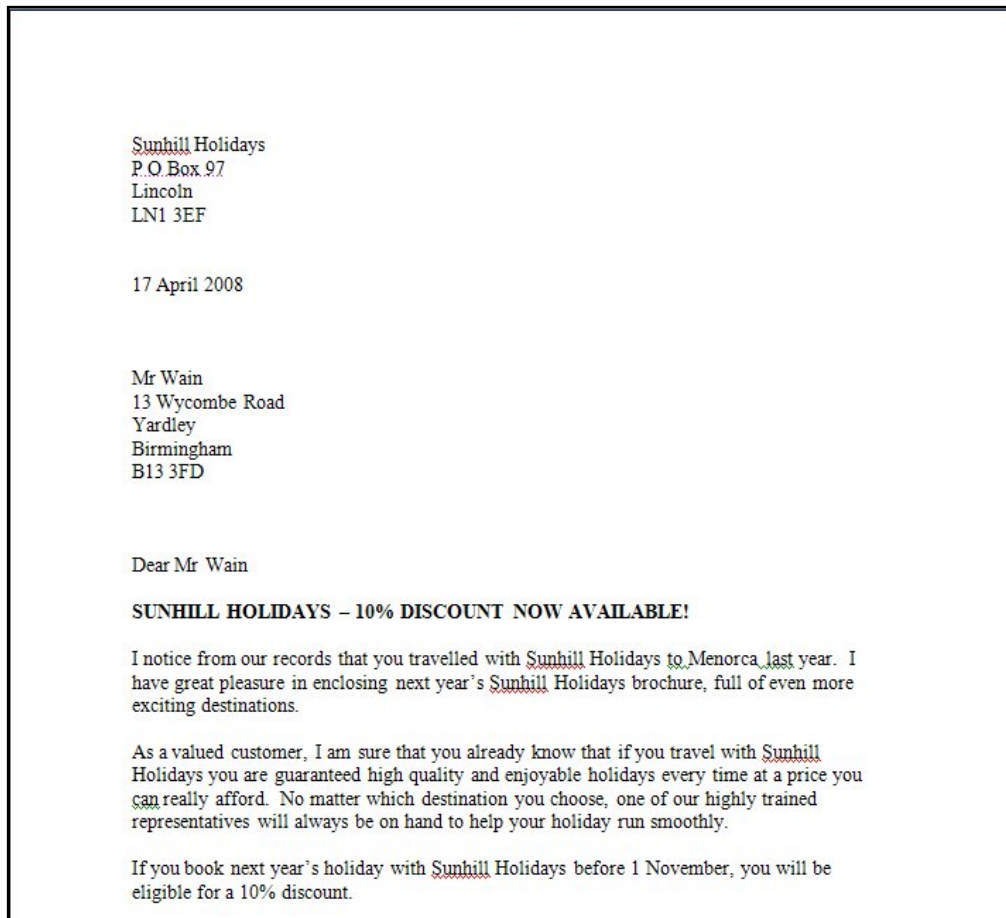
- Start the Mail Merge Wizard
- Select **Letters**
- Select **Use the current document**

- Locate the recipient information in the file **Holiday Destination** in the WordMailMerge folder on drive C.



- Click **OK**
- Insert the **Address block** between the date and “Dear”
- Position the insertion point after “Dear” and insert a space
- Click **More items**
- Insert **Title** and **Surname** and then insert a space between them
- In the first sentence, position the insertion point between “to” and “last” and click **More items**
- Insert **Holiday Destination**

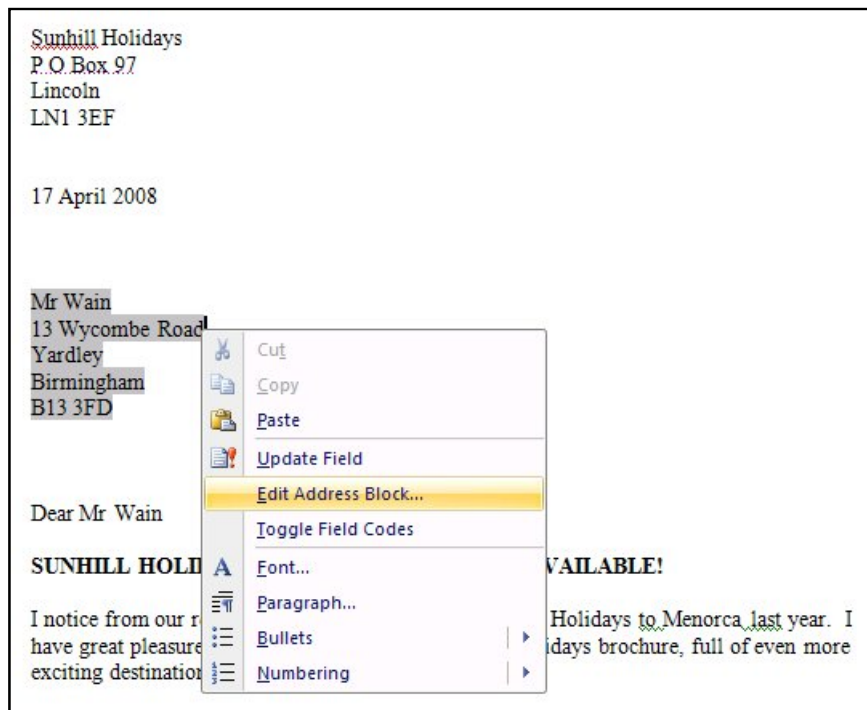
➤ Preview the letters



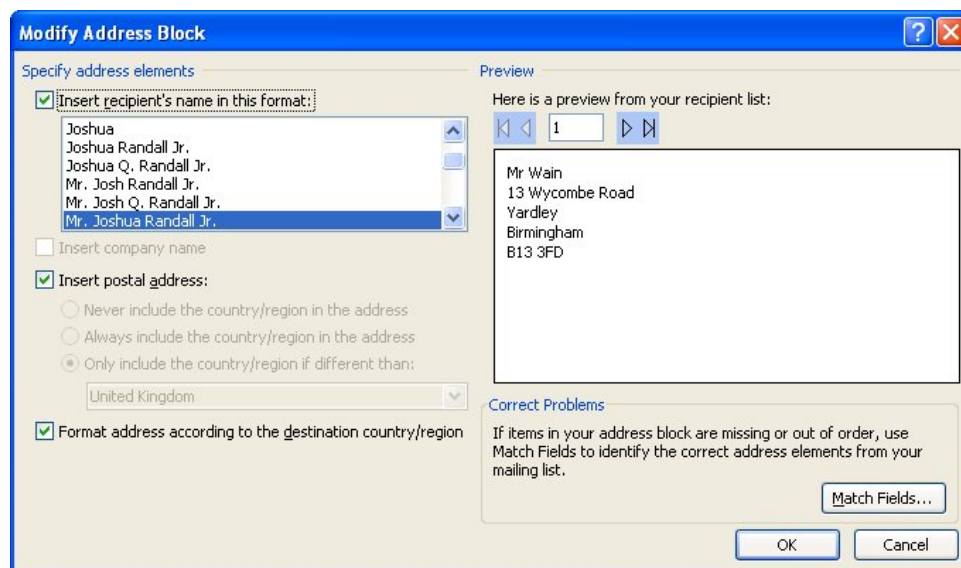
➤ Notice that the recipients' first names are missing from each letter

To find out what is causing this problem, and put it right, you need to edit the address block.

- Point to the address block in the letter and click the right mouse button to see the shortcut menu
- Select **Edit Address Block...**



The Modify Address Block dialog box is displayed.



➤ Click **Match Fields**

The Match Fields dialog box is displayed.

Match Fields

In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component.

Required for Address Block

Courtesy Title	Title
First Name	(not matched)
Last Name	Surname
Suffix	(not matched)
Address 1	Address Line 1
Address 2	Address Line 2
City	City
State	(not matched)
Postal Code	Postcode
Country or Region	(not matched)

Optional information

Unique Identifier	(not matched)
-------------------	---------------

Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)

☐ Remember this matching for this set of data sources on this computer

OK Cancel

When you previewed the letters, the Wizard looked at the file containing the source data, in this case **Holiday Destination**, and attempted to match the field names in that file with the **Required for Address Block** merge fields.

You can see the results of the Wizard's work in the Match Fields dialog box.

For example the Wizard has correctly paired the Surname field in Holiday Destination with Last Name.

However, the First Name field is shown as **(not matched)**. This means that the Wizard was not able to identify a suitable field to match with First Name. You need to have a look at the fields that are available and select one that can be used for a first name.

- Click the down arrow in the First Name field

Match Fields

In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component

Required for Address Block

Courtesy Title: Title
First Name: (not matched)
Last Name: Title
Suffix: Initials
Address 1: Surname
Address 2: Address Line 1
City: Address Line 2
State: Address Line 3
Postal Code: City
Country or Region: County
Unique Identifier: Postcode
Home Phone: Home Phone
E-mail Address: E-mail Address
Holiday Destination: Holiday Destination
(not matched)

Use the drop-down lists to choose the field that corresponds to the address information (listed on the left.)

☐ Remember this matching for this set of data sources on this computer

OK Cancel

All of the field names in the Holiday Destination file are displayed, and you can see that, although there is not a 'first name' field, there is an 'Initials' field.

- Select **Initials**

Match Fields

In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component

Required for Address Block

Courtesy Title: Title
First Name: (not matched)
Last Name: Title
Suffix: Initials
Address 1: Surname
Address 2: Address Line 1
City: Address Line 2
State: Address Line 3
Postal Code: City
Country or Region: County
Unique Identifier: Postcode
Home Phone: Home Phone
E-mail Address: E-mail Address
Holiday Destination: Holiday Destination
(not matched)

Use the drop-down lists to choose the field that corresponds to the address information (listed on the left.)

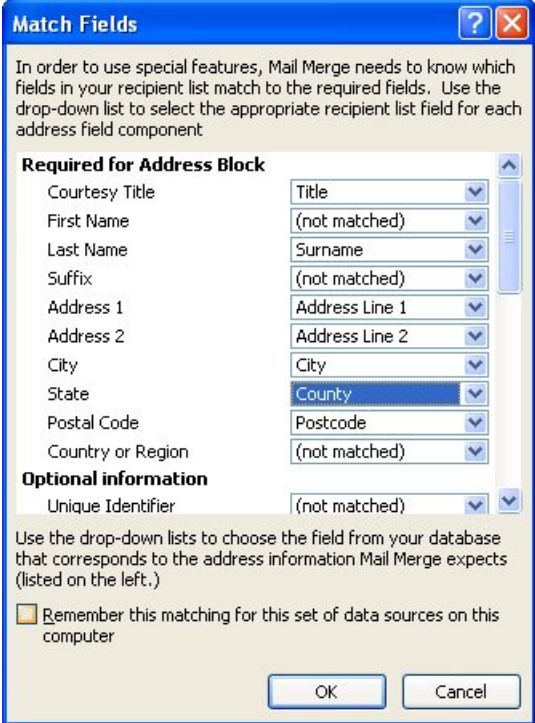
☐ Remember this matching for this set of data sources on this computer

OK Cancel

Instructing the Wizard to use this field in place of a first name field will ensure that the recipients' initials are included in the mail merge.

Another field in the Holiday Destination file is **County**. Notice that the list of required information includes 'State'. You are going to specify that the County field is used where the Wizard expects to find the state.

- Click the down arrow in the State field and select **County**

The image shows a 'Match Fields' dialog box with a blue title bar and standard Windows window controls. The main text explains that Mail Merge needs to know which fields in the recipient list match the required fields. It lists 'Required for Address Block' fields: Courtesy Title, First Name, Last Name, Suffix, Address 1, Address 2, City, State, Postal Code, and Country or Region. Each has a corresponding dropdown menu. The 'State' dropdown is currently open, showing 'County' as the selected option. Below this is the 'Optional information' section with a 'Unique Identifier' dropdown. At the bottom, there is a checkbox labeled 'Remember this matching for this set of data sources on this computer' and 'OK' and 'Cancel' buttons.

Match Fields

In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component

Required for Address Block

Courtesy Title	Title
First Name	(not matched)
Last Name	Surname
Suffix	(not matched)
Address 1	Address Line 1
Address 2	Address Line 2
City	City
State	County
Postal Code	Postcode
Country or Region	(not matched)

Optional information

Unique Identifier	(not matched)
-------------------	---------------

Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)

☐ Remember this matching for this set of data sources on this computer

OK Cancel

- Click **OK**
- Click **OK**

The address block in the letter now displays the recipient's initial(s) and the county.

Sunhill Holidays
P O Box 97
Lincoln
LN1 3EF

17 April 2008

Mr J Wain
13 Wycombe Road
Yardley
Birmingham
W Midlands
B13 3FD

Dear Mr Wain

SUNHILL HOLIDAYS – 10% DISCOUNT NOW AVAILABLE!

I notice from our records that you travelled with Sunhill Holidays to Menorca last year. I have great pleasure in enclosing next year's Sunhill Holidays brochure, full of even more exciting destinations.



- Complete the merge
- Click **Edit individual letters....**
- Click **OK** to merge all of the records
- Browse through the letters to check them
- Save the file in the WordMailMerge folder on drive C as **Sunhill Merged Letters**
- Close the Sunhill Holidays file without saving

CREATING A MAIN DOCUMENT

During this training session you have used files that have been provided for you.

To reinforce what you have previously learned, you are going to use the Wizard to create your own main document and data source.

- Open a new document
- Start the Mail Merge Wizard
- Ensure **Letters** is selected
- Ensure **Use the current document** is selected
- Type the following letter:

Celebration Caterers Ltd
Unit 10
Abbney Road East
Kings Lynn
Norfolk
PE28 6KG

Insert today's date

PARTY BOOKING CONFIRMATION

I write to confirm receipt of your instructions regarding the office party is intending to provide for its staff.

The details have been forwarded to the local branch of our company, and the manager will contact you shortly to finalise the plans.

May I take this opportunity to wish you all a very pleasant evening.

Yours sincerely

Margo Gough
Corporate Entertainment

- Save the document in the WordMailMerge folder on drive C with the filename **Confirmation Letter**

With the Main document prepared, you are ready to create the data source file.

- Select the next step in the wizard

CREATING A DATA SOURCE

A data source may be any sort of file that contains the information to be merged into a document. For example you could use a Word table, an Excel worksheet, an Access database, or a Microsoft Outlook Contact List.

If the data source does not already exist, the Mail Merge Wizard offers you the option of creating a new list which is then saved as a database (.mdb) file.

- Select **Type a new list**
- Click **Create...**

The New Address List dialog box is displayed.

Title	First Name	Last Name	Company Name	Address Line 1

- Scroll across to view the default fields that are provided

You can use the fields that are offered, or you can customise them.

Notice that Title, First Name and Last Name are separate fields.



IMPORTANT TO REMEMBER

Inputting each section of a recipient's name into individual fields allows you flexibility when it comes to addressing him or her.

For example, if you have a record for Ms Natalie Wood, you can combine the first three fields to make 'Ms Natalie Wood', while using Title and Last Name together gives you 'Ms Wood'. As the First Name is a separate field, if you know her well, your letter can begin 'Dear Natalie'.

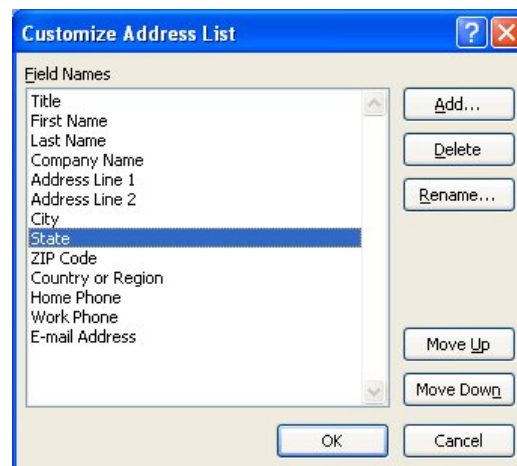
REMOVING A FIELD

The field **State** is not required.

- Click **Customize Columns...**

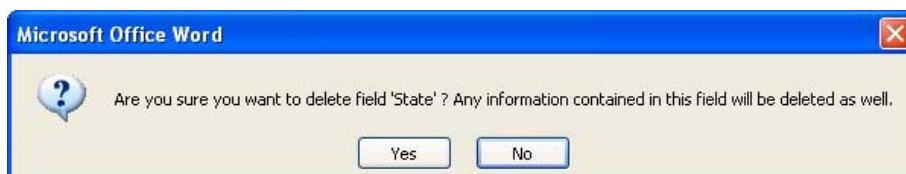
The Customize Address List dialog box is displayed.

- Select **State**



- Click **Delete**

A warning message is displayed.



Deleting a field might have repercussions if it already contains data.

You have not yet entered any data into the State field so it is safe to delete it.

- Click **Yes**

The State field is removed from the New Address List dialog box.



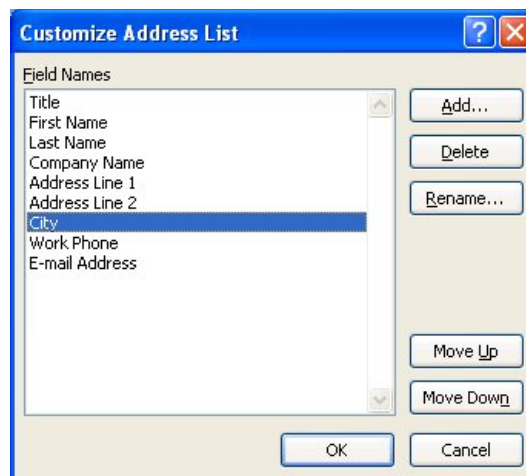
- Delete the **ZIP Code**, **Country or Region** and **Home Phone** fields

ADDING A FIELD

You are going to add a new field **County**, which will be positioned immediately below the City field.

From the Customize Address List dialog box:

- Select the **City** field



- Click **Add**

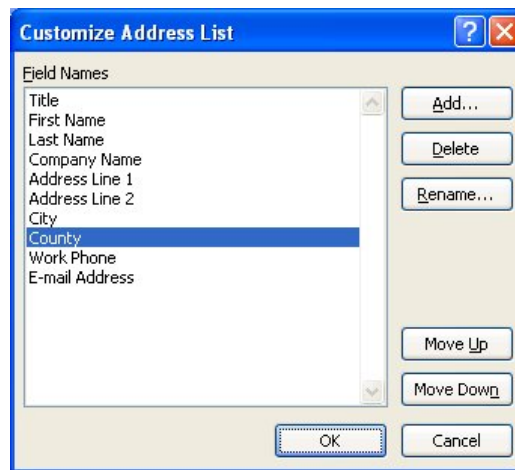
The Add Field dialog box is displayed.

- Type **County**



- Click **OK**

The County field is added to the list of field names.



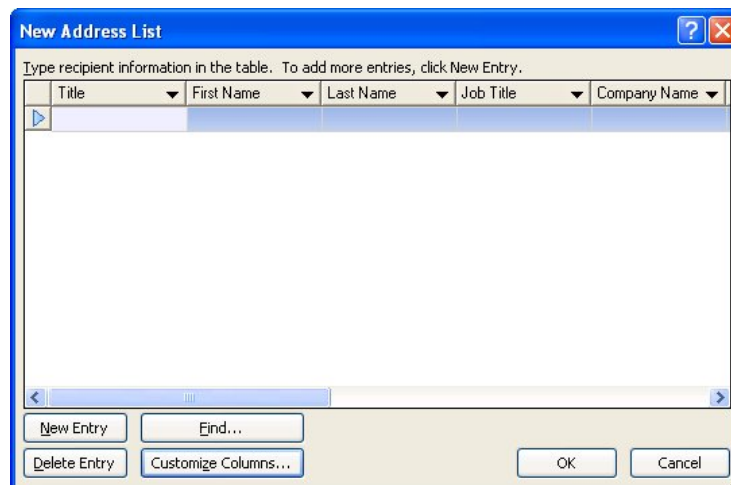
To reposition a field:

- Select the field name and use the **Move Up** and **Move Down** buttons



- Add a new field **Job Title** and position it below Last Name
- Add a new field **Postcode** and position it below County
- Click **OK**

The New Address List dialog box is displayed with the amended field names.



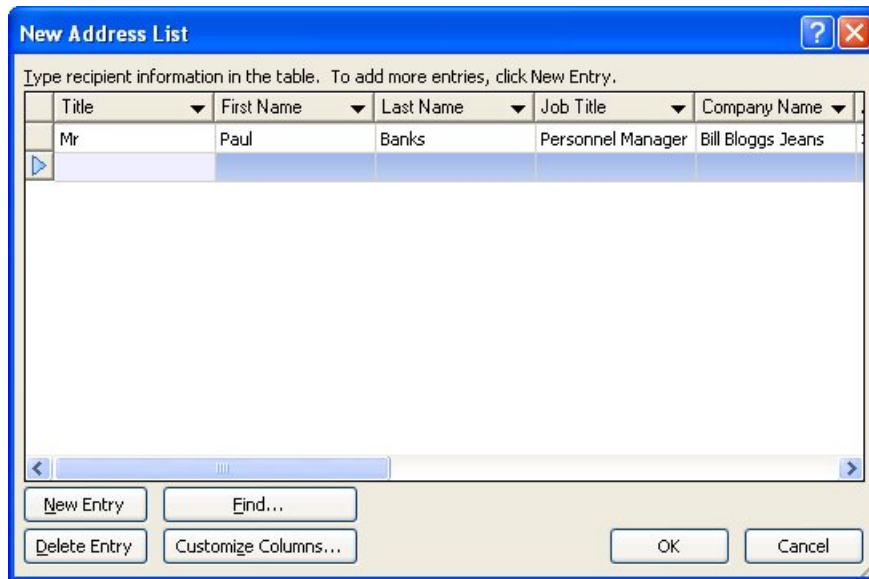
ENTERING DATA

- Enter the following record into the address list, remembering to input each part of the recipient's name, address, and other details (where available) into the relevant field

Title	Mr
First Name	Paul
Last Name	Banks
Job Title	Personnel Manager
Company Name	Bill Bloggs Jeans
Address Line 1	32-36 Oxford Road
Address Line 2	
City	Norwich
County	Norfolk
Postcode	NR2 6RT
Work Phone	01548 655455
E-mail Address	paul.banks@bbloggs.co.uk

- Click **New Entry** or press the **Tab** key to move to the next record

The result should look like this:



The screenshot shows a dialog box titled "New Address List" with a blue title bar and standard Windows window controls. Inside the dialog, there is a text instruction: "Type recipient information in the table. To add more entries, click New Entry." Below this is a table with five columns: Title, First Name, Last Name, Job Title, and Company Name. The first row of the table contains the data: Mr, Paul, Banks, Personnel Manager, and Bill Bloggs Jeans. Below the table is a large empty text area. At the bottom of the dialog, there are four buttons: "New Entry", "Find...", "Delete Entry", and "Customize Columns...". On the right side of the dialog, there are "OK" and "Cancel" buttons.

Title	First Name	Last Name	Job Title	Company Name
Mr	Paul	Banks	Personnel Manager	Bill Bloggs Jeans



- Add the records below, clicking the **New Entry** button or the Tab key at the end of each record

Ms Greta Pigg Personnel Manager Atkins Machinery Co Wains Bridge Road Thetford Norfolk IP24 8KL 01543 875333 g.pigg@atkinsmc.co.uk	Mrs Matilda Dawson Sales Manager Derris Construction 76-80 Flowerpot Lane Middleton Norwich Norfolk NR5 9NK 01546 876277 mcd@derriscon.co.uk	Ms Bhupinder Patel Assistant Manager West End Flowers 25 Paisley Road Norwich Norfolk NR2 4HV 01548 675435 enq@wend.co.uk	Mr Peter Piper Personnel Manager Hotstuff Heating Perriwinkle Lane Sproston Norwich Norfolk NR5 8MN 01546 367067 piper@hots.co.uk	Mr Jon Szaja Personnel Manager Wordsmiths plc Century House High Road Cromer Norfolk NR27 0AW 01549 874478 szaja@word.co.uk
--	---	---	--	--

The result looks like this:

New Address List

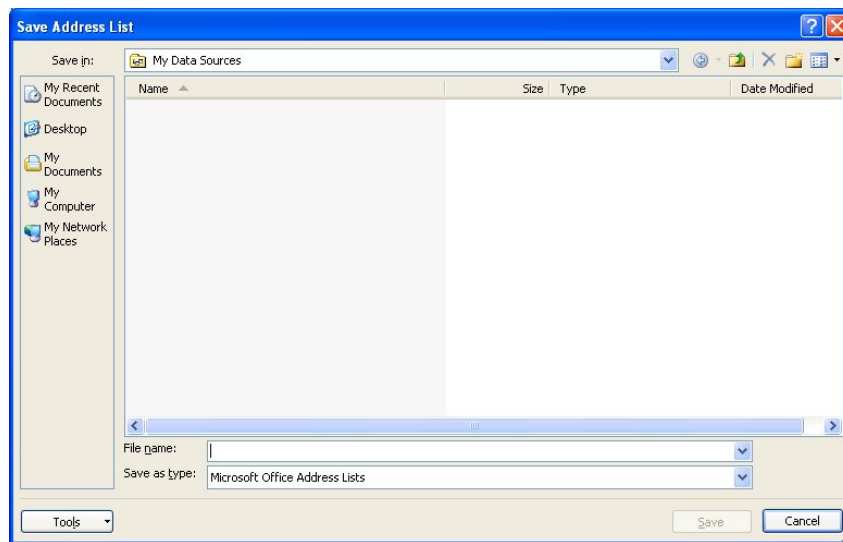
Type recipient information in the table. To add more entries, click New Entry.

Title	First Name	Last Name	Job Title	Company Name
Mr	Paul	Banks	Personnel Manager	Bill Bloggs Jeans
Ms	Greta	Pigg	Personnel Manager	Atkins Machiner...
Mrs	Matilda	Dawson	Sales Manager	Derris Construction
Ms	Bhupinder	Patel	Assistant Manager	West End Flowers
Mr	Peter	Piper	Personnel Manager	Hotstuff Heating
Mr	Jon	Szaja	Personnel Manager	Wordsmiths plc

Buttons: New Entry, Find..., Delete Entry, Customize Columns..., OK, Cancel

- Once you have input all of the records into the address list, click **OK**

The Save Address List dialog box is displayed.

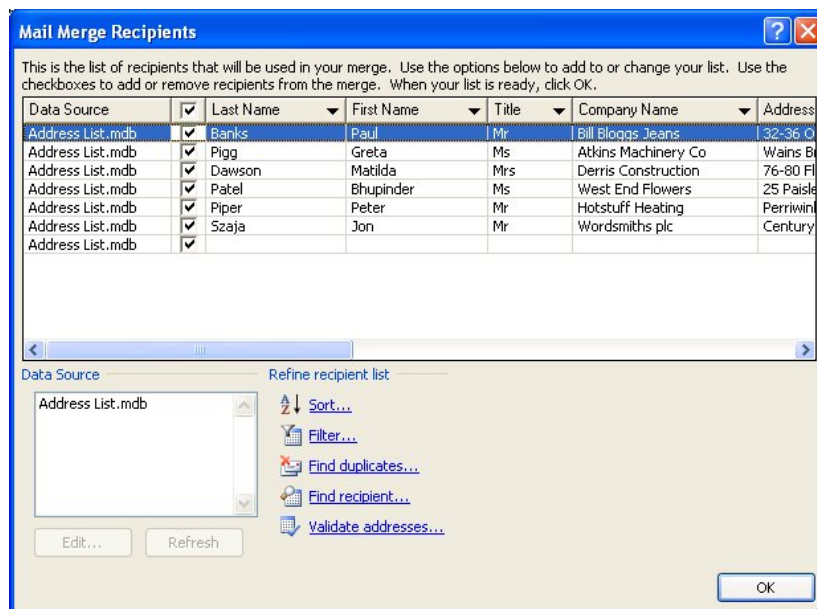


Word automatically offers you the **My Data Sources** folder in which to store the address list.

However, for the purpose of this course:

- Save the list in the WordMailMerge folder on drive C as **Address List**

The Mail Merge Recipients dialog box is displayed.



- Click **OK**

- Click **Next: Write your letter**

ADDING RECIPIENT INFORMATION TO THE LETTER

Once the data source file is ready, you can insert the recipient information into the appropriate places in the letter.

Word uses the Address block and Greeting line fields to insert the basic information for each recipient:

- **Address block** is a placeholder for the name and address
- **Greeting line** is a placeholder for your chosen salutation

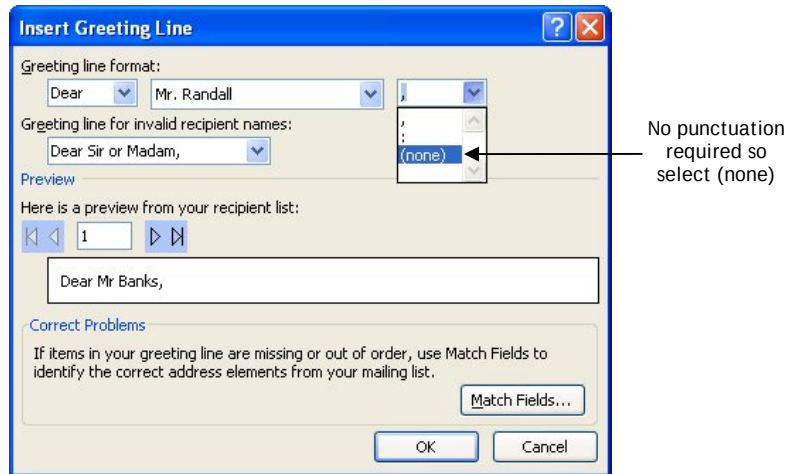
Additionally you can use:

- **Electronic postage**, which is only available if you have installed an electronic postage program
- **More items** – which shows you a list of all of the fields in the data source from which you can select the fields you want to insert



- Position the insertion point on a blank line between the date and 'PARTY BOOKING CONFIRMATION' and insert an Address block
- Press **Enter** three times

- Position the insertion point on a blank line before 'PARTY BOOKING CONFIRMATION' ready to add a salutation
- Click **Greeting line...**
- Before you click OK and close the dialog box, click the down arrow next to the punctuation box and select **None**



- Click **OK**
- Insert the **Company Name** field in the first sentence of the letter between "party" and "is"

➤ Preview the letters

Celebration Caterers Ltd
Unit 10
Abbney Road East
Kings Lynn
Norfolk
PE28 6KG

28 April 2008

Mr Paul Banks
Bill Bloggs Jeans
32-36 Oxford Road
Norwich
NR2 6RT

Dear Mr Banks

PARTY BOOKING CONFIRMATION

I write to confirm receipt of your instructions regarding the office party Bill Bloggs Jeans is intending to provide for its staff.

The details have been forwarded to the local branch of our company, and the manager will contact you shortly to finalise the plans.

May I take this opportunity to wish you all a very pleasant evening.

Yours sincerely

Margo Gough
Corporate Entertainment

SELECTING RECORDS TO MERGE

Unless you instruct Word otherwise, all of the records from the data source file will be used when you merge it with the main document.

You may, however, want to select certain records to be printed, for example only those recipients who work for a particular company, or female recipients only.

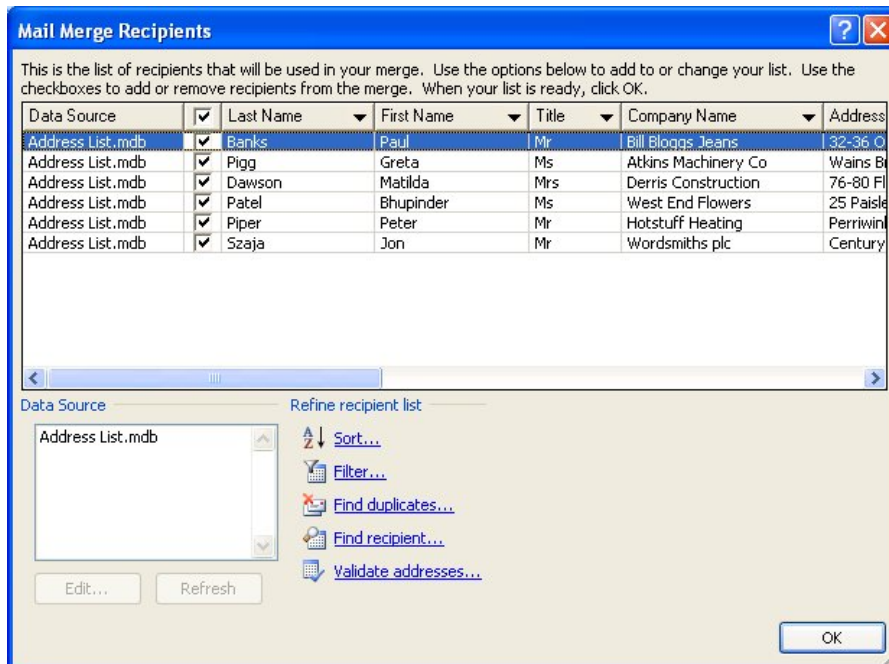
Do bear in mind that if you want to use the latter criterion, you will need to ensure that you include a gender field in the data source. You can, of course select records by the Title field, but if you have titles which can be used by both men and women, such as Doctor or Professor, Mail Merge will not be able to distinguish which recipients are male and which female. Additionally, women may be referred to by several different titles: Ms, Miss or Mrs, and if you are using Title as the criterion, you will need to include all possibilities in your selection.

For this exercise, you are going to select the records for companies based in Norwich.

In the task pane:

- Click **Edit recipient list...**

The Mail Merge Recipients dialog box is displayed.

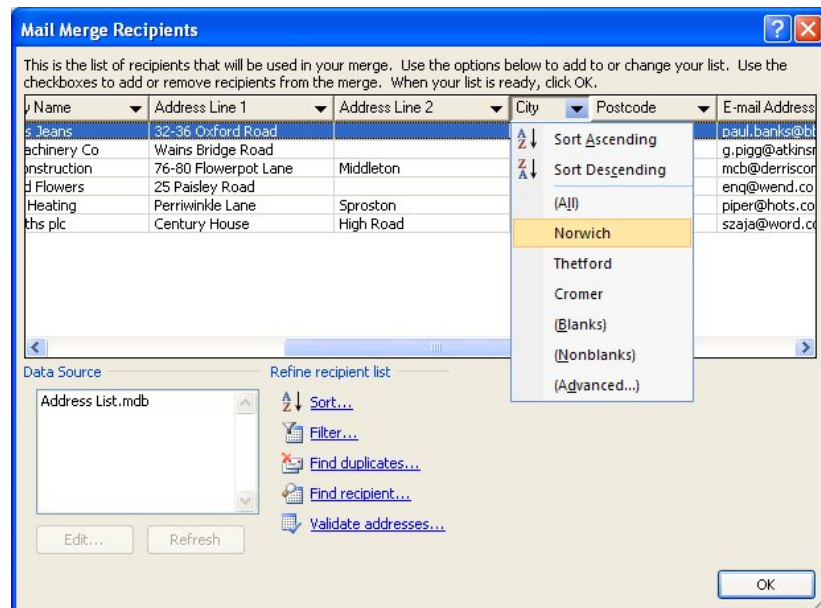


The recipients are listed and currently all selected (the checkboxes are ticked).

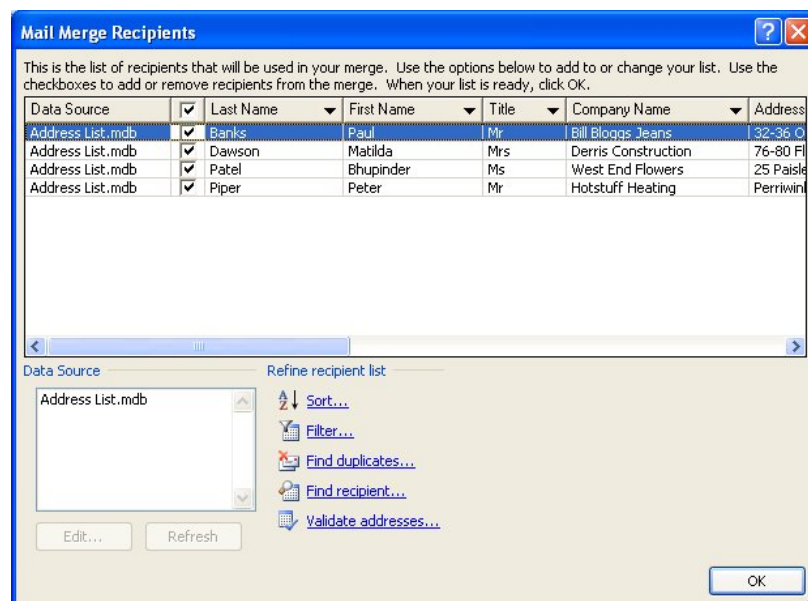
Notice that there are both Sort and Filter options available in the **Refine recipient list** section at the bottom of the dialog box.

However, you can also access these options by clicking the down arrow next to a column heading.

- Scroll across to the **City** field
- Click the down arrow next to the **City** column heading
- Select **Norwich** from the list

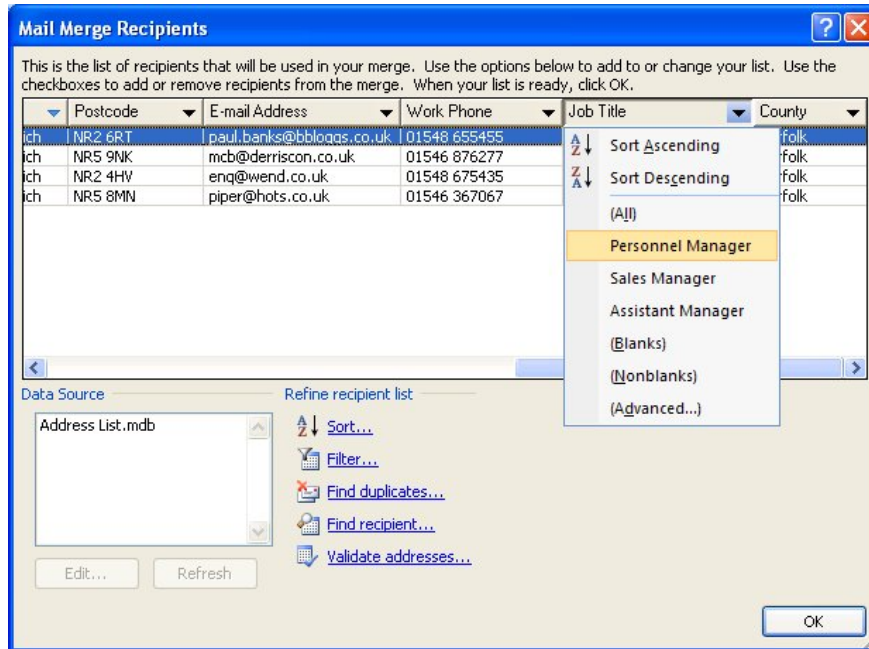


The list of recipients displays only those records where the City is 'Norwich'.

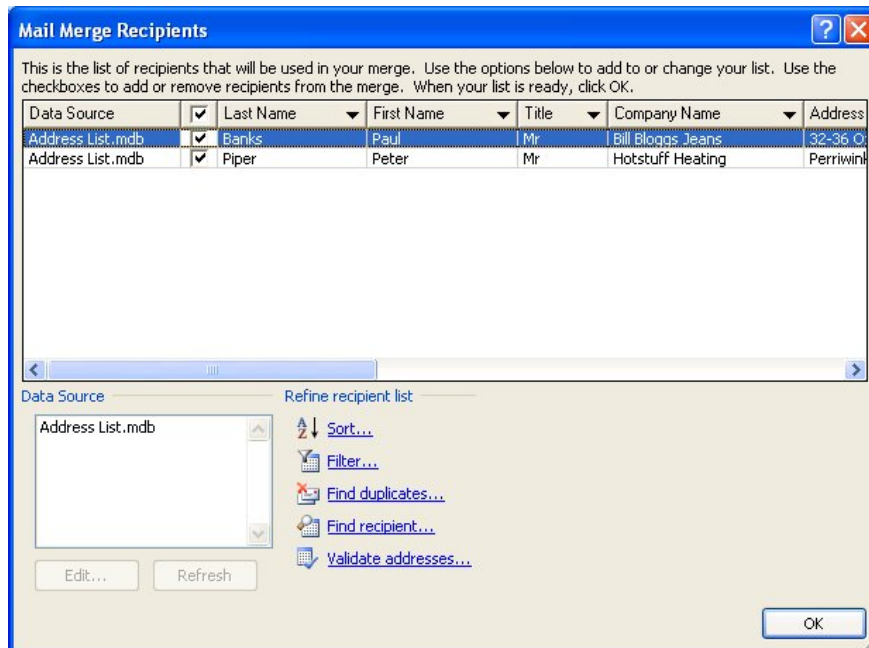


You can narrow the selection further by including a filter in the **Job Title** field.

- Click the down arrow next to the **Job Title** column heading
- Select **Personnel Manager** from the list



The resulting selection shows the recipients that fit the filtered criteria (records that have Norwich as the city and Personnel Manager as the job title).



- Click **OK**



To remove a filter from a field, click the down arrow and select **(All)**.

- Click 

- Click **Edit Individual Letters**

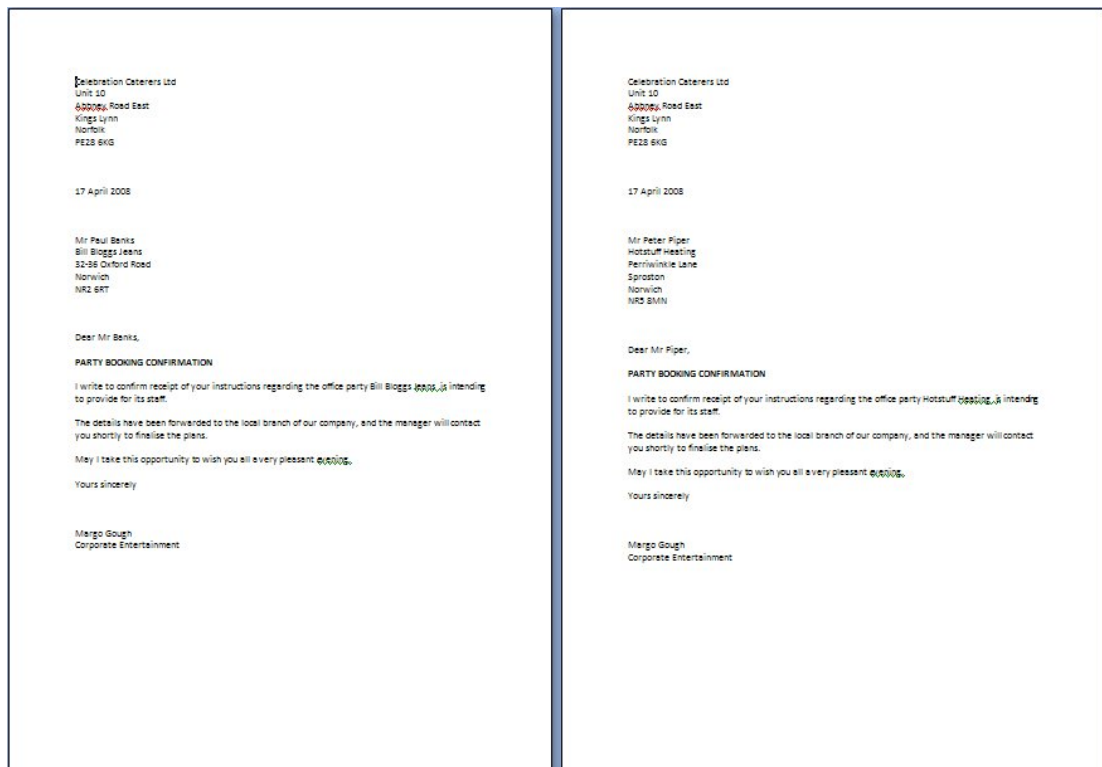
- Click **OK**

The merge takes place and the results are displayed in a file named **Letters1**.

- Select the **View** tab

In the Zoom group:

- Click **Two Pages**



Zoom

Drag the Zoom slider to the left until all pages in the document are displayed.



You can, if necessary, work your way back through the wizard to edit your selection, main document, or data source.

As you are going to edit your selection, you need to close the preview document currently displayed.

- Close **Letters1** without saving

EDITING A DATA SOURCE

You will probably want to edit your data source at some point, perhaps to add, amend, or delete a record.

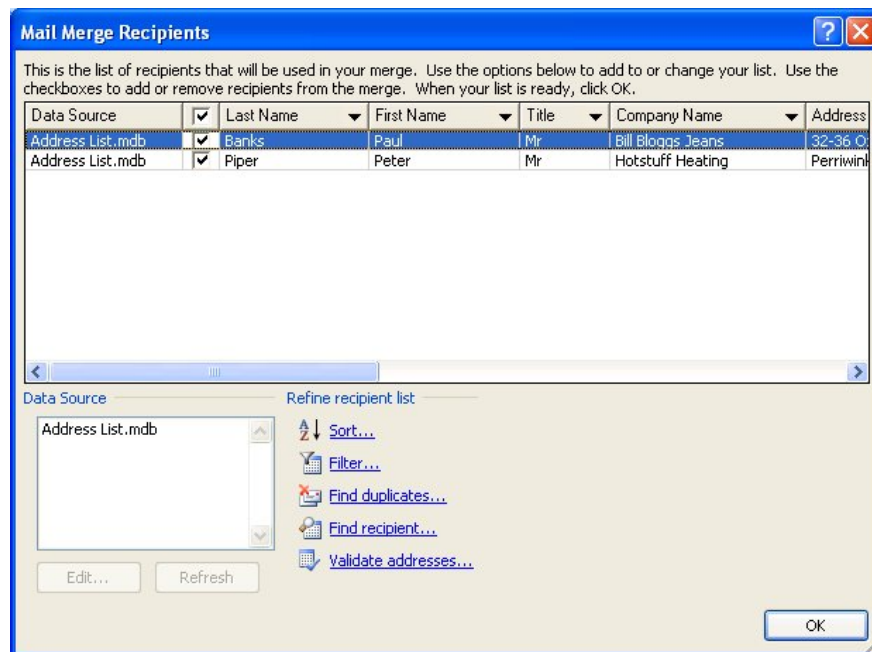
If your data source is a Word table, an Excel worksheet, an Access database, or a Microsoft Outlook Contact List, you can simply open it up in the relevant application and make your amendments.

If you have created an Office Address List, the data is stored in a database format. You can either edit it using the tools in the Mail Merge Wizard, or by opening it in Access. We shall be using the Mail Merge Wizard to edit the Office Address list.

ADDING A RECORD

- Click **Previous: Preview your letters**
- Click **Edit recipient list....**

The Mail Merge Recipients dialog box is displayed showing the filtered records.



- Remove the filters from the Job Title and City fields (see page 53)

In the **Data Source** section at the bottom of the dialog box:

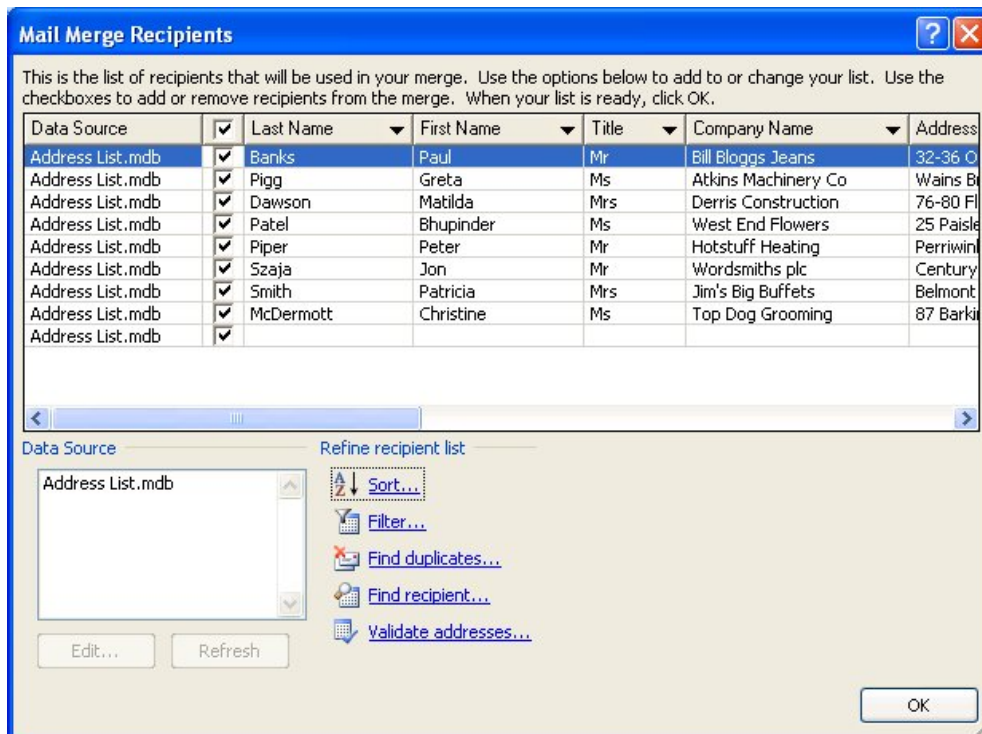
- Click **Address List.mdb**

- Click **Edit**
- Click into the blank record at the bottom of the list or, if there is not a blank record, click **New Entry** to create one
- Add the following records

Mrs Patricia Smith Catering Manager Jim's Big Buffets Belmont Tower Bakewell Square Thetford Norfolk IP24 5JN 01543 876976 psmith@jimsbb.co.uk	Ms Christine McDermott Manager Top Dog Grooming 87 Barking Lane Cromer Norfolk NR27 9XA 01546 772272 christine@tdgrooming.co.uk
---	--

When you have entered the two records:

- Click **OK**
- Click **Yes**



FINDING A RECORD

When there are more records in the Address List than can be viewed at one time in the Mail Merge Recipients dialog box, a vertical scroll bar is displayed so that you can move up and down the list.

However, you can also use **Find** to help locate the record that you want.

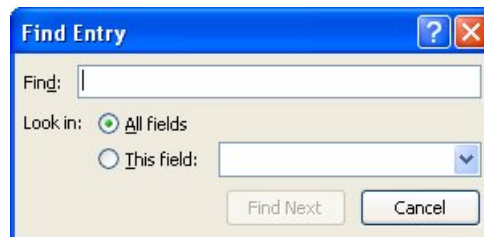
You are going to search for Patricia Smith's record.

- Ensure that the **Mail Merge Recipients** dialog box is still open

In the **Refine recipient list** section at the bottom of the dialog box:

- Select **Find recipient....**

The Find Entry dialog box is displayed.



In the **Find** window you enter text that is unique to the record you are searching for.

- Type **smith**

The **Look in: All fields** option is selected by default, and this will search every field in the data source for 'smith'.

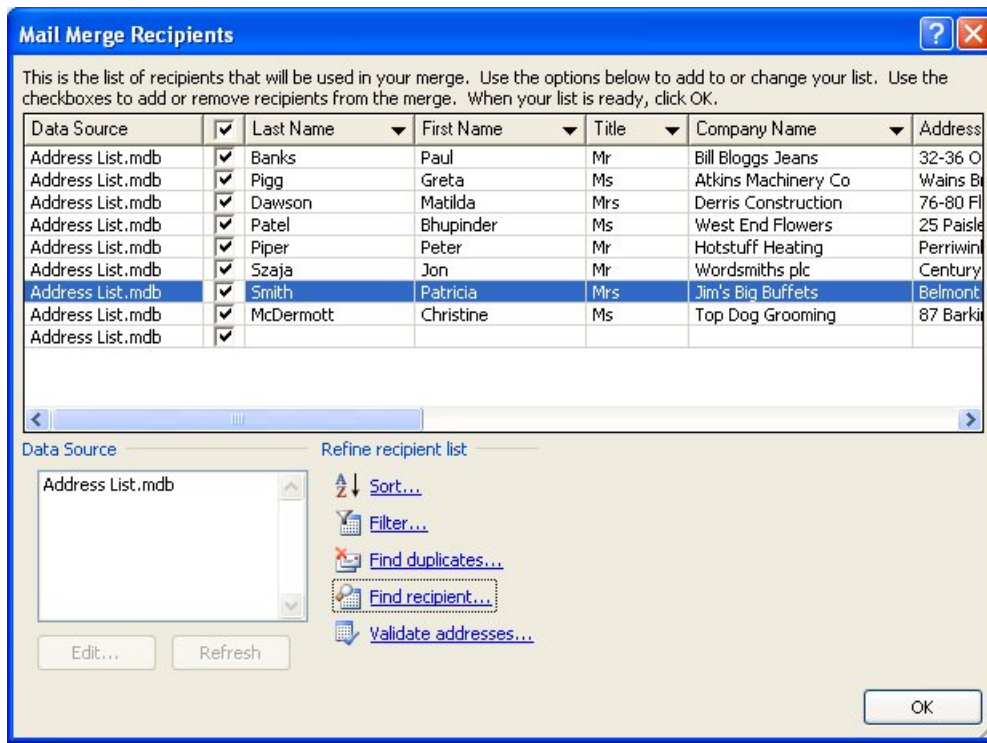
To narrow the search:

- Select the option **This field**
- Click the down arrow and select **Last Name**



- Click **Find Next**

The first record that matches your criterion is displayed.



If the record is not the one that you want – say there are several Smiths in the data source file - click the **Find Next** button to select the next record that matches your criterion.

As there is only one record with 'smith' in the Last Name field:

- Click **Cancel**

AMENDING A RECORD

Next you are going to find a record and edit it, so need to open the data source.

In the **Data Source** section at the bottom of the dialog box:

- Click **Address List.mdb**
- Click **Edit**

The Edit Data Source dialog box is displayed.

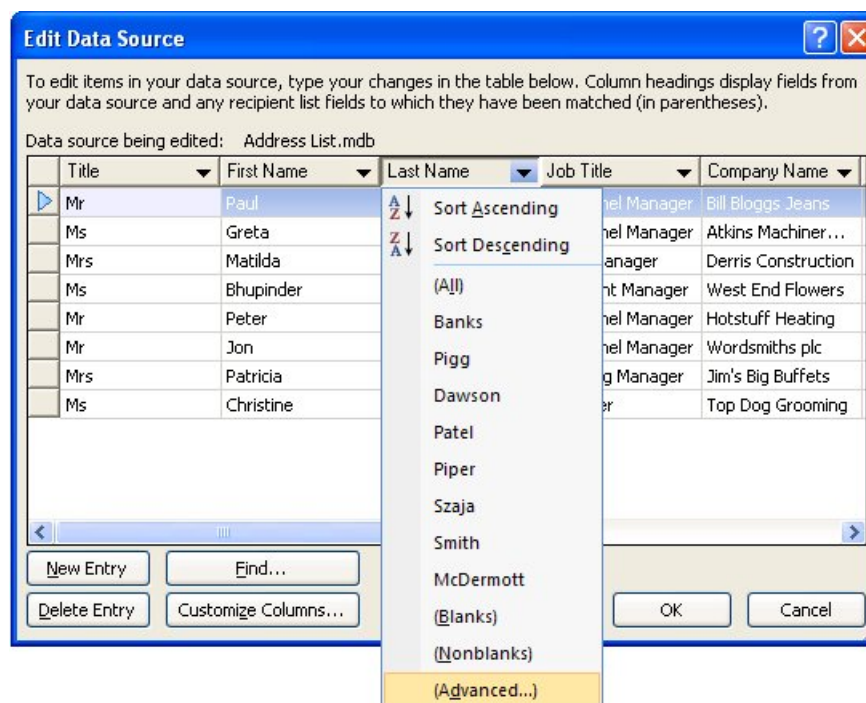


Notice that there is a Find button which you could use but, while writing this training guide, it has been our experience that you need to be vigilant if you do.

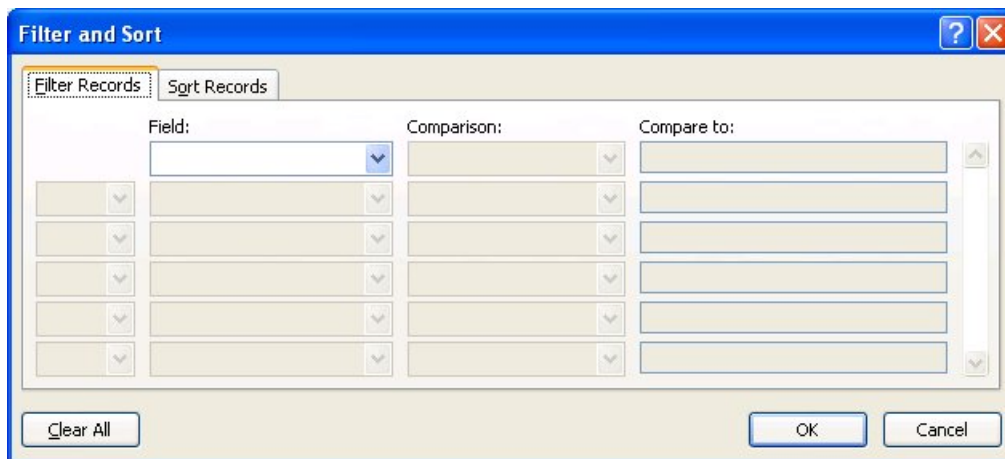
If you use the 'Look in: This Field:' option to locate, for example, specific text in the Last Name field, you may discover that when you close the dialog box you have inadvertently replaced the last name you have found with the last name in the previously highlighted record. The advice, therefore, is to use this facility with caution.

Instead of using the Find option, you will filter the Last Name field.

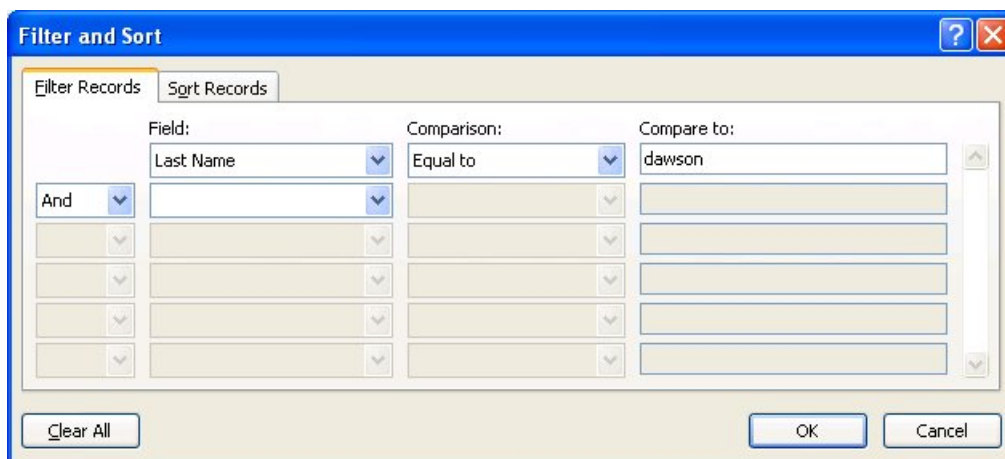
- Click the down arrow next to the **Last Name** column heading
- Select **(Advanced)**



The Filter and Sort dialog box is displayed.

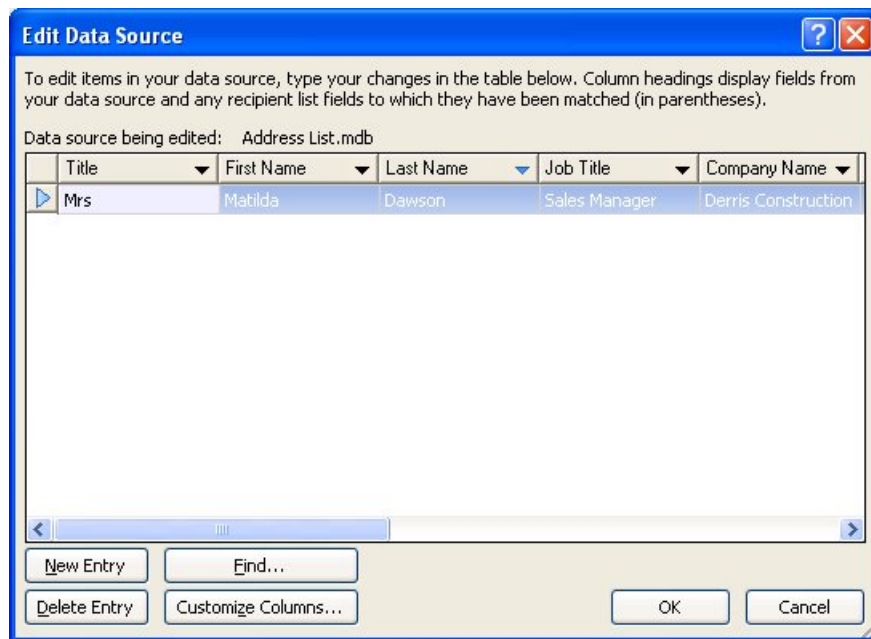


- Click the down arrow in the **Field** column and select **Last Name**
- Leave the **Comparison** field as 'Equal to'
- In the **Compare to** field type **dawson**



- Click **OK**

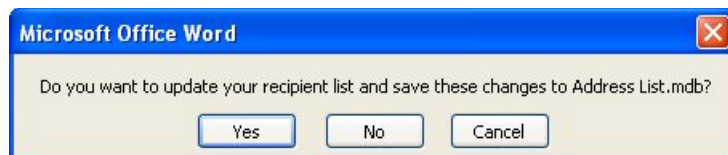
The record that fits your criteria is displayed.



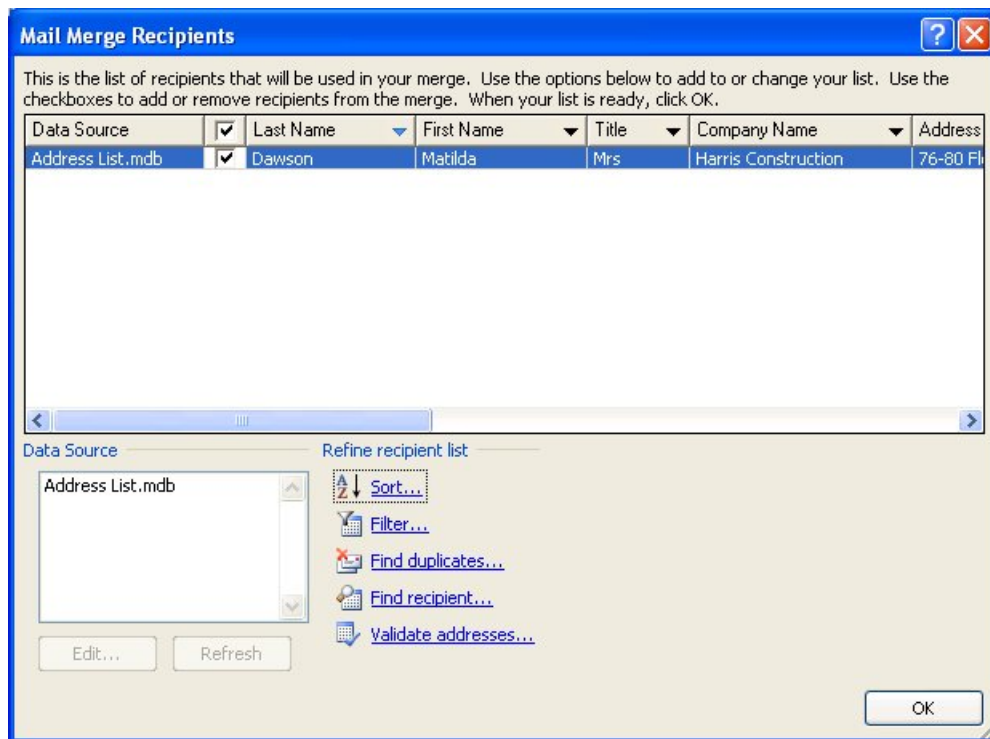
Once you have located the record that you want, you can then edit it.

- Change the name of the company that Matilda works for from Derris Construction to **Harris Construction**
- Click **OK**

You are asked if you want to save the amendment.



- Click **Yes**



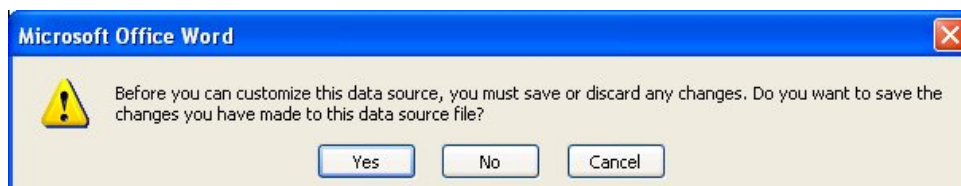
- To see all of the records again, click the down arrow next to the **Last Name** column heading and select **(All)**

ADDING FIELDS

Fields may be added to the data source at any time.

- Ensure the Mail Merge Recipients dialog box is still open
- Click **Address List.mdb**
- Click **Edit**
- Click **Customize Columns...**

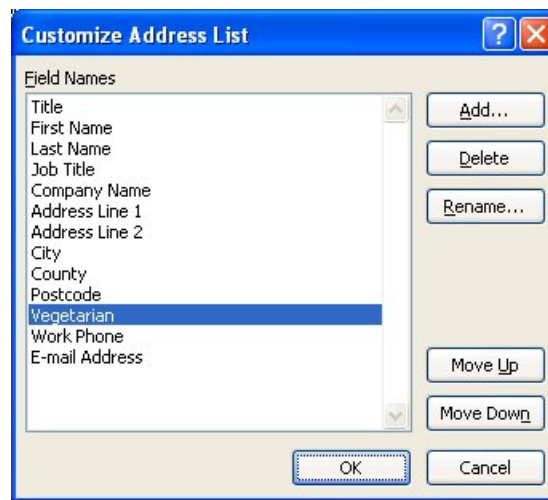
You are asked if you want to save any changes you have made to the data source.



- Click **Yes**

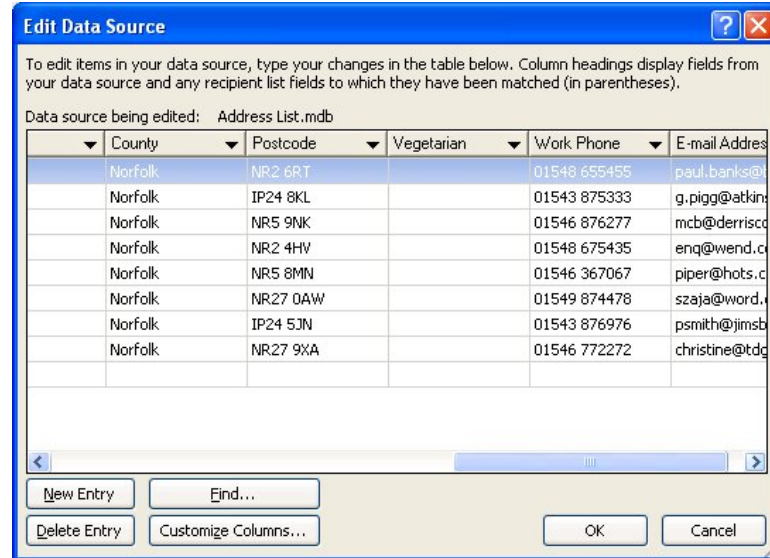
The Customize Address List dialog box is displayed.

- Add a new field named **Vegetarian** and position it below Postcode



- Click **OK**

If you scroll across you will see that the Vegetarian field has been added to the existing records.



- Input the following data:

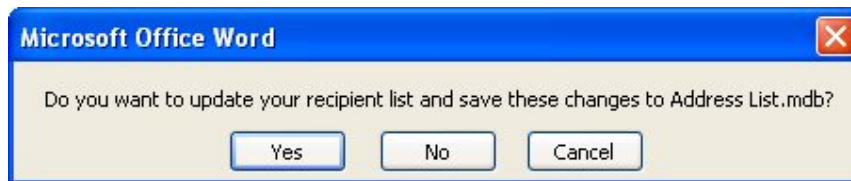
Name	Vegetarian
Mr Paul Banks	No
Ms Greta Pigg	Yes
Mrs Matilda Dawson	Yes
Ms Bhupinder Patel	No
Mr Peter Piper	No
Mr Jon Szaja	Yes
Mrs Patricia Smith	No
Ms Christine McDermott	Yes



To speed up the process, you might consider customising the list so that the Vegetarian field is directly below the Last Name field. This then allows you to see the two fields together without having to scroll across the list. Once you have input the data, return the Vegetarian field to its original position – below the Postcode field.

- Click **OK**

You are asked if you want to update the recipient list and save the changes.



- Click **Yes**
- Click **OK**

USING SPECIAL WORD FIELDS

You have already seen that, when you merge the main document and the data source, the merge fields in the main document are replaced by text from the data source.

In addition to merge fields, you can also place Word fields in a main document and these fields instruct Word to perform an action when the merge occurs.

So, for example, you might be sending a letter to your customers inviting them to attend a seminar which is taking place in both Leicester and Manchester. Your customers are divided into service areas around the country. You want the letters to your customers in service areas 1-3 to give details of the seminar in Leicester, while all of your other customers should receive details of the Manchester event.

By inserting a Word field in the main document, you can specify the text you want to appear in a particular letter which, in this scenario, would obviously depend upon the data in the service areas field.

Specifying text to appear in the merged document

In your letter you want to include a sentence advising those customers who have staff members who are vegetarian that they will be catered for at the dinner party.

For those who have indicated that they do not have any staff members who are vegetarian, an alternative sentence is to be inserted.

The field that you will add to the Confirmation Letter document will check whether the recipient has stated that they have vegetarian staff members or not.

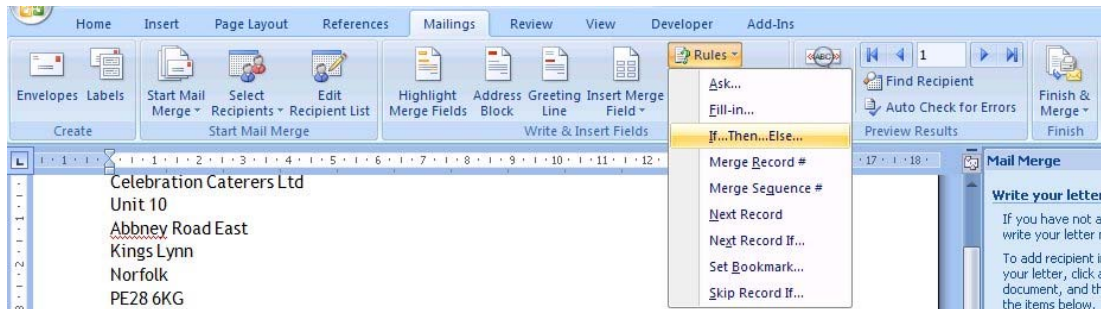
If the field is **Yes**, the letter will include the line 'Both gourmet and vegetarian menus are available.'

If the field is **No**, the letter will state 'A full gourmet menu is available.'

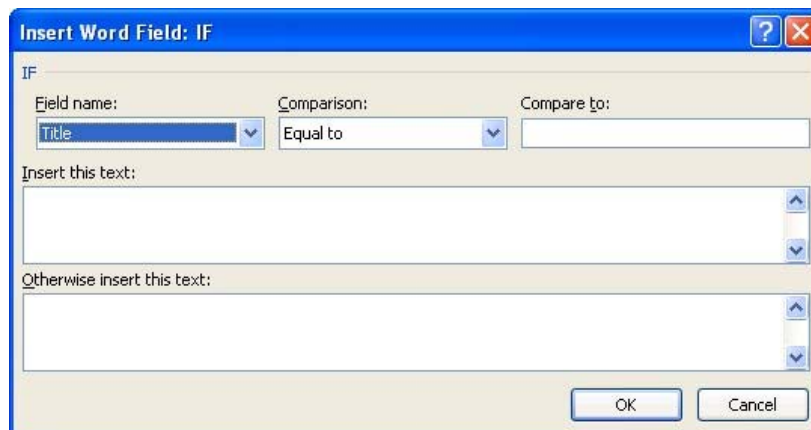
- Ensure you can see the field codes in the Confirmation Letter document (the 'Write your letter' stage – step 4)
- Position the insertion point before the line 'May I take this opportunity to wish you all a very pleasant evening.'

Position here

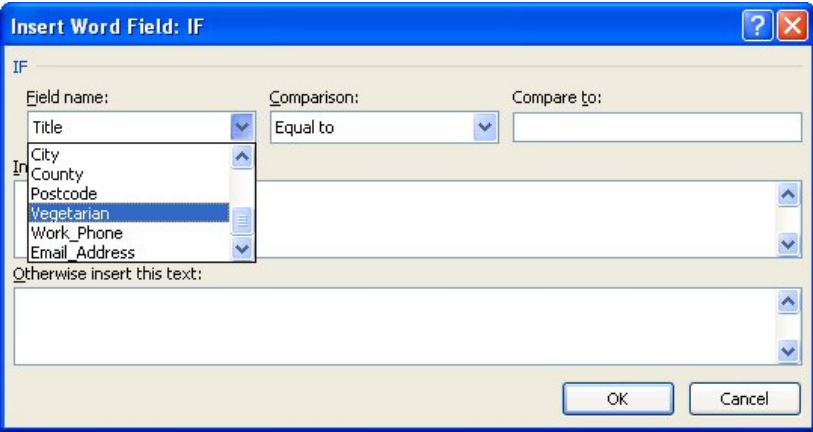
- Press **Enter**
- On the Mailings tab, in the **Write & Insert Fields** group, click the down arrow next to **Rules**
- Select **If...Then...Else...**



The Insert Word Field: IF dialog box is displayed.



- Click the down arrow in the **Field name** window and select **Vegetarian**



Insert Word Field: IF

IF

Field name: Comparison: Compare to:

Title Equal to

City

County

Postcode

Vegetarian

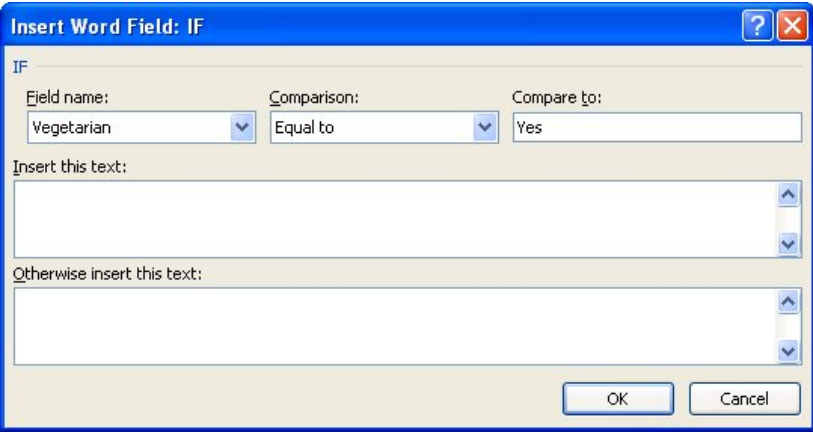
Work_Phone

Email_Address

Otherwise insert this text:

OK Cancel

- Leave the **Comparison** field as **Equal to**
- In the **Compare to** window type **Yes**



Insert Word Field: IF

IF

Field name: Comparison: Compare to:

Vegetarian Equal to Yes

Insert this text:

Otherwise insert this text:

OK Cancel

- In the **Insert this text** window type:
Both gourmet and vegetarian menus are available.
- In the **Otherwise insert this text** window type:
A full gourmet menu is available.

Insert Word Field: IF

IF

Field name: Vegetarian Comparison: Equal to Compare to: Yes

Insert this text:

Both gourmet and vegetarian menus are available.

Otherwise insert this text:

A full gourmet menu is available.

OK Cancel

- Click **OK**

The Word field is inserted into Confirmation Letter.

- Press Enter
- Preview the letters
- Scroll through the letters

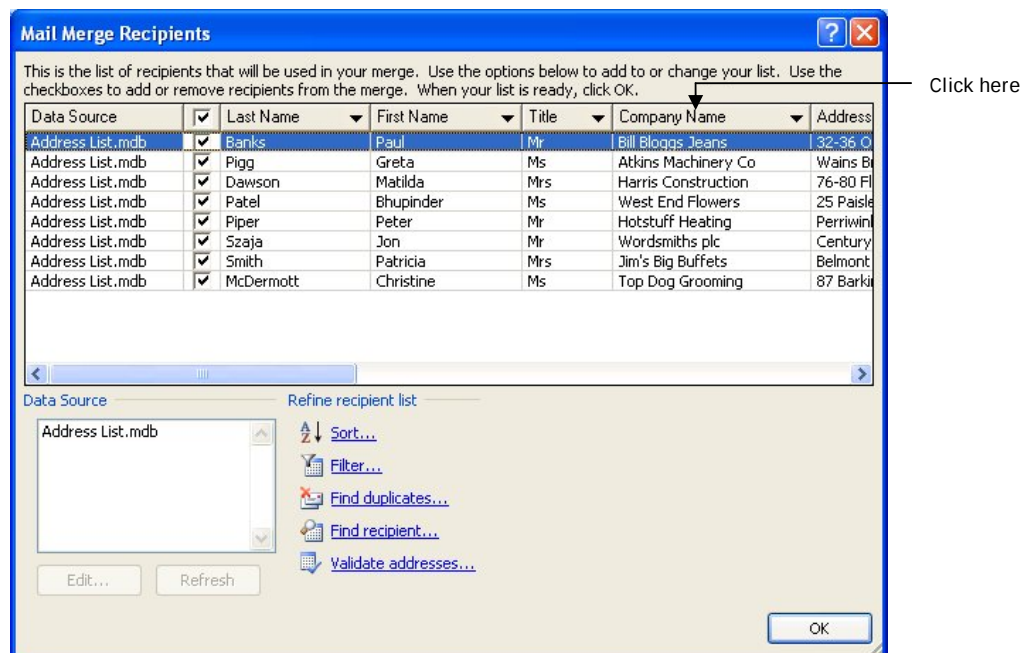
SORTING RECORDS

The records in the data source file are stored in the order in which you create them.

However, if you want to view them in a different order, you can sort them using one or more fields.

Sorting on one field

- Ensure the Mail Merge Recipients dialog box is displayed
- Click the **Company Name** title



The records in the Company field are sorted into alphabetical order.

Sorting on multiple fields

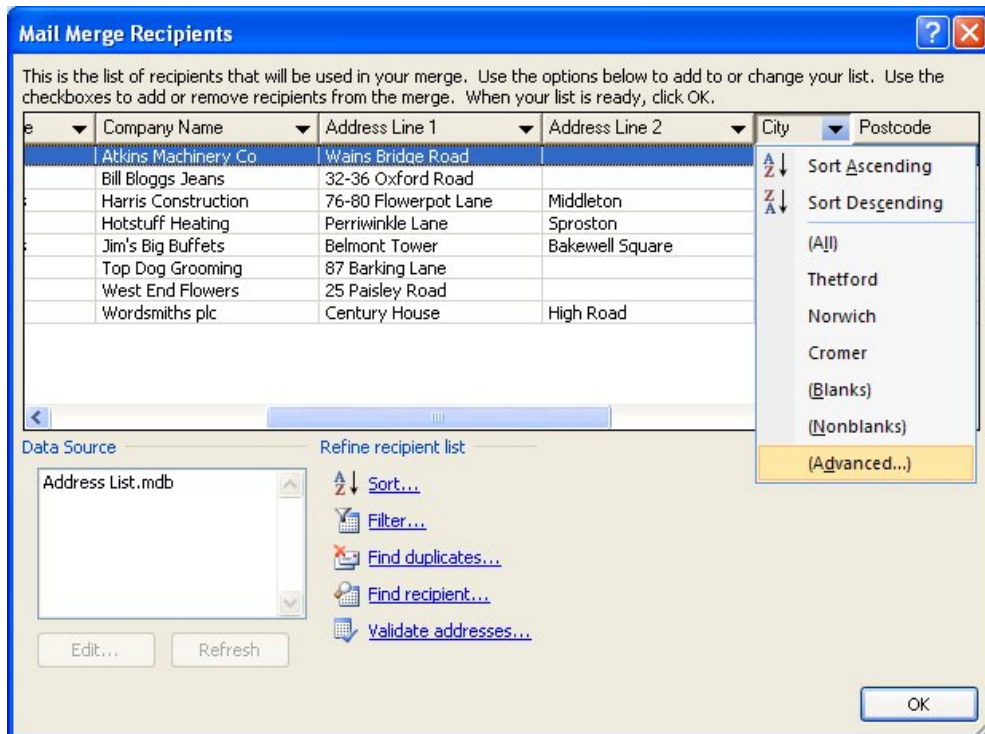
Suppose you want to sort the records by City and then, within that sort, you want to see the Company Names in alphabetical order.

Using a drop menu in the Mail Merge Recipients dialog box is not an option, as this sorts just one field at a time.

Instead, you need to use the **Advanced** feature which gives you the option of sorting on more than one field simultaneously.

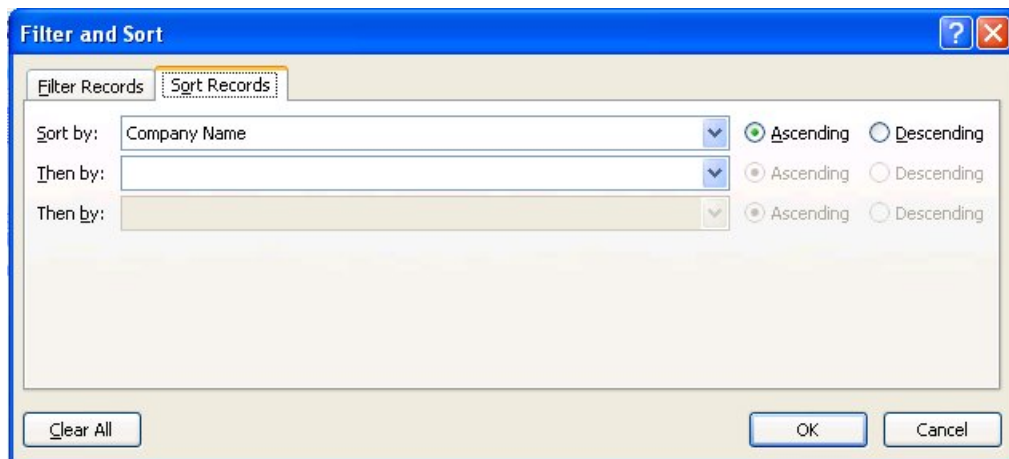
The Mail Merge Recipients dialog box should still be open

- Click on the down arrow next to the **City** column heading
- Select **(Advanced...)**



- Click the **Sort Records** tab to bring it to the top

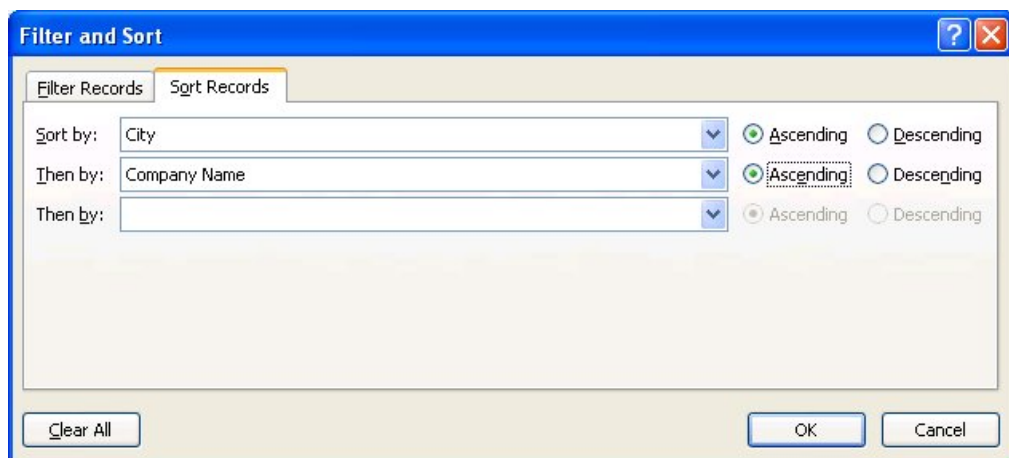
The last sort query that you devised is displayed.



- Click **Clear All**

You are going to sort the data source into City and Company Name order.

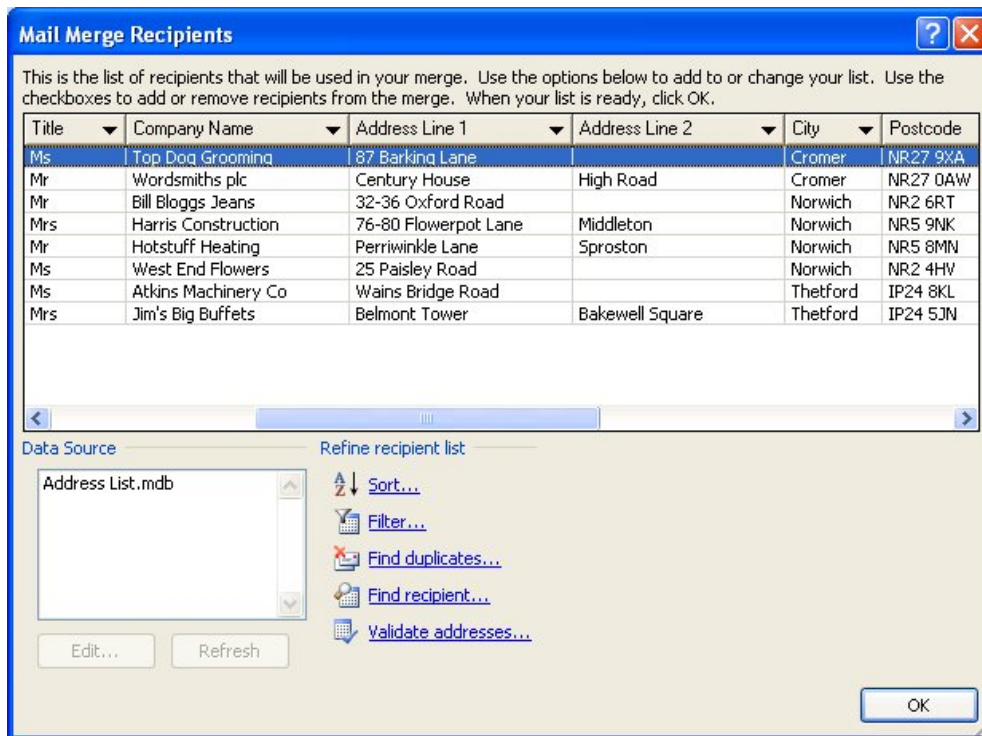
- Click the down arrow in the **Sort by** window
- Select **City**
- Ensure the **Ascending** option is selected
- Click the down arrow in the **Then by** window
- Select **Company Name**
- Ensure the **Ascending** option is selected



- Click **OK**

The records are sorted firstly by City and secondly by Company Name.

- Scroll across so that you can see both fields simultaneously



DELETING A RECORD

The Mail Merge Recipients dialog box should still be open.

- Click **Address List.mdb**
- Click **Edit**
- Find the record for **Ms Greta Pigg**
- Click **Delete Entry**

A warning message is displayed asking whether you want to delete this entry.



- Click **Yes**

The entry is deleted.

- Click **OK**
- Click **Yes**
- Click **OK**
- Save the changes to Confirmation Letter
- Close Confirmation Letter

USING AN EXCEL WORKSHEET AS A DATA SOURCE

You can use an Excel worksheet as a data source.

- Using the Mail Merge Wizard, create the following main document

Adult Education Department
Greenwood Community College
Jane Storer Way
Thurnby
Leicester
LE7 9AB

Date

Dear

ENROLMENT CONFIRMATION

I am writing to confirm your enrolment on the evening classes.

I hope that you will enjoy the course, and look forward to welcoming you to the college.

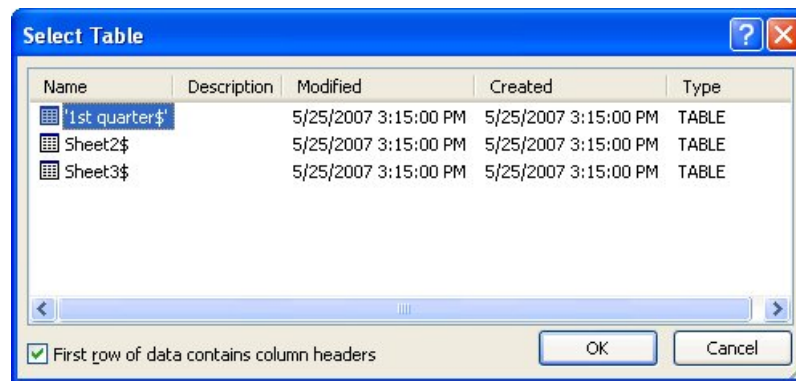
Yours sincerely

Jackie Wilson-Taylor
Adult Education Facilitator

To select the recipients:

- Browse for the file **Evening Class** which is in the WordMailMerge folder on drive C
- Click **Open**

The Select Table dialog box is displayed.



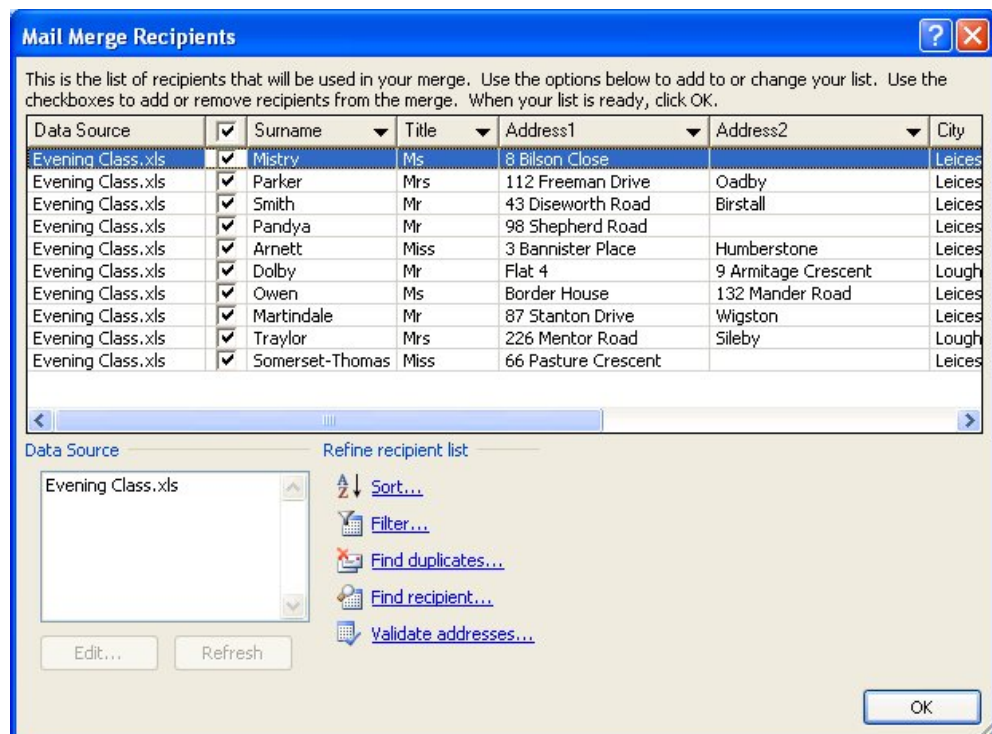
This dialog box shows a list of worksheets within the workbook.

The worksheet **1st quarter** is already selected.

Notice that the checkbox 'First row of data contains column headers' is automatically checked. This means that the wizard will use the first row of data in the worksheet as field names.

➤ Click **OK**

The Mail Merge Recipients dialog box is displayed.



- Scroll across to view all of the fields
- Click **OK**
- Using whichever method you prefer (Address block, More items), insert the name and address fields between the date and 'Dear'
- Ensure that you include the **Initials** field
- Insert the **Title** and **Surname** after 'Dear'
- Insert the **Course Title** field in the first sentence
- Preview the letters
- Complete the merge
- Rather than print the letters now, save the file as **Enrolment Confirmation** in the WordMailMerge folder on drive C
- Close the file
- Close the document without saving

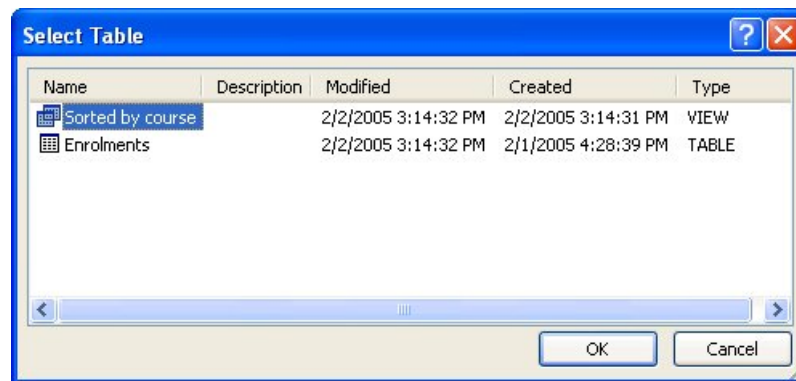
USING AN ACCESS TABLE AS A DATA SOURCE

You can use an Access table or query as a data source.

An Access database containing a table and a query has already been set up for this exercise, and you will use the table to create mailing labels.

- Ensure you have a blank document open
- Run the Mail Merge Wizard and select **Labels**
- Select **Label options**
- Ensure that **Avery A4/A5** is selected
- Choose **L7162** as the label
- Select recipients
- Browse for the file **Evening Course Enrolments** which is in the WordMailMerge folder on drive C

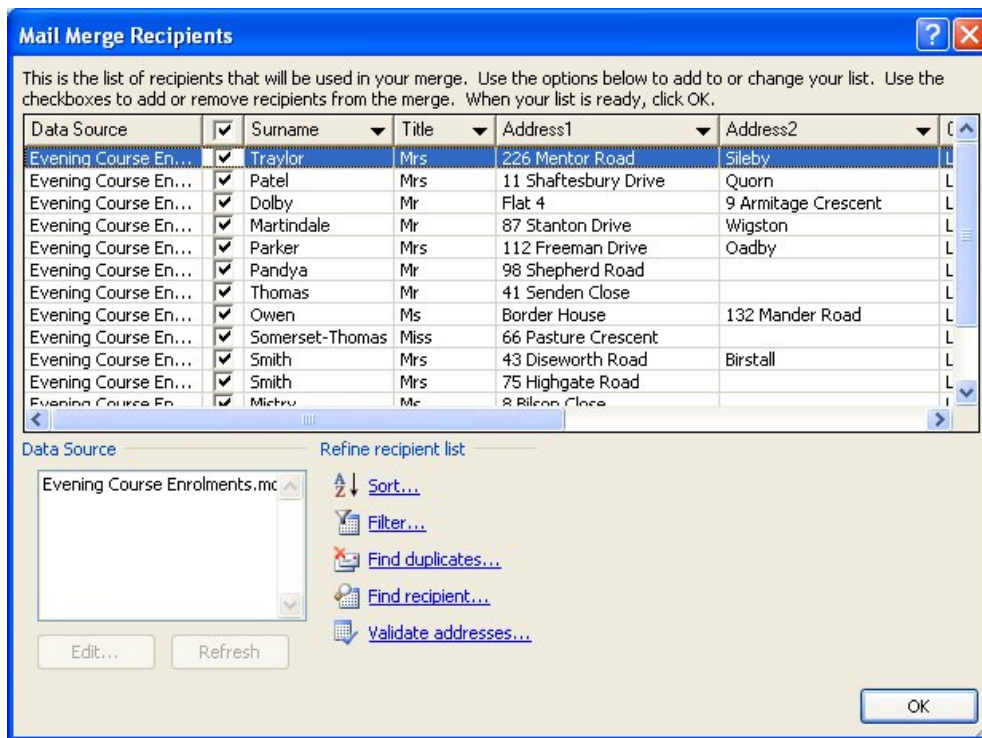
The Select Table dialog box is displayed containing two items: a table and a query (shown as type VIEW).



You are going to use the table.

- Select **Enrolments**
- Click **OK**

The Mail Merge Recipients dialog box is displayed.



- Do not include the following recipients in the mail merge: **Mrs D G Smith** and **Miss L B D Arnett**
- Click **OK**
- Arrange your labels
- Remember to apply the **No Spacing** paragraph style (see page 25)
- Add the recipient information (name and address) using the **Address block** or **More items**
- Ensure that you include the **Initials** field
- Update all labels
- Preview

Miss C Birks 34 Monet Crescent Anstey Leicester LE7 7HB	



The first name on the labels is the one that is currently selected in the Mail Merge Recipients dialog box. You need to complete the merge to see all of the labels.

- Complete the merge

Mrs K G Traylor 226 Mentor Road Sileby Loughborough LE11 6XS	Mrs N K Patel 11 Shaftesbury Drive Quorn Loughborough LE11 8RW
Mr H Dolby Flat 4 9 Armitage Crescent Loughborough LE12 9YJ	Mr M Martindale 87 Stanton Drive Wigston Leicester LE18 2ED
Mrs J Parker 112 Freeman Drive Oadby Leicester LE2 9LX	Mr S F Pandya 98 Shepherd Road Leicester LE3 1JK
Mr D W Thomas 41 Senden Close Leicester LE3 2FG	Ms A O Owen Border House 132 Mander Road Leicester LE3 8JF
Miss P Somerset-Thomas 66 Dacre Crescent	Mrs V Smith 42 Diseworth Road

- Save the file to print later as **Evening Course Labels** in the WordMailMerge folder on drive C
- Close the file
- Close the document without saving