MAIL MERGE – TRAINING GUIDE

Objectives

Users completing this course will be able to perform the following tasks:

- Perform a mail merge using the Mailings tab, the Mail Merge Wizard, or a mail merge template.
- Format, sort and filter data prior to performing the merge.
- Create and perform a merge using an Excel Recipient List.
- Perform a merge using Outlook Contacts.

Elements of a Mail Merge

The Mail Merge feature automates time-consuming tasks such as mass mailings, labels, envelopes, name tags, and internal memorandums and reports. Data can be taken from a new or existing table or spreadsheet and inserted into a form document to create a third and final document.

The three main elements are:

- **Main Document:** also known as the Form Document, contains the merge fields where the data will be inserted for each record.
- **Recipient List:** also known as the Data Source, this List is the new or existing file which hosts the merge data records, such as a person's name and mailing information. In this example, each person represents a data record. This Recipient List can be contained in a Word table, an Excel Spreadsheet, a set of Outlook Contacts, or any MAPI-compliant database, including Access or SQL.
- **Merged Document:** the final product of the merge, with each record separated by a section break, in the case of letters and envelopes and a <<Next Record>> merge field in the case of labels.

The Mailings tab contains four groups which provide the basic steps for creating any type of mail merge document – letters, labels, envelopes, directories or e-mails.

The Mail Merge Wizard walks users through the process on a step-by-step basis. This is a great option for users new to the concept of merging documents.

The Main Document and the Recipient List can either be created from scratch, or existing documents can be used.

The basic steps for performing a Mail Merge are:

- Create or open the Main Document.
- Create or open the Recipient List.
- Insert the merge fields into the Main Document.

- Merge the Recipient List with the Main Document to create the Merged Document.

The following exercise provides a preview of each type of document, including two different types of Recipient Lists, one from Word and one from Excel.

Class Exercise 1
Exploring the Documents that Make Up a Mail Merge

1. **Open Training Guide Document – Recipient List and save it as MyData.**
2. **View the Word Recipient List document.**

   > This Recipient List is in Word table format, with the column headings defining the names of the merge fields.

3. **Close the Word Recipient List document.**
4. **Open Training Guide Document - Excel Recipient List Document and save it as MyExcelData.**

   > This Recipient List is an Excel Worksheet, with the column headings defining the names of the merge fields. While Excel workbooks can be profiled in a document management system, accessing the Recipient List to perform the merge may not be an available option within the document management system. Therefore it is best to save the Excel Recipient List to the local drive.

5. **View the Excel Recipient List document.**
6. **Close the Excel Recipient List document.**
7. **Open Training Guide Document – Main Document and save it as MyMainDoc.**
8. **Close the Main Document file.**
9. **Open Training Guide Document – Merged Document.**
10. **Explore the completed merge.**

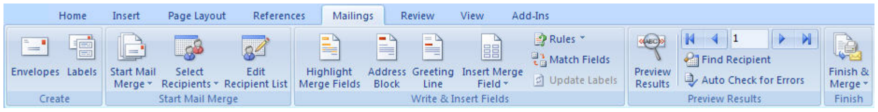
    > A separate letter appears for each record of the Recipient List, which is separated by a Next page section break. Notice that the letters are sorted by last name and then by first name. The sort order is determined during the mail merge setup. By default, merges are sorted by the order the records appear in the Recipient List document.

11. **Close the document without saving any changes.**

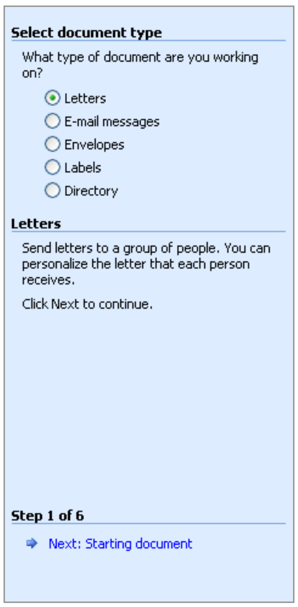
Mail Merge Methods

There are three methods available to perform a mail merge:

- **Using the Mailings tab:** users perform each mail merge task using the groups and buttons on the Mailings tab.



- **Using the Mail Merge Wizard:** opens the Mail Merge task pane and walks users through a six-step process to perform a merge: 1) selecting the type of merge – letter, e-mail, envelope, labels or directory; 2) creating or opening the Main Document; 3) creating or opening the Recipient List; 4) inserting the merge fields into the Main Document; 5) previewing the merged document; 6) performing the merge.



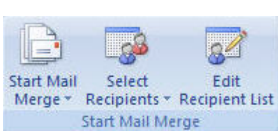
- **Using a Mail Merge template:** users select a template containing the predefined merge fields, then use the Mailings tab or Mail Merge Wizard to select their Recipient List and perform the merge.

Exploring the Mailings Tab

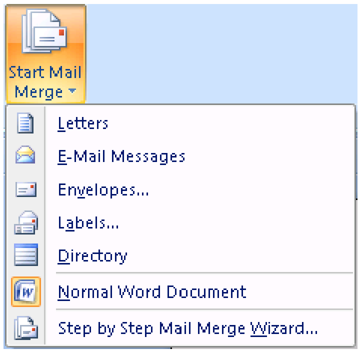
Each group of the **Mailings** tab has a specific purpose for completing a Mail Merge: 1) choosing the Main Document and the Recipient List, 2) inserting fields, 3) previewing the results; and 4) finishing the merge. The functions available in each group include the following:

The Start Mail Merge Group

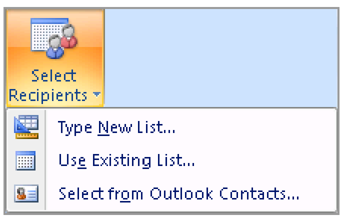
From this group, choose the document type and the recipients list, and sort the recipients.



Start Mail Merge Choose the type of document to be merged, including letters, envelopes, labels, e-mails or directories. The Mail Merge Wizard is also launched from this drop-down menu.



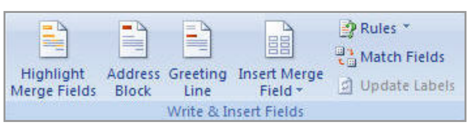
Select Recipients Choose the type of data source by typing a new list, selecting an existing list from a file, or selecting Outlook recipients.



Edit Recipient List Displays a table listing all the Recipient List records. This list can be edited and manipulated.

The Write & Insert Fields Group

From this group, insert and define custom merge fields, and update labels.



Highlight Merge fields Toggles shading of merge fields on and off for easy identification.

Address Block Displays the Insert Address Block dialog box, designating the information included in the address block of the Main Document.

Greeting Line Displays the Insert Greeting Line dialog box, designating the information included in the greeting line of the Main Document.

Insert Merge field (button) Displays the Insert Merge field dialog box, providing a choice of fields defined by the Recipient List. The **Insert Merge**

drop-down menu provides the same choice of merge fields defined by the Recipient List.

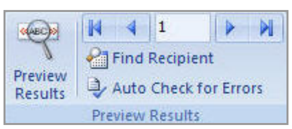
Rules Inserts Word fields such as Ask, Fill-In, Next Record, etc.

Match Fields Matches the fields in a database with the fields in the address block.

Update Labels Generates labels, once the Main Document has been set up and the Recipient List has been defined.

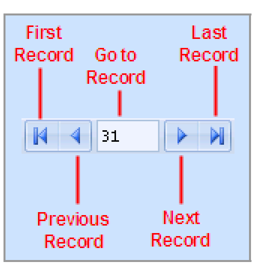
The Preview Results Group

From this group, preview the merged file, find records and navigate through them.



Preview Results Replaces the merge fields in the document with data from the recipient list, providing a preview of the completed merge.

Go to Record Jump forward or backward to a specific record in the document. The Go to Record field displays the record number.

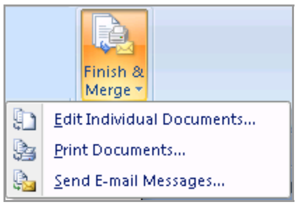


Find Recipient Displays the Find in Field dialog box to locate a specific record in the document by text and field.

Auto Check for Errors Displays the Checking and Reporting Errors dialog box to check for errors before the merge is completed. Provides multiple options for viewing errors.

The Finish Group

Finish & Merge Displays a drop-down menu for completing the Mail Merge. Select from the following:



Edit Individual Documents… Performs the merge and creates a new merged document for individual editing.

Print Documents… Performs the merge and opens the Print dialog box to print the merged documents.

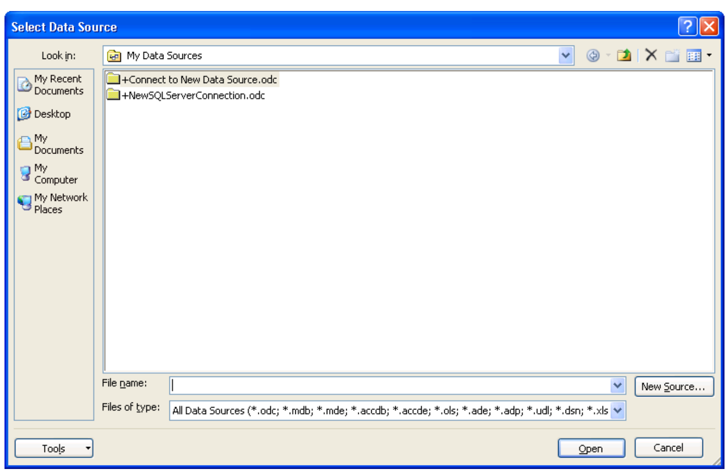
Send E-mail Messages… Performs the merge and creates a new e-mail for each recipient.

Class Exercise 2
Using the Mailings tab

1. **Open the document MyMainDoc.**

2. **From Mailings | Start Mail Merge, click on the Select Recipients button and select Use Existing List….**

   The Select Data Source dialog box opens.

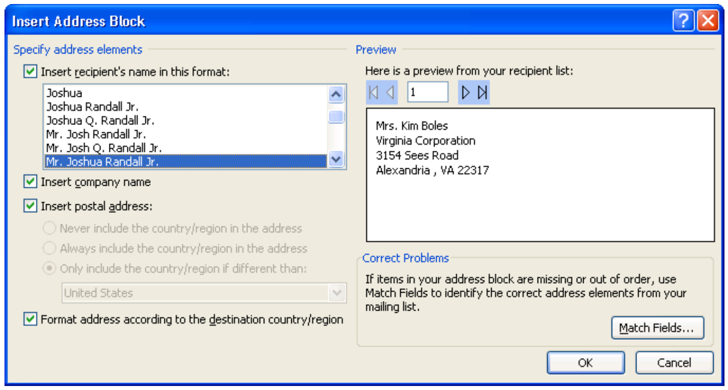


3. **Locate and double-click on the MyData file to associate the Recipient List with the Main Document.**

4. Place the insertion point in the Main Document where the address field is to appear.

5. From Mailings | Write & Insert Fields, click on the Address Block button.

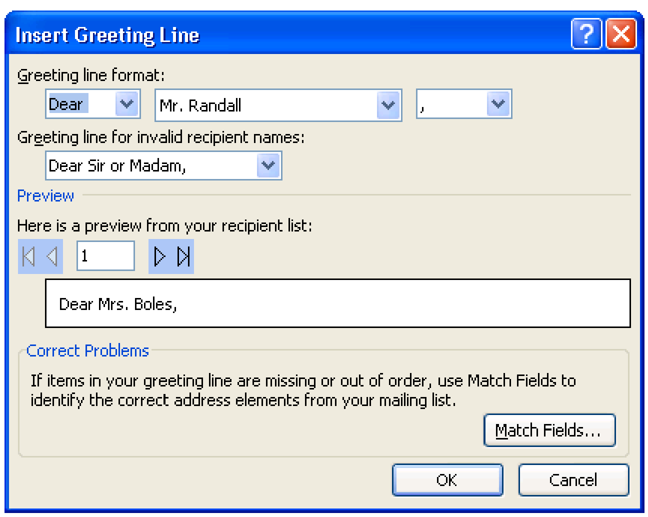
   The Insert Address Block dialog box opens with the default options selected.



6. Click on the OK button to accept the settings and close the dialog box.

7. Place the insertion point in the Main Document where the greeting line is to appear, then click on the Greeting Line button.

   The Insert Greeting Line dialog box opens with the default options selected.



8. Click on the Greeting line format: drop-down arrow for the third field.

9. Select the“:” (colon) from the list of options to replace the “,” (comma).

10. Click on the OK button to accept the settings and close the dialog box.

11. **Insert any additional lines between the greeting and the main body of the document as needed.**

12. **Select the word "[amount]", including the brackets, in the body of the Main Document.**

13. **From Mailings | Write & Insert Fields, click on the Insert Merge Field button to open the Insert Merge field dialog box.**

14. **Select <<Amount>> from the list of options, then click on the Insert button.**

15. **Click on the Close button to return to the document.**

> The advantage of using the Insert Merge field dialog box is users not only can open the Match Fields dialog box, but can access more fields by clicking on the Address Fields radio button.

16. **Select the word "[party]," including the brackets in the first paragraph of the Main Document.**

17. **From the Write & Insert Fields group, click on the Insert Merge field drop-down arrow and select Party to replace the word.**

The merge field <<Party>> is inserted.

18. Repeat steps 10-12;

-OR-

Repeat step 14 to replace the word [party] in the second paragraph with the merge field <<Party>>.

19. From Mailings | Preview Results, click on the Preview Results button to preview the merged document.

20. From the Preview Results group, click on the Next Record button  **to move forward through the records.**

21. Click on the Previous Record button  **to move backward through the records.**

22. From the Preview Results group, click on the Find Recipient button to open the Find in Field dialog box.

23. In the Find what: field type French.

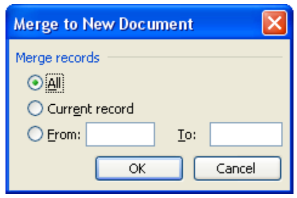
24. Click on the In field: drop-down arrow and select LastName from the list.

25. Click on the Find First button to search for the first occurrence of the last name "French."

Record number 16 is displayed and the Find First button has changed to a Find Next button.

26. Click on the Close button.

27. **From Mailings | Finish, click on the Finish & Merge button, then select Edit Individual Documents… to open the Merge to New Document dialog box.**



The All radio button is selected by default.

28. **Click on the OK button to perform the merge.**

29. **Close both documents without saving changes.**