BrainyBetty.Com presents:

Mail merge I: Use mail merge for mass mailings

MICROSOFT® OFFICE WORD 2007 TRAINING

Course contents

- Overview: Mailings en masse
- Lesson 1: How it works
- Lesson 2: Set up your recipient list
- Lesson 3: Perform a complete mail merge

Two of the three lessons include a list of suggested tasks; each includes a set of test questions.

Overview: Mailings en masse

- You need to send to each of your employees a letter or e-mail message containing personal tax withholding and salary information.
- Creating each item individually would take hours. Enter mail merge.
- Using mail merge, you create one document containing the information that's the same in each copy, and add placeholders for the unique information. Word takes care of the rest.

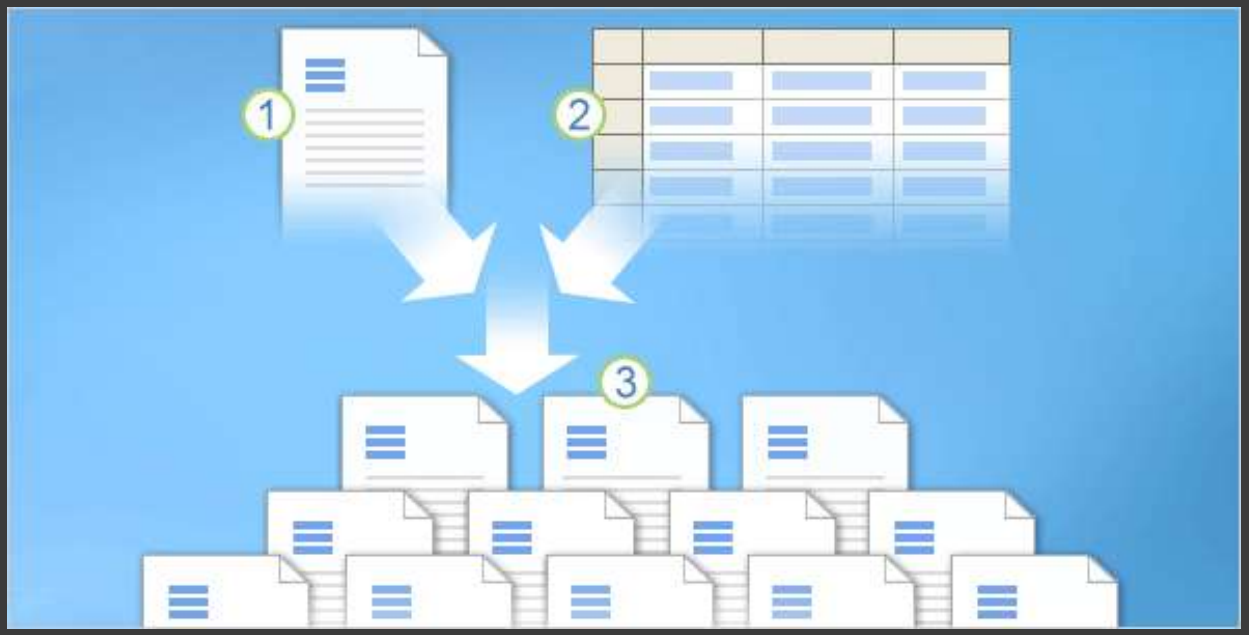
Course goals

- Understand how mail merge works so that you can get the results you want.
- Set up a document for a mass mailing.
- Use the Mail Merge Wizard to perform a basic mail merge.

How it works

LESSON 1

How it works

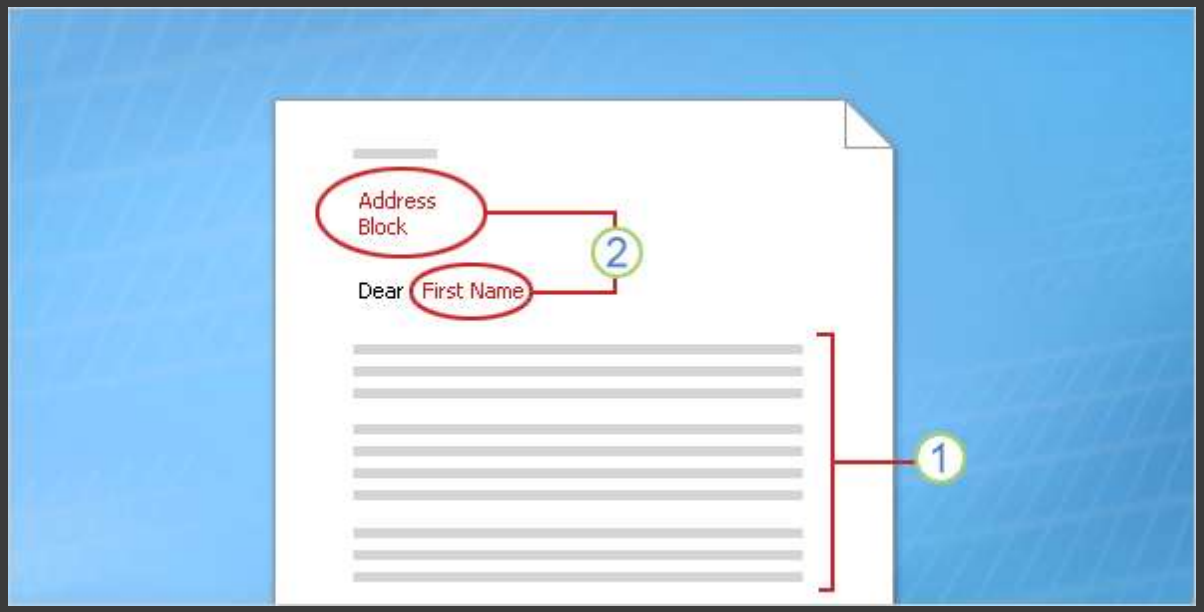


In any mail merge, you'll deal with three different elements.

Understanding these elements will help you get the mail merge results you want and expect.

1. The main document that you start with.
2. Recipient information, such as each person's name and address that you want to merge with the main document.
3. The finished documents, which include the information in the main document plus each recipient's unique information.

Main document

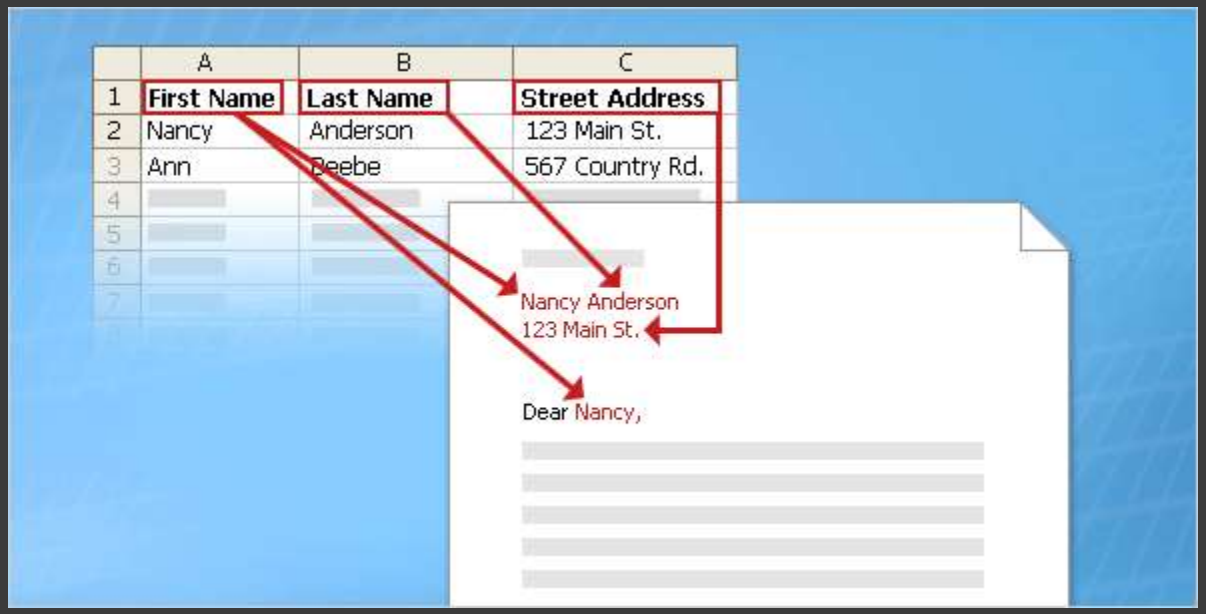


The main document is your starting point. The main document can be a letter, envelope, e-mail, or even a coupon.

It contains the elements shown here.

1. Content that is identical in each copy, such as the main body text of a form letter. You only have to type this text once, regardless of how many letters you intend to print.
2. Placeholders for each recipient's information. For example, in a form letter, the address block and greeting name would be unique in each copy.

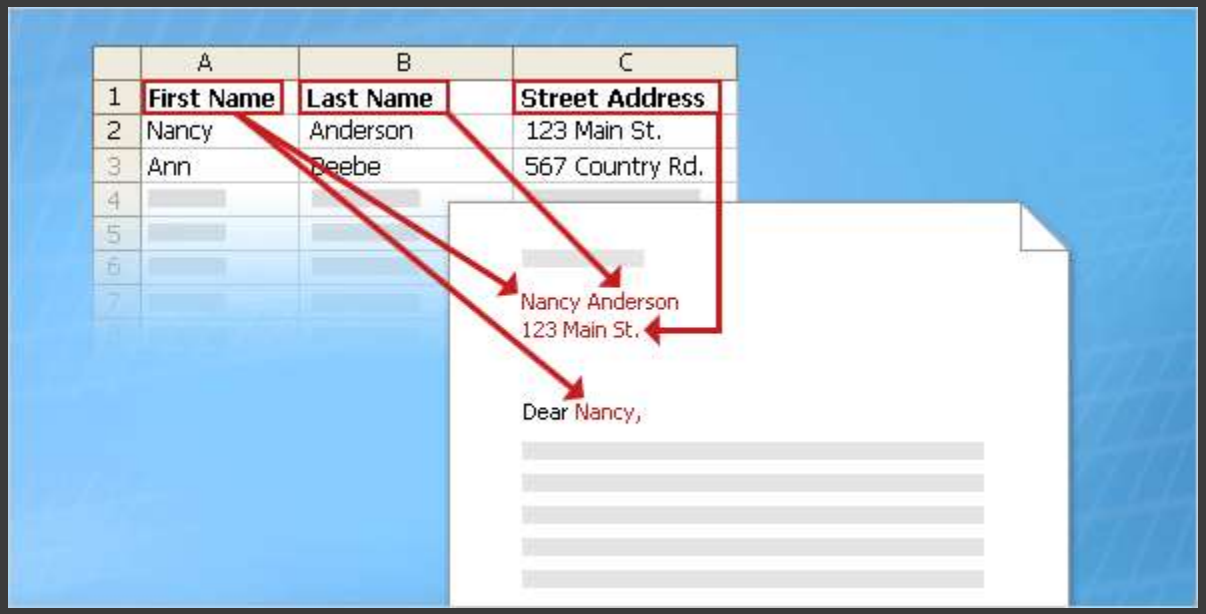
Recipient information



In a mail merge, the recipient's information, which is unique in each merged copy, fills in for the placeholders that you added to the main document.

Recipient information might be: Addresses on envelopes or labels; names in the greeting line of a form letter; salary amounts in e-mail messages that you send to your employees; personal notes about favorite products in postcards that you mail to your best customers; or numbers on redeemable coupons.

Recipient information

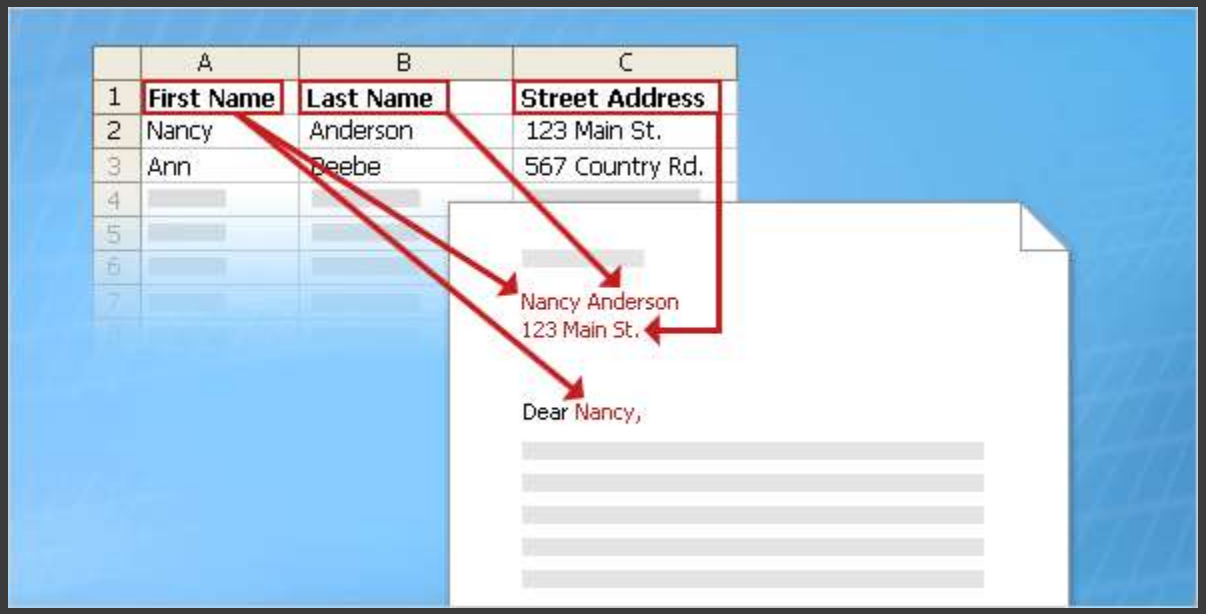


Recipient information must be kept in a **data source**.

"Data source" is an umbrella term that covers a whole category of files you work with all the time.

For example, your Microsoft Office Outlook® contacts list is a data source.

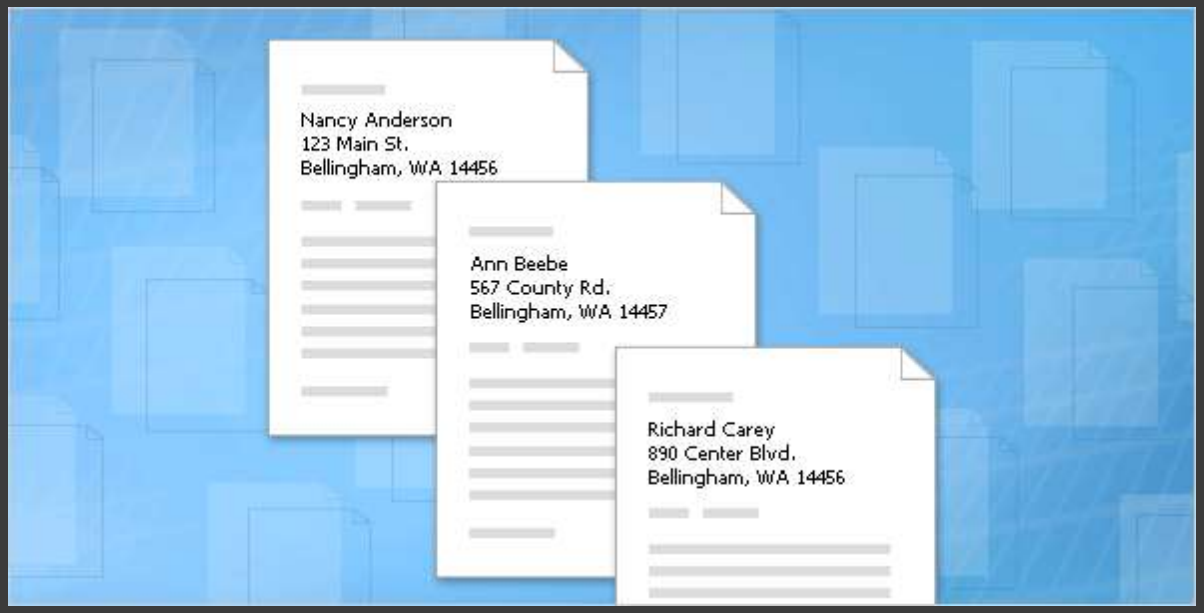
Recipient information



The recipient information is usually listed in columns and rows, as shown in the table in the picture.

The data source file must be structured in a way that makes it possible to link specific information with the placeholders in the main document.

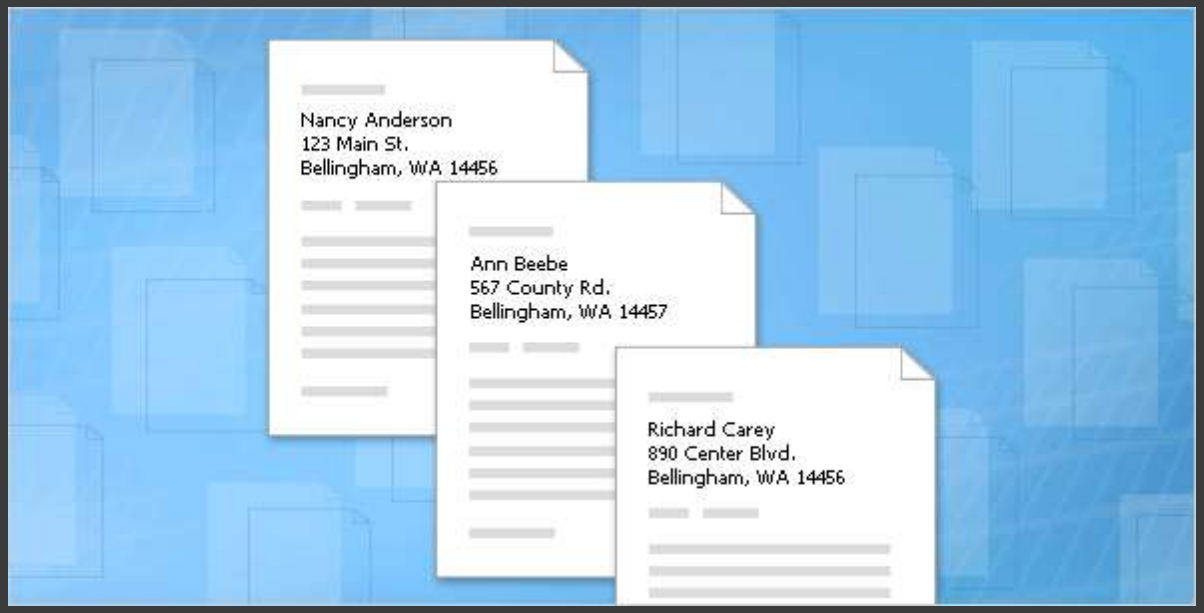
Finished set of documents



When you finish a mail merge, you get what's pictured here.

- The set of individual finished documents, which you can print (for example, letters, labels, envelopes, or coupons) or which you can transmit electronically during the merge process (for example, e-mail messages).

Finished set of documents



When you finish a mail merge, you get what's pictured here.

- The main document. This is the document you used as a starting point, which remains a separate document. It is not automatically saved after the merge.

Test 1, question 1

In a mail merge, what is the main document? (Pick one answer.)

1. The document you start with that contains both text that is identical for each merged letter, envelope, and so on, and placeholders for the unique recipient information.

2. The first document in the set of finished merged documents.

3. A document that contains only the text that is identical in each merged copy.

Test 1, question 1: Answer

The document you start with that contains both text that is identical for each merged letter, envelope, and so on, and placeholders for the unique recipient information.

The main document is your starting document, where you add all the text that will be the same in every copy as well as placeholders that indicate what the unique recipient information will be and where it will appear.

Test 1, question 2

- **The main document with the text and placeholders is automatically saved after the merge is complete. (Pick one answer.)**

1. True.
2. False.

Test 1, question 2: Answer

- False.

You should save the main document, so that you can use it again to complete a new merge.

Test 1, question 3

- **Why does the unique recipient information you use in a mail merge have to be stored in a data source file? (Pick one answer.)**

1. Data source files are a special type of file that only works with mail merge.

2. Data source files organize information in a way that lets you match specific pieces of that information with specific placeholders in the main document.

3. Data source files are designed to hold a lot of information.

Test 1, question 3: Answer

Data source files organize information in a way that lets you match specific pieces of that information with specific placeholders in the main document.

It’s the structured way that information is organized in the files that makes it possible for you to put information from one cell in that file into one unique document.

Set up your recipient list

LESSON 2

Set up your recipient list

You know what the basic elements of a mail merge are.

Now you'll learn how to set up your main document and connect it to the recipient list.

The recipient list, along with the placeholders that you add to your Word document or envelope, is the heart and soul of mail merge.

They work together to get unique information into the final individually merged copies.

More about the recipient list

A recipient list can be any file that organizes recipient information into columns and rows. You can create it using lots of different programs, such as Excel, Access, or Outlook.

1. The columns in a list represent a category or type of information. Each column is identified by a column heading. For example, in a customer list you might have columns for Name, Last Name, and Street Address.

More about the recipient list

A recipient list can be any file that organizes recipient information into columns and rows. You can create it using lots of different programs, such as Excel, Access, or Outlook.

2 Each row in a list represents one recipient's complete information. In the customer list, for example, one row contains all the information about one customer: the customer's name, address, and so on.

More about the recipient list

It's these columns and rows that make it possible to get unique recipient information into documents during a mail merge.

From the main document, you connect to the list and then you can add any column heading as a placeholder into the main document. (Officially, these placeholders are called fields. More on fields in a moment.)

More about the recipient list

It's these columns and rows that make it possible to get unique recipient information into documents during a mail merge.

When the mail merge is complete, there will be a finished document for each person that contains information from the entries in one row of the recipient list.

Where the recipient list comes from

In many cases, the recipient list that you want to use will already exist.

For example, you might have access to a file with a list of the following.

- Customer or contact names, addresses, and more.
- The products or services your company offers.
- Information about your employees.

Where the recipient list comes from

If the list exists, you can just connect it during the mail merge.

But don’t worry if you don’t have a list yet. The mail merge process includes a step where you can create a recipient list from scratch. More on this in the next lesson.

Fields

After you connect to the recipient list, you can specify the information that you want to include in the mail merge by using **fields**.

A field is a set of codes that instructs Word to insert information into a document automatically.

Informally, you can think of fields as placeholders.

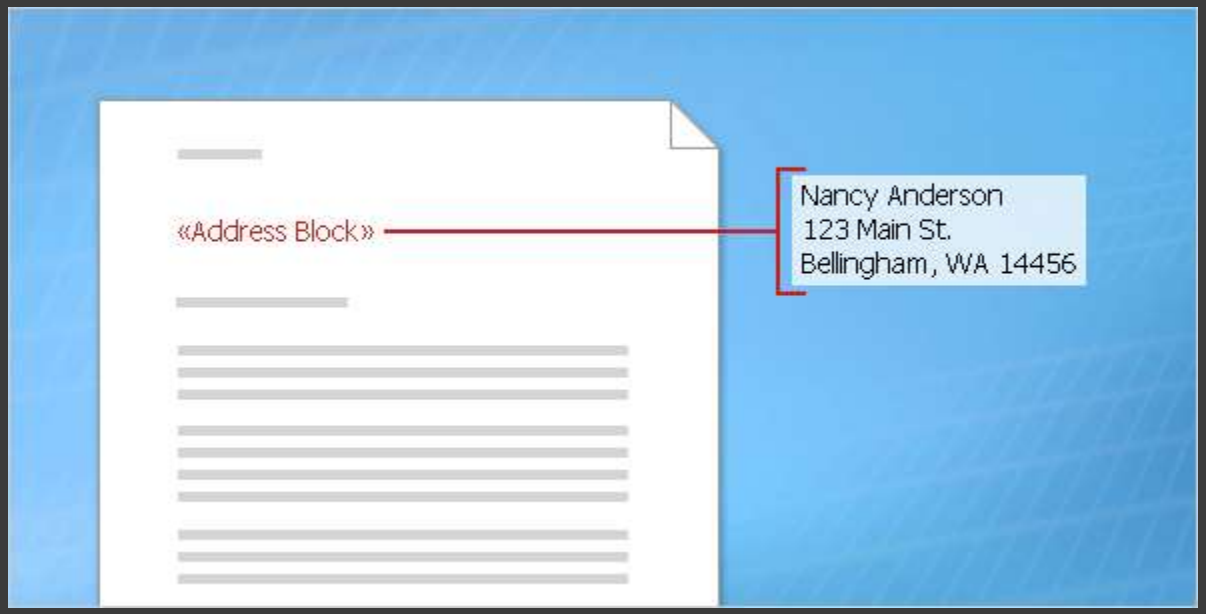
Fields

In a mass mailing, the fields you use are called **merge fields**, and they are the placeholders for the unique information that comes directly from a recipient list.

For example, in the illustration, merge fields have been added for information stored in the Address and Name columns of a recipient list.

Notice that they're surrounded by chevrons (**« »**) in a document.

Merge fields

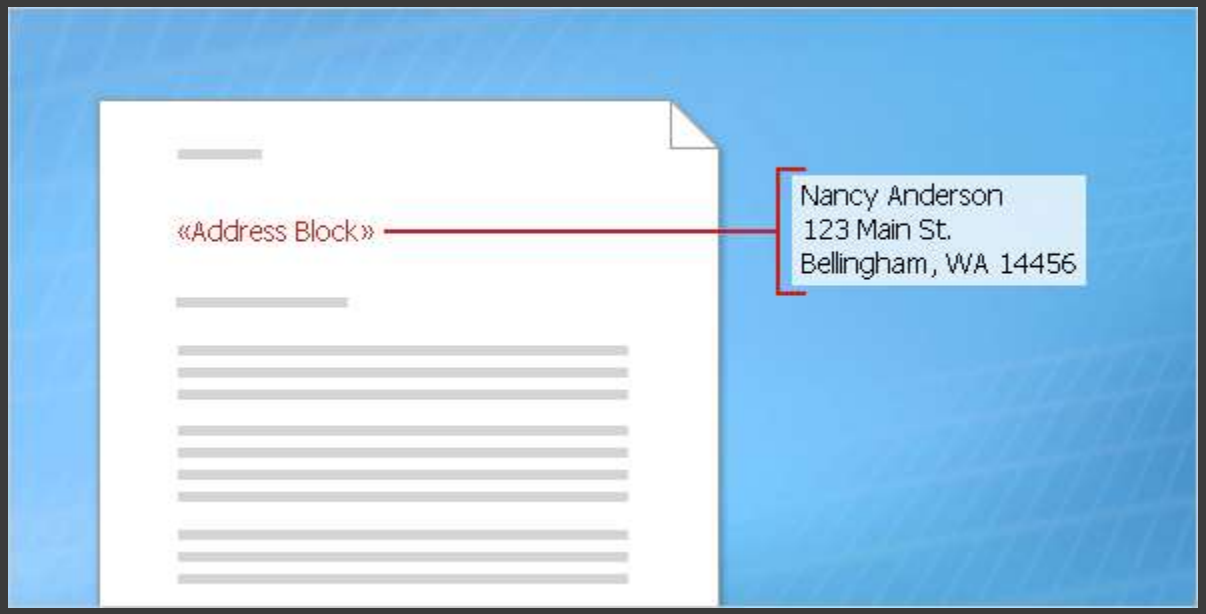


You can create a merge field by combining other fields, or group fields and then use spaces, line breaks, and punctuation marks as you would normally in a sentence.

For example, you might want to create a courtesy title before the surname or full name and set up fields in your document like this:

«Title» «Last Name»
«Street Address»
«City», «State» «Postal Code»

Merge fields



You can also control how recipient information looks in the merged documents by formatting the fields.

For example, you might want names to be bold or colored red.

In the main document, select the field, including the surrounding chevrons (« »). On the **Home** tab, click any command in the **Font** group or the **Paragraph** group, and choose the formatting options you want.

Suggestions for practice

- Divide the data in the Name column into two columns.
- Create a Personal Note column.
- Save the Excel worksheet.

Online practice (requires Excel 2007)

Test 2, question 1

- **What is the relationship between your recipient list and the fields you insert into the main document? (Pick one answer.)**

1. There is no relationship.
2. Fields are equivalent to the columns in the recipient list.
3. Each field represents one cell in the recipient list.

Test 2, question 1: Answer

- Fields are equivalent to the columns in the recipient list.

Adding a field to the main document means that information stored in the corresponding column in your list will appear in the merged documents.

Test 2, question 2

- **How can you distinguish a field from other text in a main document? (Pick one answer.)**

1. Fields are always formatted as bold text.
2. Fields are italicized.
3. Fields are surrounded by chevrons (**« »**).

Test 2, question 2: Answer

- Fields are surrounded by chevrons (« »).

Test 2, question 3

- **You must have an existing recipient list in order to perform a mail merge. (Pick one answer.)**

1. True.
2. False.

Test 2, question 3: Answer

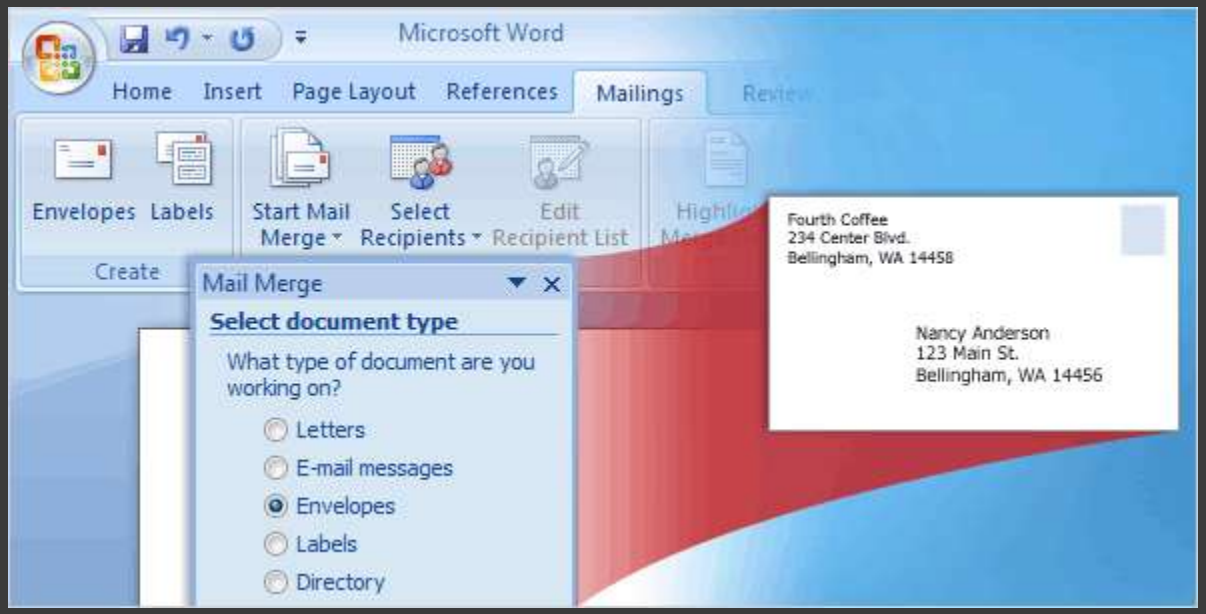
- False.

You can create this list as part of the mail merge process. If you have only a few people for the mail merge, it may be easiest to type the list during the process.

Perform a complete mail merge

LESSON 3

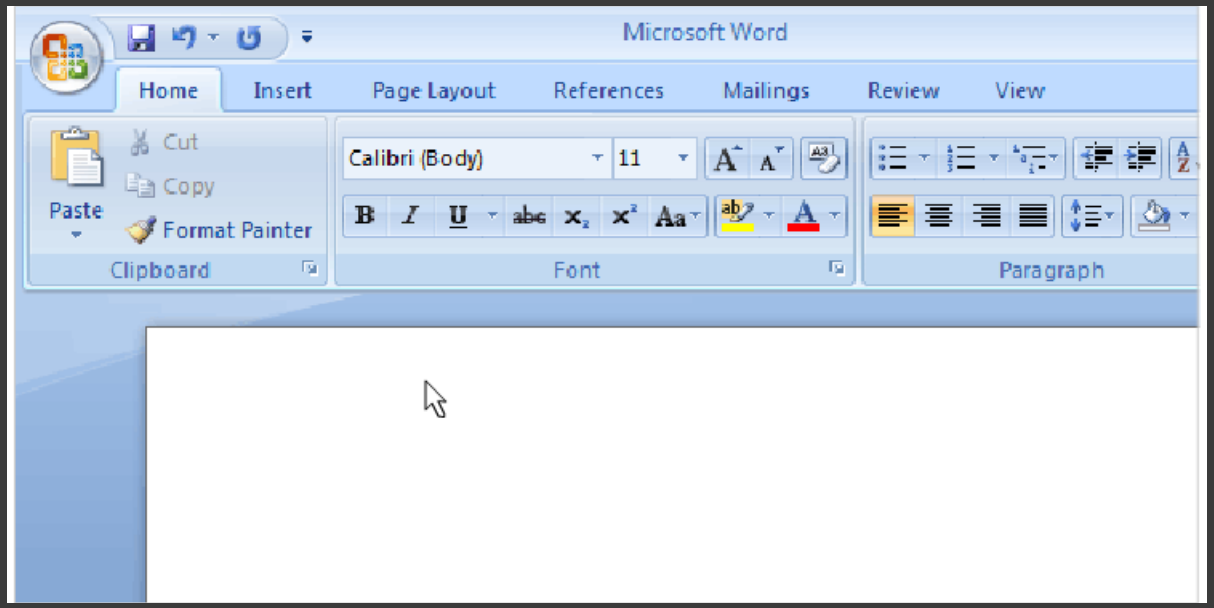
Perform a complete mail merge



Now you'll walk through the process of performing a mail merge by using the Mail Merge Wizard.

At the end of this lesson you will learn about another way to perform a mail merge.

Open the Mail Merge Wizard

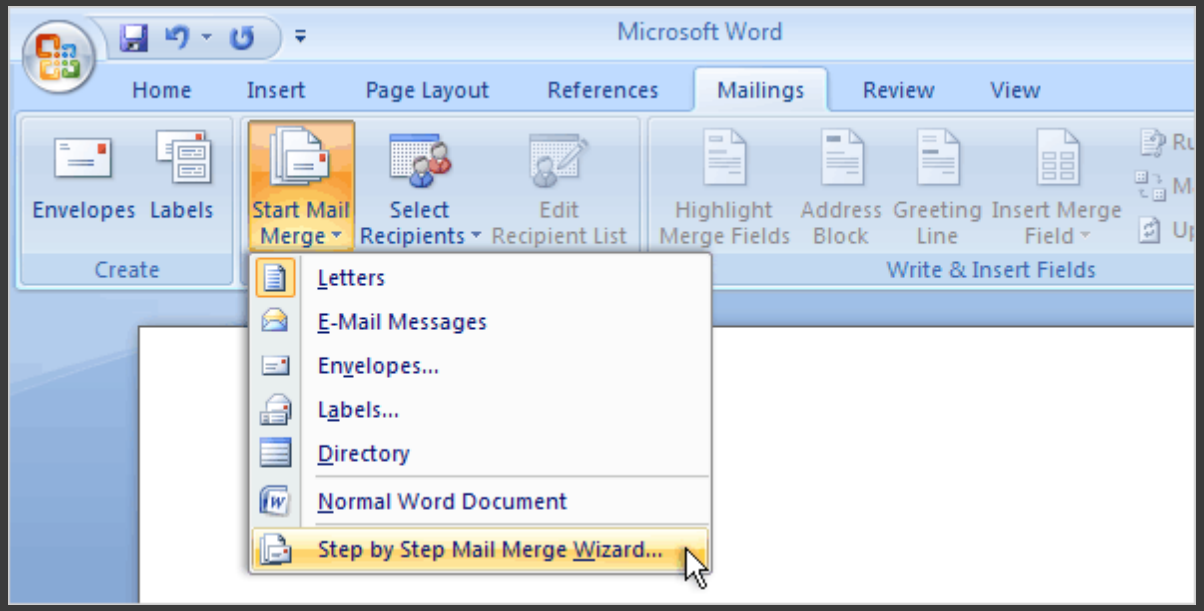


To perform a mail merge, click **Start Mail Merge** on the **Mailings** tab, and then click **Step by Step Mail Merge Wizard**.

Animation: Right-click, and click **Play**.

The wizard opens on the right of the window in a task pane. Follow the prompts and click **Next** at the bottom of the pane to step through the wizard (or **Previous** if you need to go back to an earlier step).

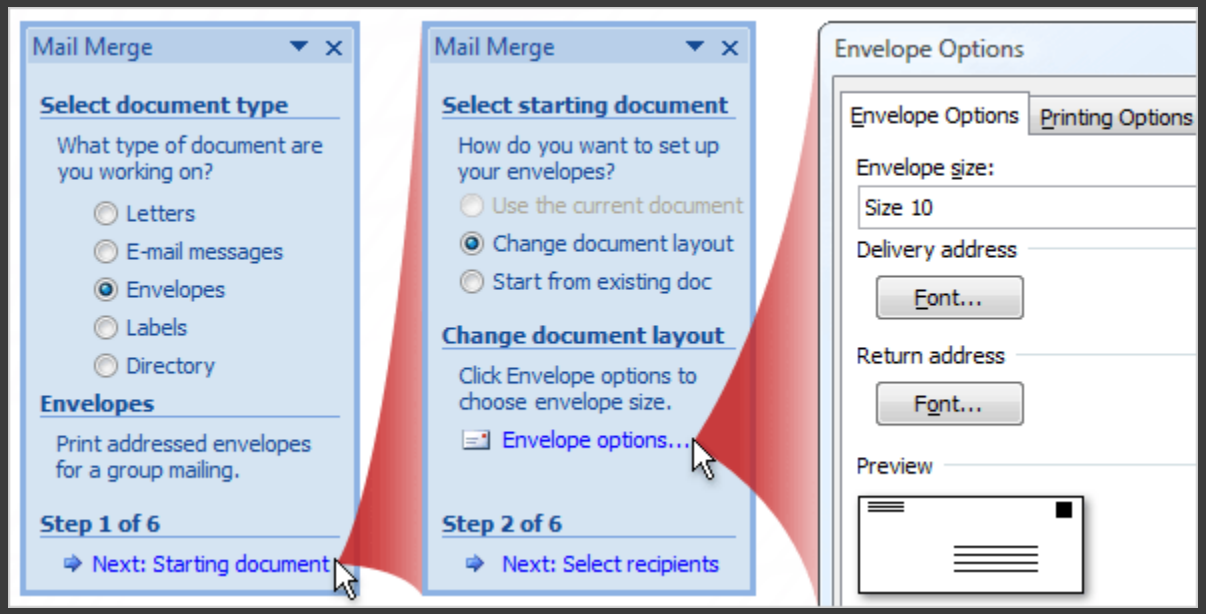
Open the Mail Merge Wizard



To perform a mail merge, click **Start Mail Merge** on the **Mailings** tab, and then click **Step by Step Mail Merge Wizard**, as shown here.

The wizard opens on the right of the window in a task pane. Follow the prompts and click **Next** at the bottom of the pane to step through the wizard (or **Previous** if you need to go back to an earlier step).

Set up the main document

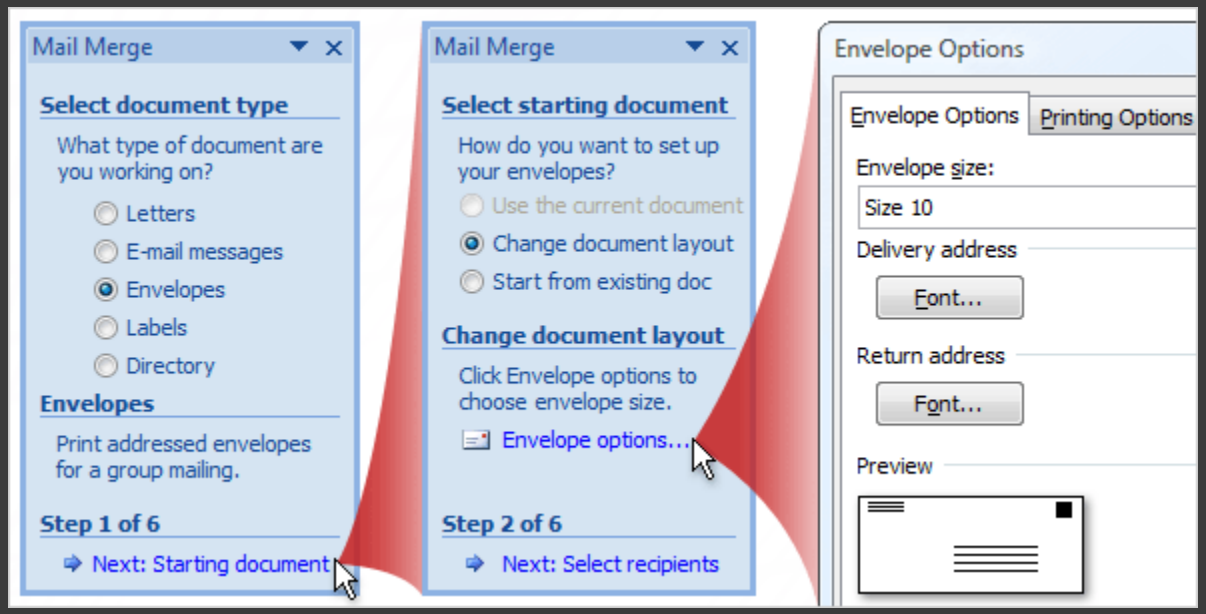


The second step in the wizard is to set up the starting document.

You may be sending a direct mail letter, or an e-mail message, or perhaps you want to start with envelopes and labels.

Or you may want to create a directory to store listings of data, such as customer names and addresses, product information, and personnel contact data.

Set up the main document

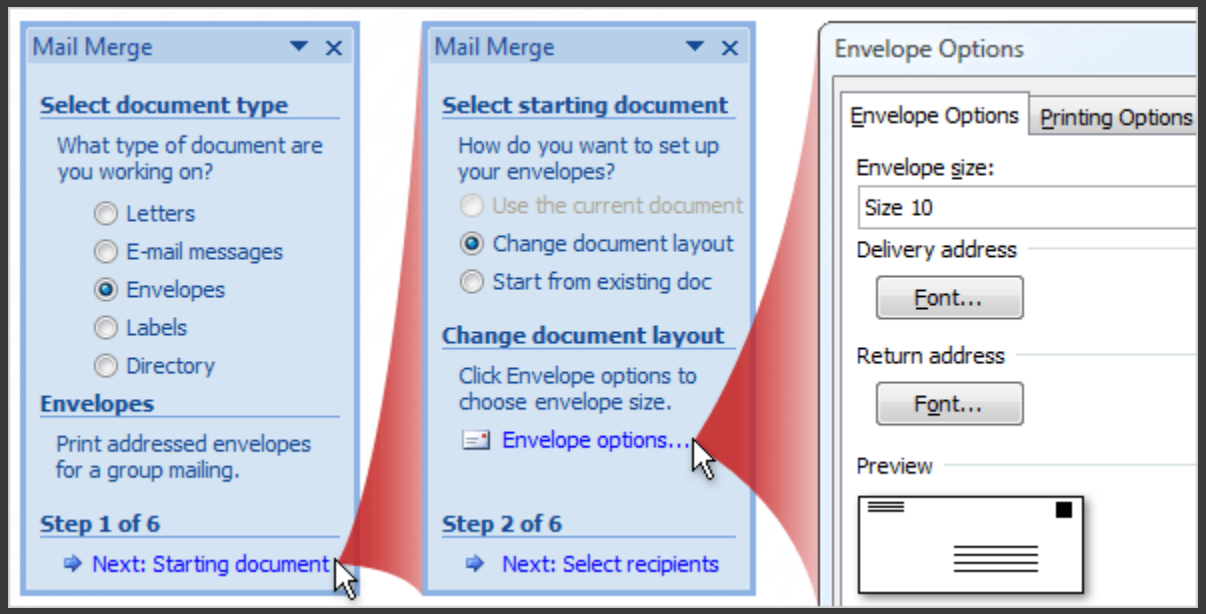


The options in the wizard vary according to the type of document selected in the first step.

You selected envelopes, which has these options.

Change document layout. This option is selected because a blank document was open when you started the wizard. You want to change the open blank document to an envelope document. Click **Envelope options** and choose the envelope size and other options you want, and then the envelope document replaces the blank document.

Set up the main document

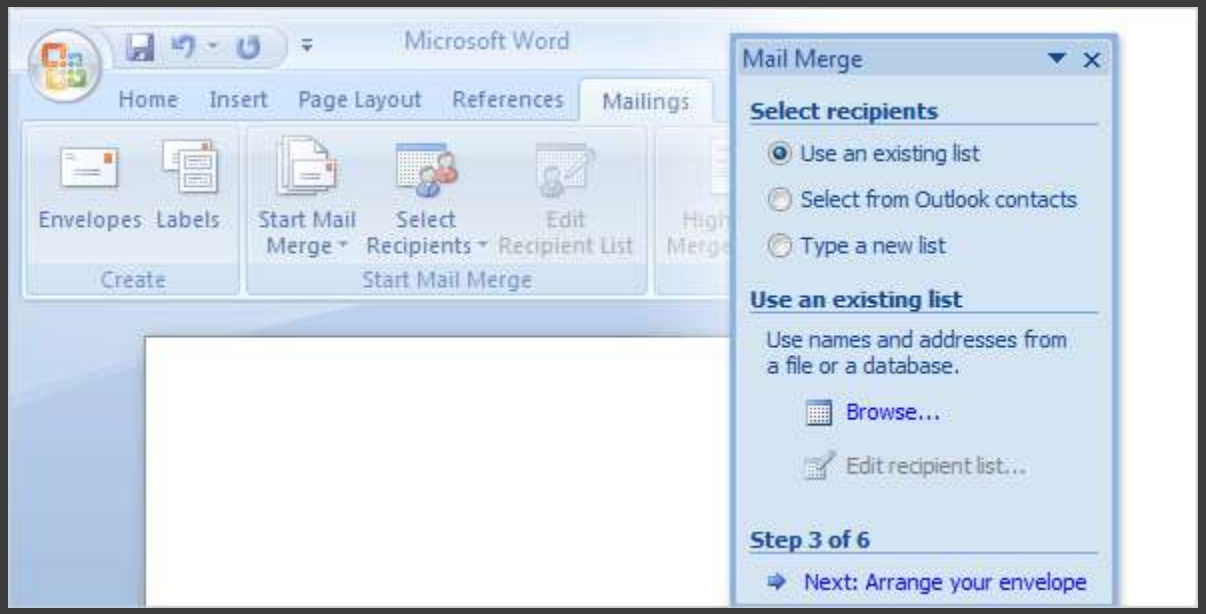


The options in the wizard vary according to the type of document selected in the first step.

You selected envelopes, which has these options.

Start from existing document. If you have a previously saved envelope that you want to use for the mail merge, but your screen currently has a blank document open, select this option to replace the blank document with your envelope.

Connect to the recipient list



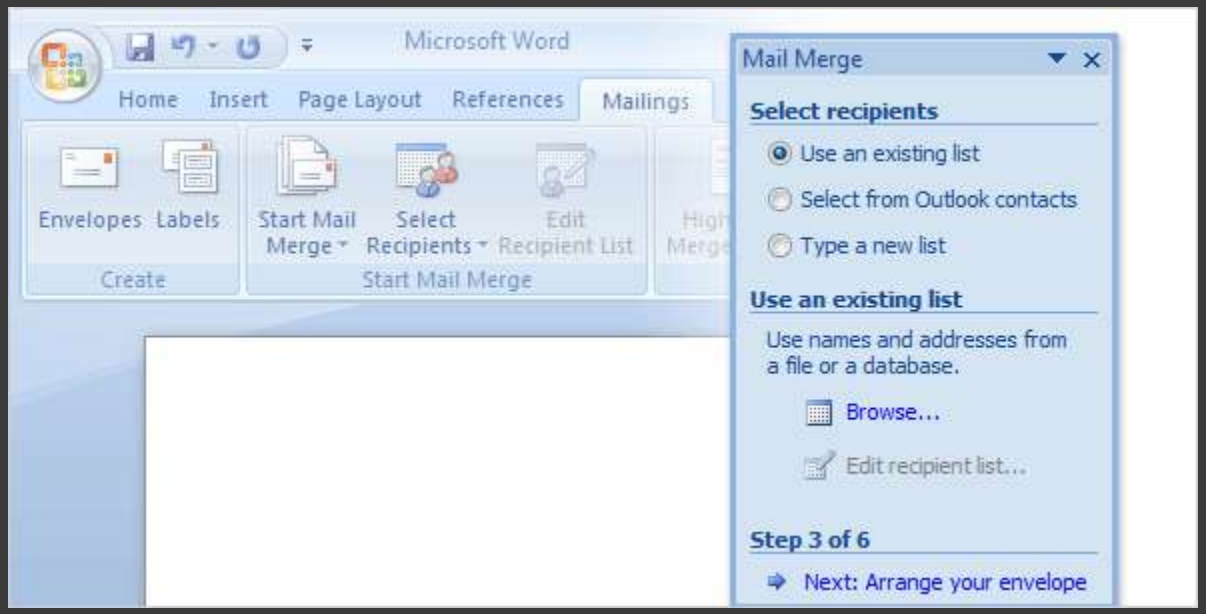
In Step 3, you connect to the recipient list that you want to merge into your documents.

You have three options.

Use an existing list. If you already have a recipient list that contains the information you want to merge, select this option.

Then, click **Browse** in the wizard to locate and open that file.

Connect to the recipient list



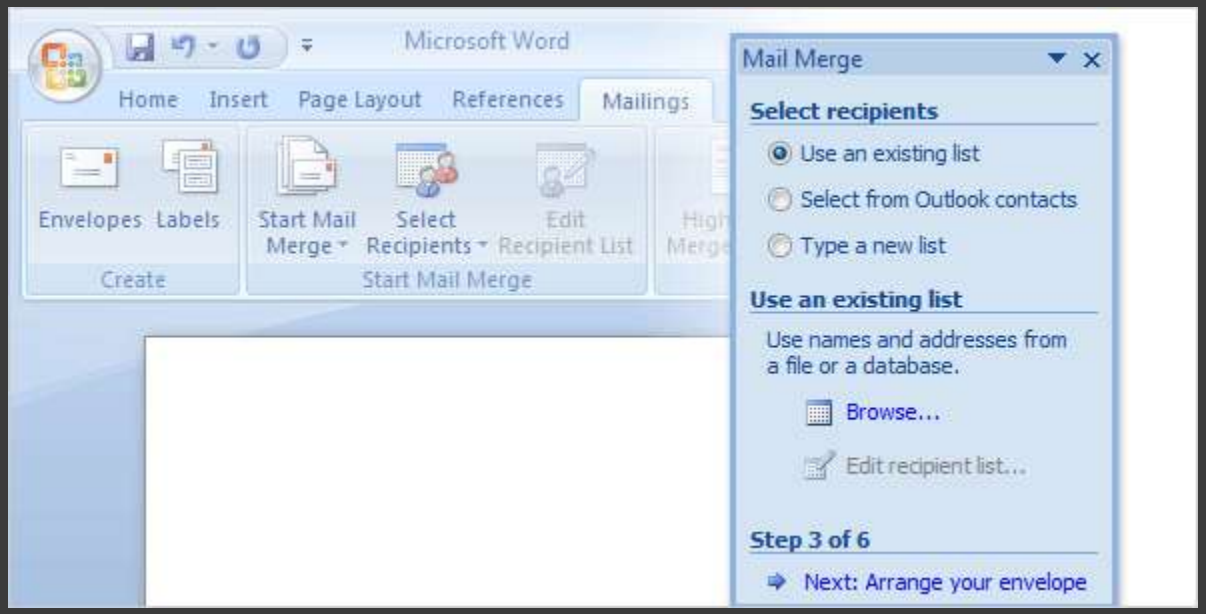
In Step 3, you connect to the recipient list that you want to merge into your documents.

You have three options.

Select from Outlook contacts. If you want to use your Outlook contacts list as your recipient list, select this option.

Then, click **Choose Contacts Folder** to locate and open the correct contacts list.

Connect to the recipient list



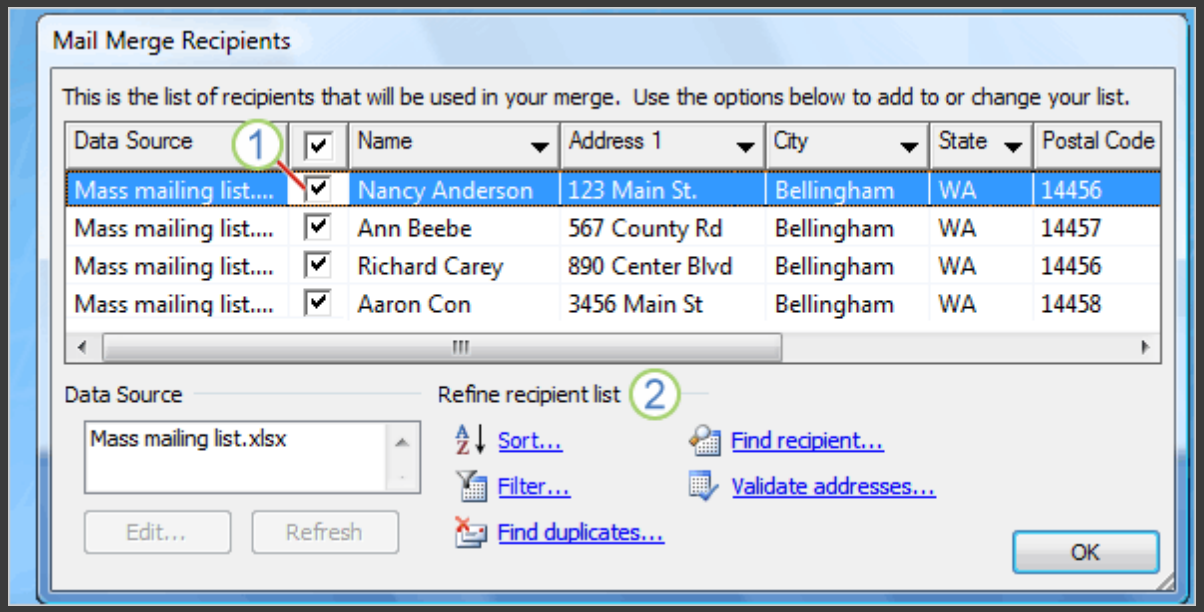
In Step 3, you connect to the recipient list that you want to merge into your documents.

You have three options.

Type a new list. If you don't have an appropriate recipient list and want to create one, select this option. The new list is saved as a mailing database (.mdb) file in the **My Data Sources** folder, which is located in your Documents or My Documents folder.

You can reuse the file for future mail merges.

Choose the recipients for your mailing

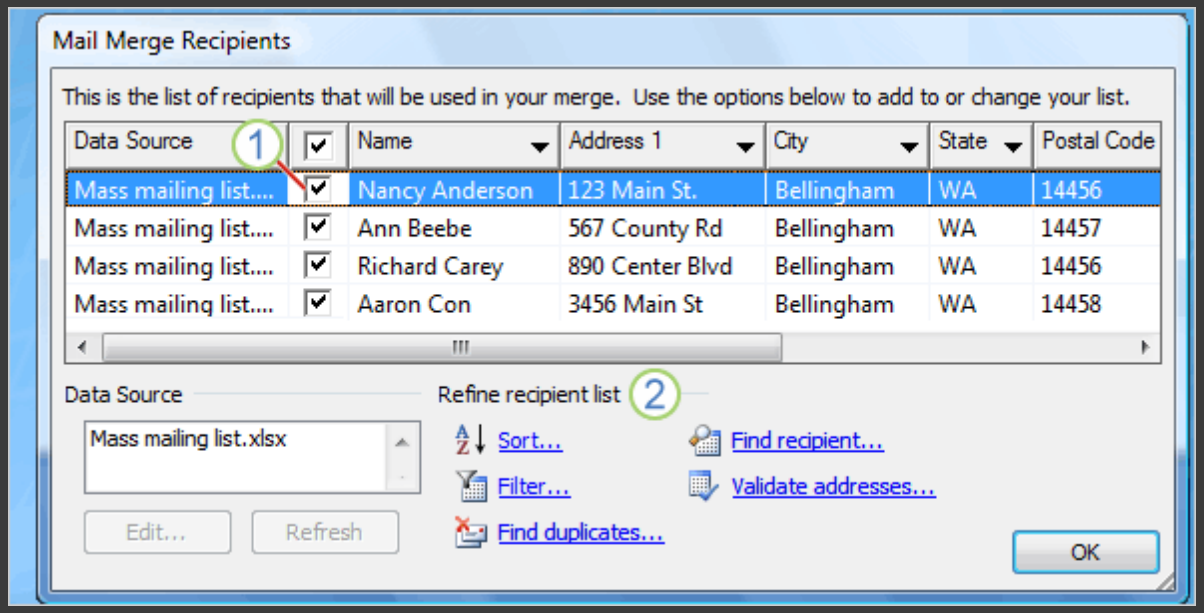


After you connect to the recipient list, you choose the recipients that you want to include in your mailing.

For example, you might want to send a form letter to only those customers in your file with a specific postal code.

Or, you might want to create a directory that includes only one product line.

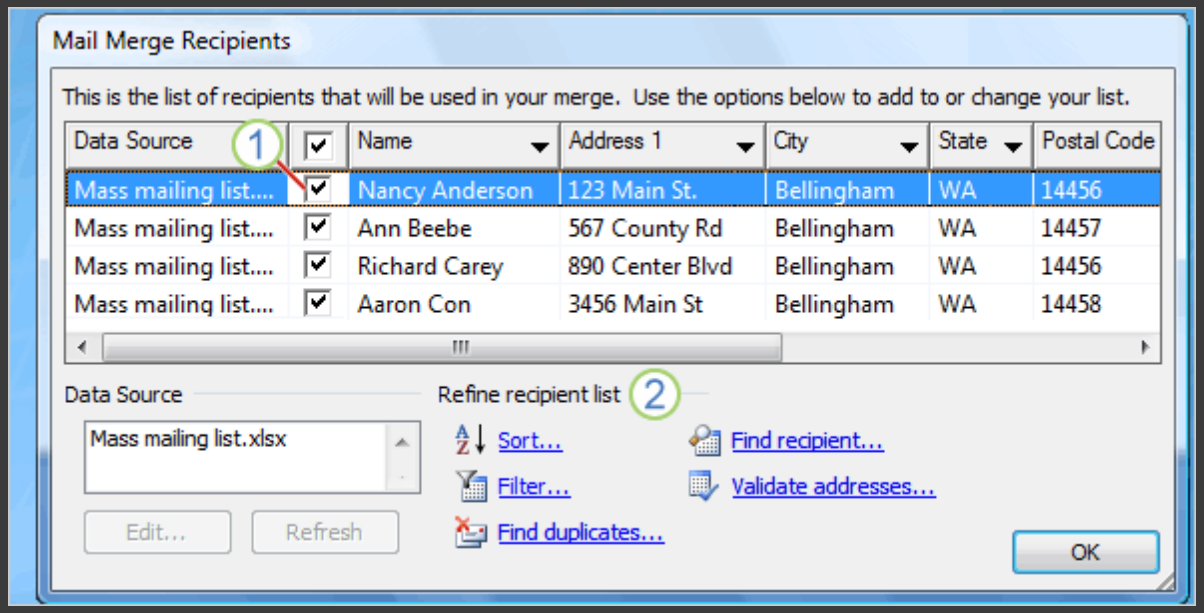
Choose the recipients for your mailing



You do all this in the **Mail Merge Recipients** dialog box, which opens automatically after you connect to or create a recipient list.

1. All the recipients have a check mark next to their name and are included in the mailing by default.

Choose the recipients for your mailing



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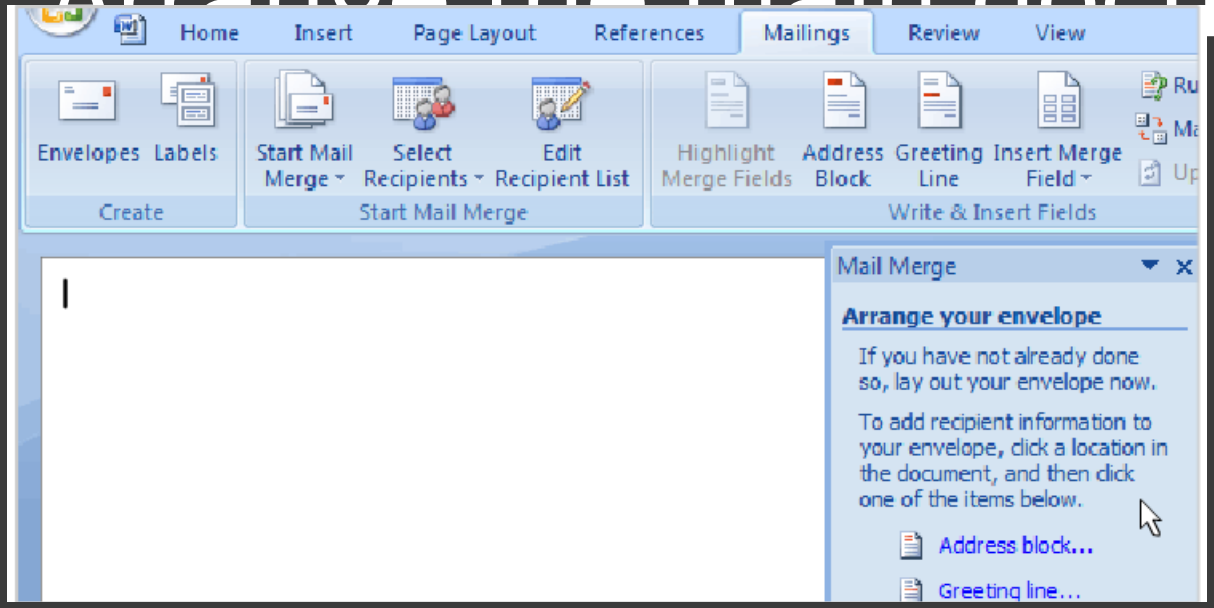
2. Refine the recipient list by clicking **Sort…** to choose the column name that you want to view and arrange (either ascending or descending); or clicking **Filter…** to enter the fields and values of the recipients that you want to view.

Arrange the main document



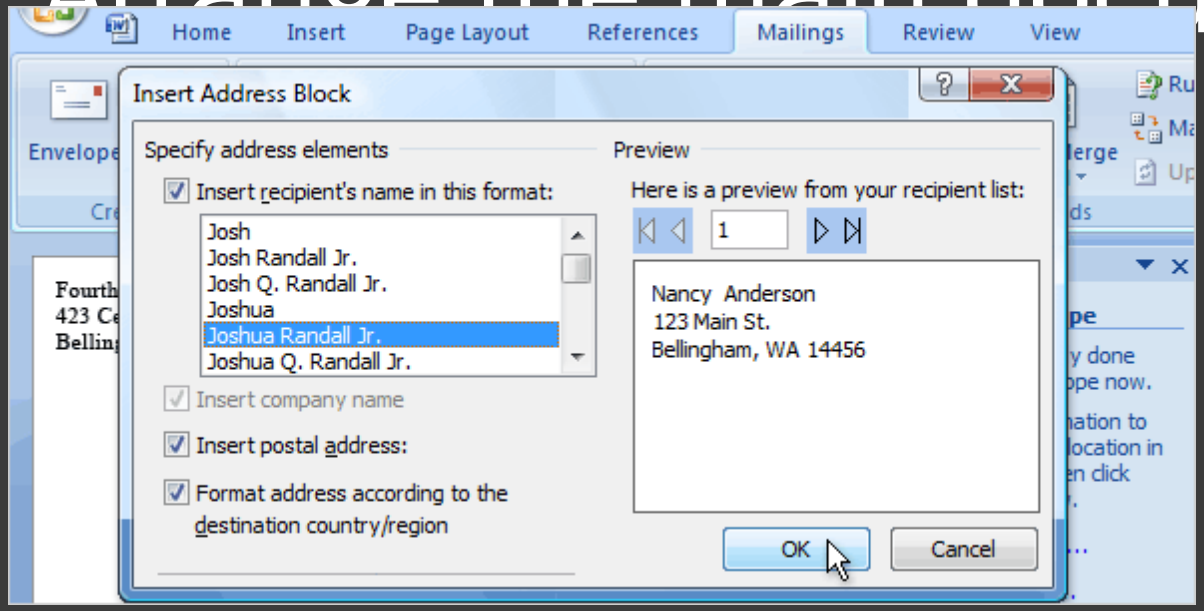
Next, you **arrange** the main document, which means putting content into it.

Animation: Right-click, and click **Play**.

That content consists of information that stays the same in each merged copy, and placeholders (fields) for the recipient information in each merged copy.

The animation shows how to arrange an envelope.

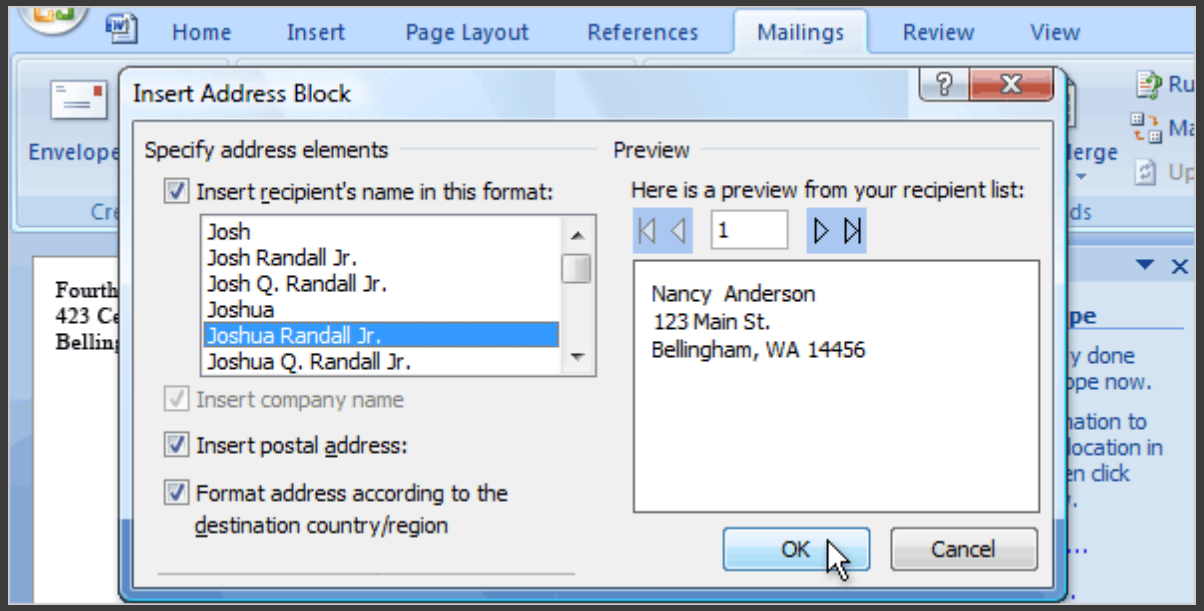
Arrange the main document



Next, you **arrange** the main document, which means putting content into it: the information that stays the same in each merged copy, and placeholders for the recipient data in each merged copy.

For an envelope, the information that stays the same in each merged copy is the return address that you type in the upper left corner. The placeholders are the addresses of each recipient.

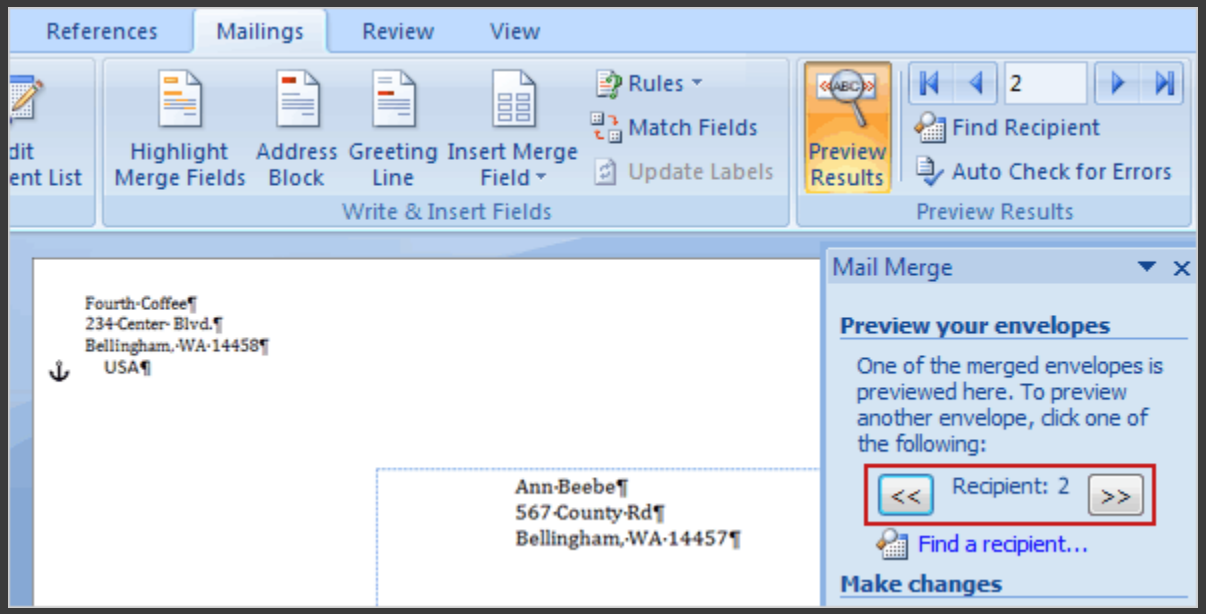
Arrange the main document



The quickest way to add a delivery address is to click **Address block** in the wizard.

It adds a pre-designed «AddressBlock» field to the envelope, which includes First Name, Last Name, Street Address, City, State, and Postal Code.

Preview



After you've added all the content and fields to the main document, you're ready to preview how the merged documents will look.

When you click **Next** at the bottom of the wizard to move to the next step, the first merged document automatically appears.

Preview

Depending on how the first document looks, you have several choices:

- If things don’t look right, click **Previous** at the bottom of the wizard. By returning to the previous step, you can add, delete, or match fields, or make other corrections so that the information is displayed correctly.
- If things look good, click the double right arrow button

at the top of the wizard to page through a few more of the merged documents, as shown in the picture.

Preview

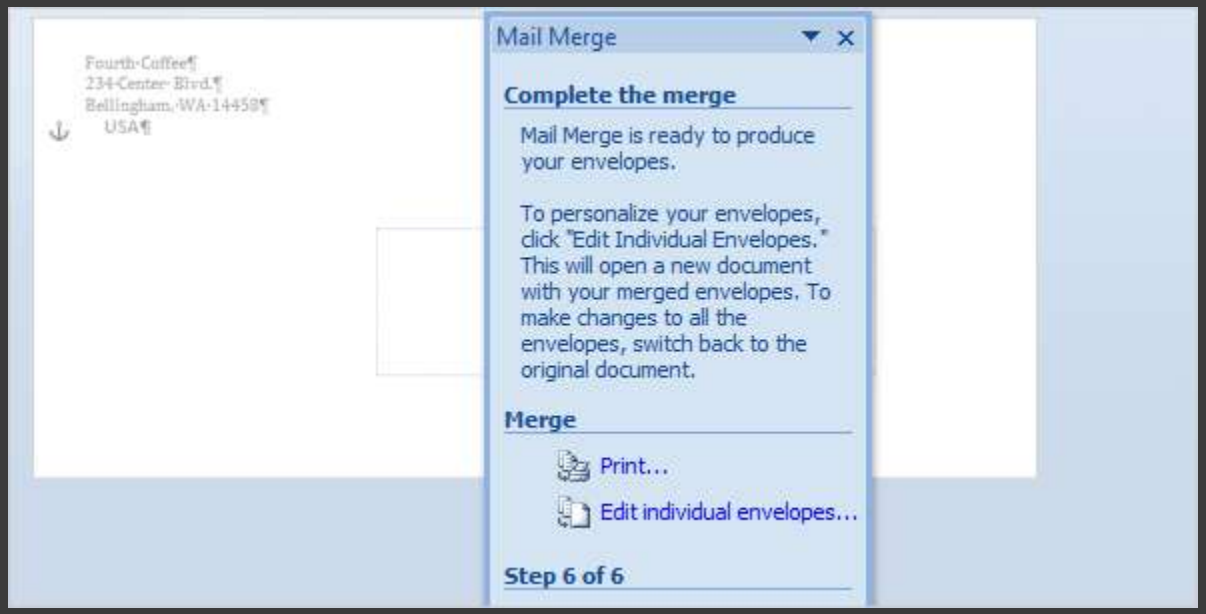
Depending on how the first document looks, you have several choices:

- If you want to view the merged document for a particular recipient, click **Find a recipient** to search for that person. As you page through the documents, you can exclude any person from the merge by clicking **Exclude this recipient**.

  Note that you're excluding a recipient only from the final merge results, not deleting anything from the recipient list.

- If you realize that the merge includes some recipients you don't actually want to include, click **Edit recipient list** to open the **Mail Merge Recipients** dialog box. As described previously, you can use this dialog box to narrow down the recipient list.

Complete the merge



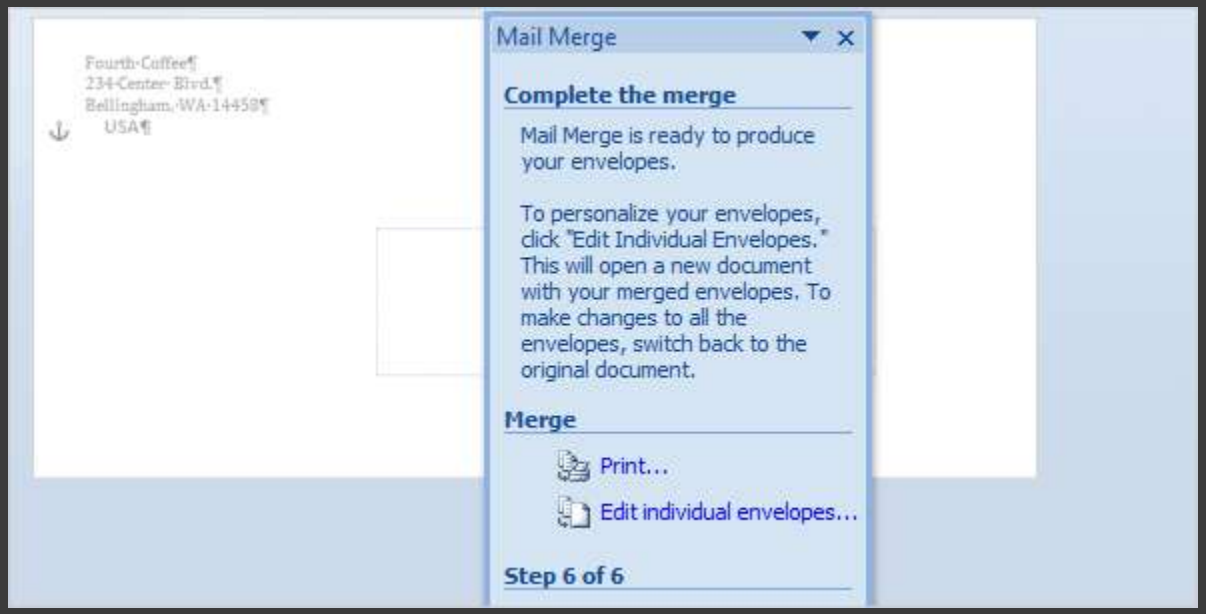
When you're satisfied with previews of the merged documents, you're ready to print the final results.

Click **Print** to open the **Merge to Printer** dialog box.

Last minute changes?

If you still want one more chance to review the results, or if you want to customize selected envelopes, click **Edit individual envelopes** in the wizard.

Complete the merge



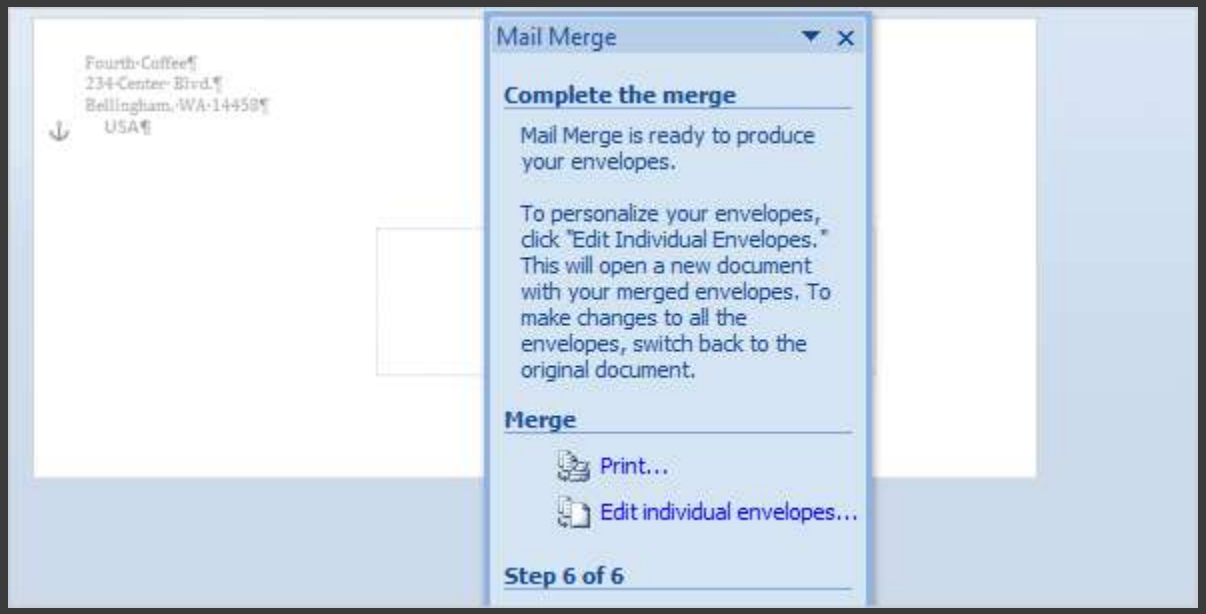
When you're satisfied with previews of the merged documents, you're ready to print the final results.

Click **Print** to open the **Merge to Printer** dialog box.

This creates a separate comprehensive merge that contains all the envelopes in a new Word document.

After you review or modify the envelopes in this comprehensive document, you can print them immediately.

Complete the merge



When you're satisfied with previews of the merged documents, you're ready to print the final results.

Click **Print** to open the **Merge to Printer** dialog box.

Or, just save the document and print the envelopes later. If you want to keep the changes you made to individual envelopes, make sure you save this document.

This comprehensive document is separate from the main document and will be larger in size.

Cancel or resume a merge

You can cancel your mail merge at any time before completing it.

To do this, close the document and choose not to save the changes. The document will be deleted along with the connection to the recipient list.

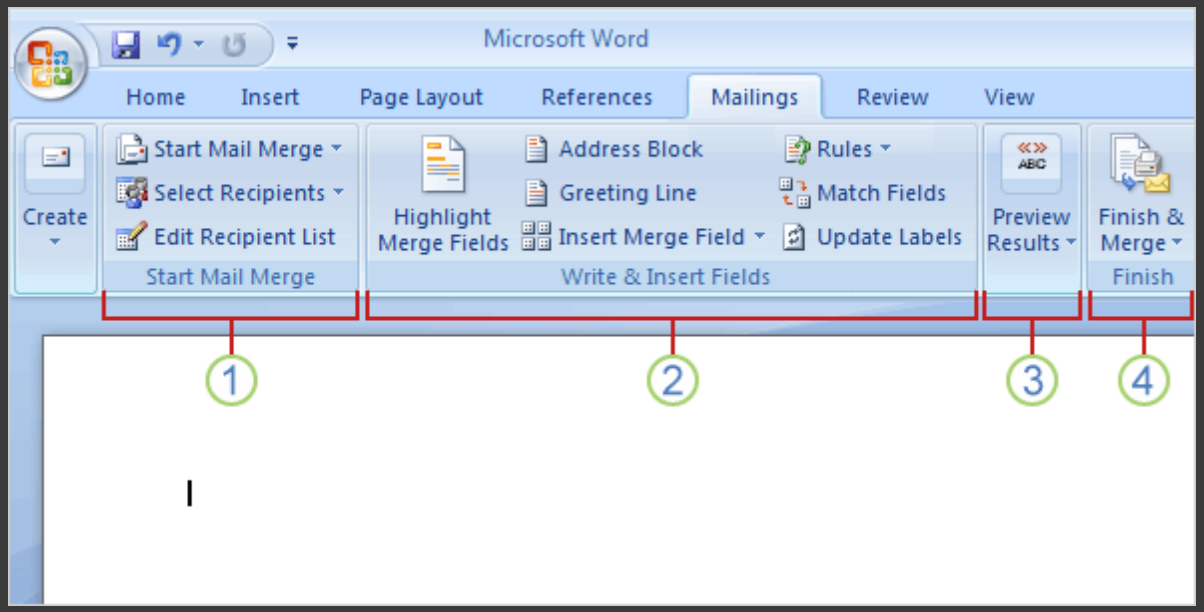
But if you just need to stop working on the merge and want to come back to it later, save the main document.

Cancel or resume a merge

You can cancel your mail merge at any time before completing it.

When you open the document again, Word will ask if you want to keep the connection to the recipient list. Click **Yes** to resume the merge.

Introducing mail merges using the Ribbon

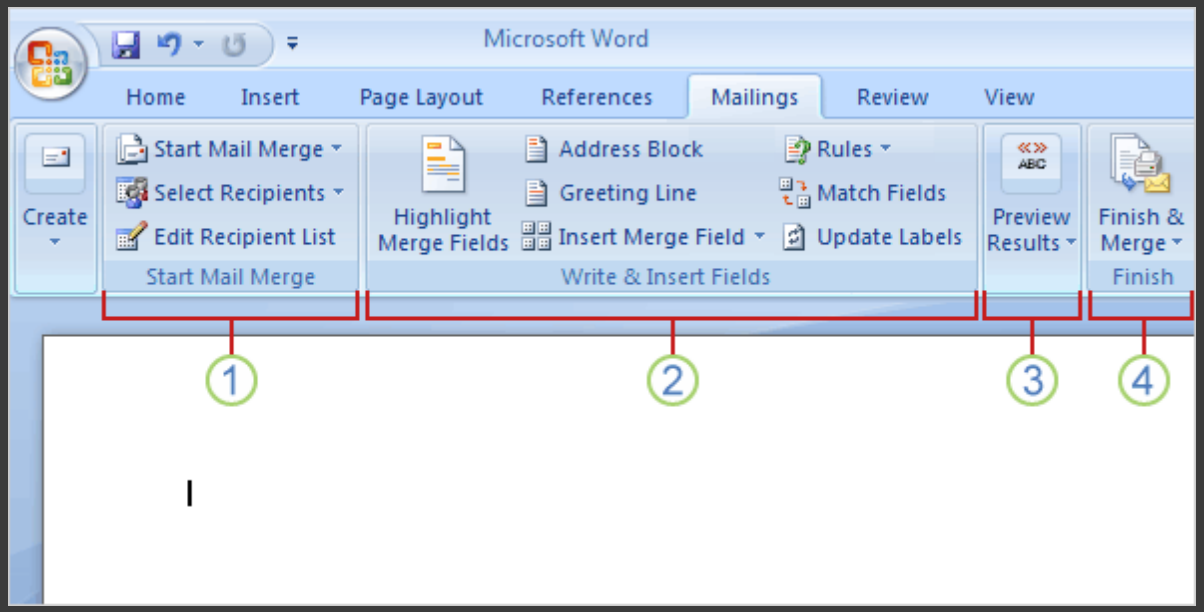


Did you notice that the commands in the **Mailings** tab become available as you step through the wizard?

The Ribbon is also a handy way to do a mail merge and the process is very similar to the steps in the wizard.

Using the Ribbon, you'll have access to more features, such as automatic checking, which looks for errors before you complete the merge.

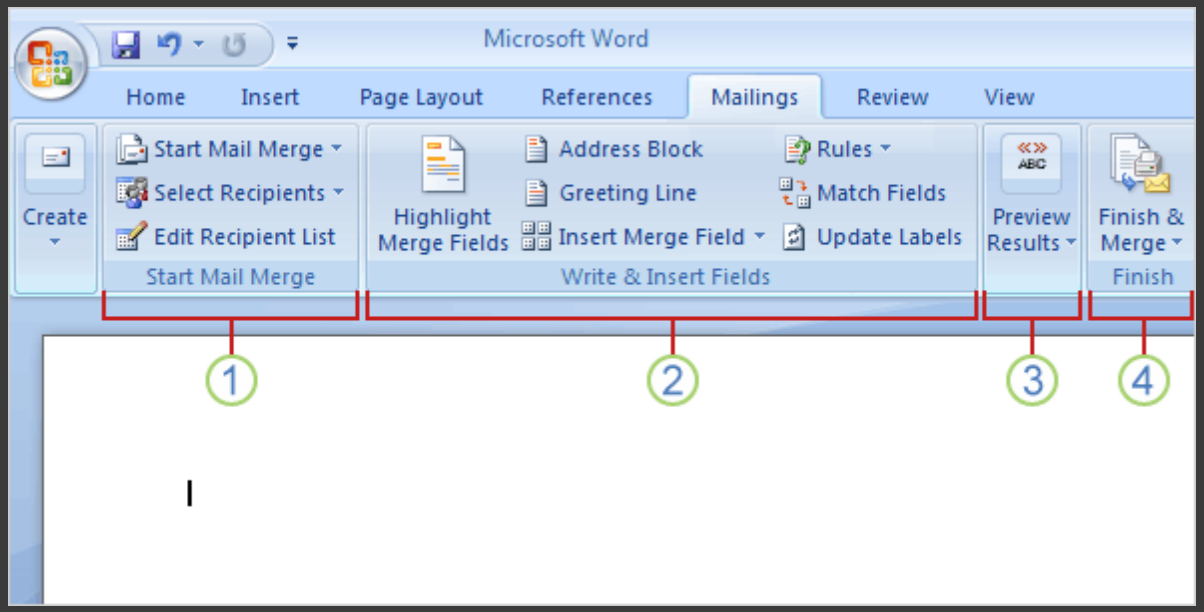
Introducing mail merges using the Ribbon



The commands you use on the **Mailings** tab are in these four groups.

1. **Start Mail Merge**. This is beginning point where you pick a document type and then select, create, or edit the recipient list.
2. **Write & Insert Fields**. Here's where you can insert the merge fields, match your fields, and use **Rules** to perform actions in your documents.

Introducing mail merges using the Ribbon



The commands you use on the **Mailings** tab are in these four groups.

3. **Preview Results**. Besides viewing the individual merged documents, you can use an automatic error checking feature.

4. **Finish**. Complete the merge and combine your individual documents into one comprehensive document, or print them out, or send them electronically.

Suggestions for practice

- Open the Mail Merge Wizard and set up the main document.
- Connect to your recipient list and choose the people you want to send mail to.
- Type content and insert fields.
- Preview and match fields.
- Complete the merge.

Online practice
(requires Word 2007)

Test 3, question 1

- **How do you open the Mail Merge Wizard? (Pick one answer.)**

1. Click the **Microsoft Office Button**, and then **Word Options**.
2. On the **Mailings** tab, click **Start Mail Merge**.
3. On the **Insert** tab, click **Quick Parts**.

Test 3, question 1: Answer

- On the **Mailings** tab, click **Start Mail Merge**.

Test 3, question 2

- **How do you exclude a person from a mail merge? (Pick one answer.)**

1. Delete all the information in the recipient list for that person.
2. Delete the document addressed to that person when you preview the merge.
3. Use the check boxes in the **Mail Merge Recipients** dialog box.

Test 3, question 2: Answer

- Use the check boxes in the **Mail Merge Recipients** dialog box.

The **Mail Merge Recipients** dialog box is where you can designate the people that will be included in the final merge.

Test 3, question 3

- **After you choose to preview your documents, the merge is complete and you can't make changes. (Pick one answer.)**

1. True.
2. False.

Test 3, question 3: Answer

- False.

Preview gives you a chance to look at your merged documents before the merge is complete.

Quick Reference Card

- For a summary of the tasks covered in this course, view the Quick Reference Card.

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