



Word 2007

Mail Merge

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Mail Merge

The merge facility enables you to combine data such as names and addresses with information contained in a Word document, such as a letter. It would enable the same letter to be sent to multiple addresses without the need to create an individual letter for each person. You can also send personalised emails using your list of Contacts in Outlook. The data can also be taken from other applications, for example, an Excel spreadsheet or Access database.

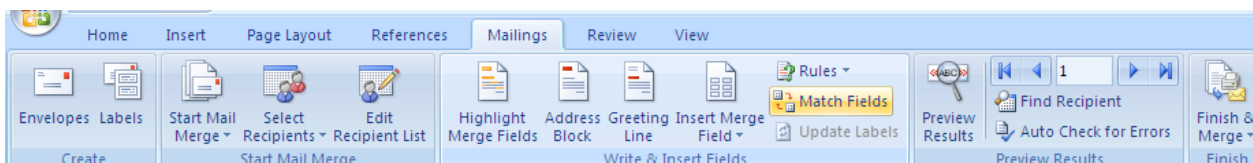
If you are not using data from another application, then you will need to start by creating the data file: this will contain the names and addresses to be used. These can be added to, and amended and used as many times as you wish.

Secondly, you will need to create a merge document, which contains the fields from your data file, which will link the merge document with your data file.

Finally you will need to merge the two documents together: either to another document or directly to the printer.

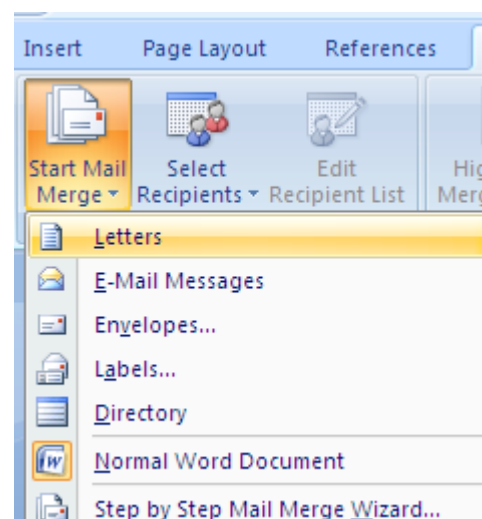
Using Mail Merge to Send Letters

The Wizard is limiting and will take some time to work thorough. The following steps are performed via the ribbon using the **Mailings** tab. The buttons are worked through left to right, starting from the **Start Mail Merge** category, so all very logical!

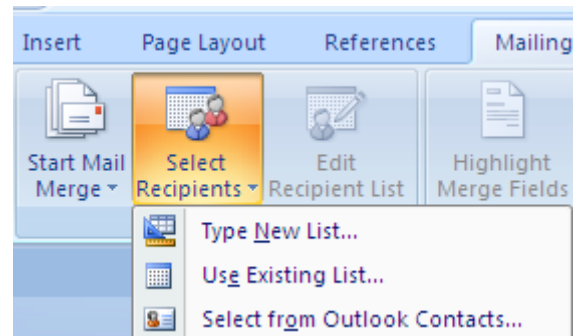


You can start with the intended letter already open, or type it once you have created or selected your recipient list:

1. From the **Start Mail Merge** category
2. Click on the **Start Mail Merge** button
3. Select **Letters**

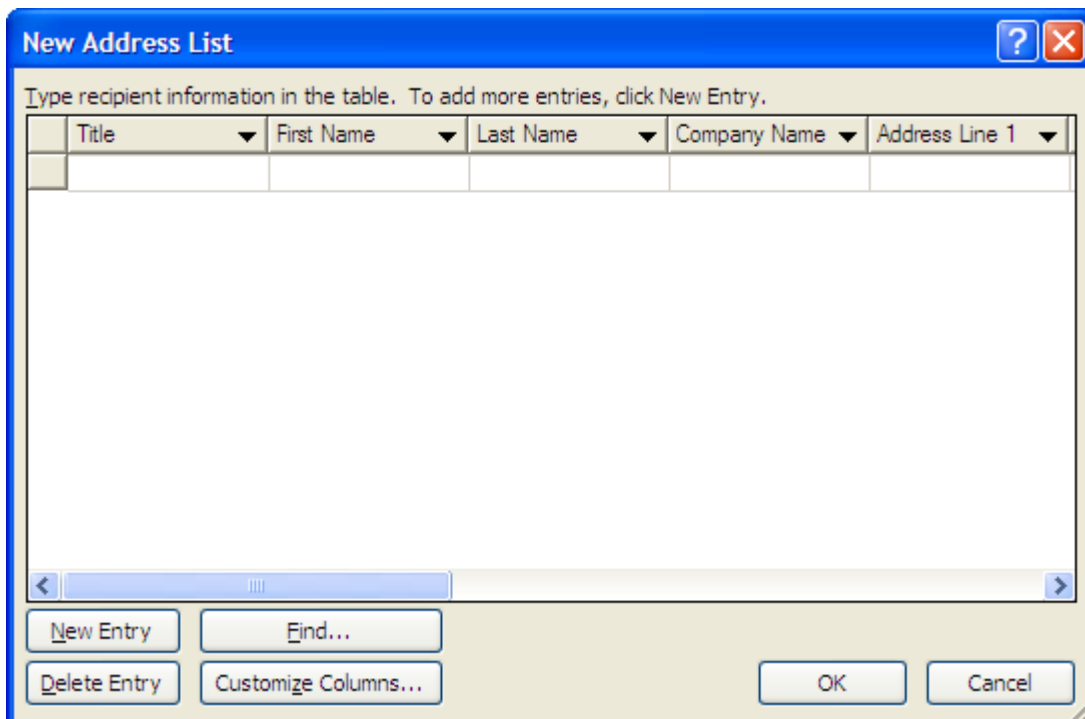


4. Next click on **Select Recipients**



Creating a Data Source

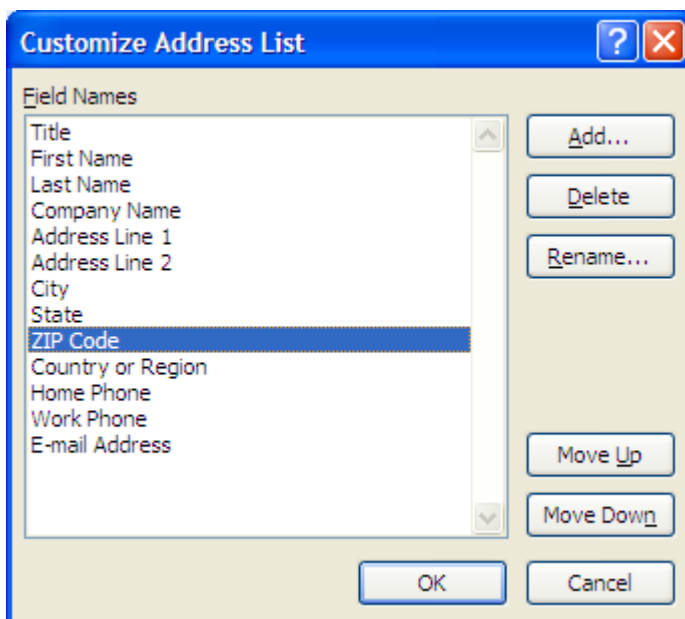
1. If you don't already have a suitable list, such as names and addresses (or other fields) in an Excel spreadsheet or Access table, you can create a data source through Word: Select **Type New List**



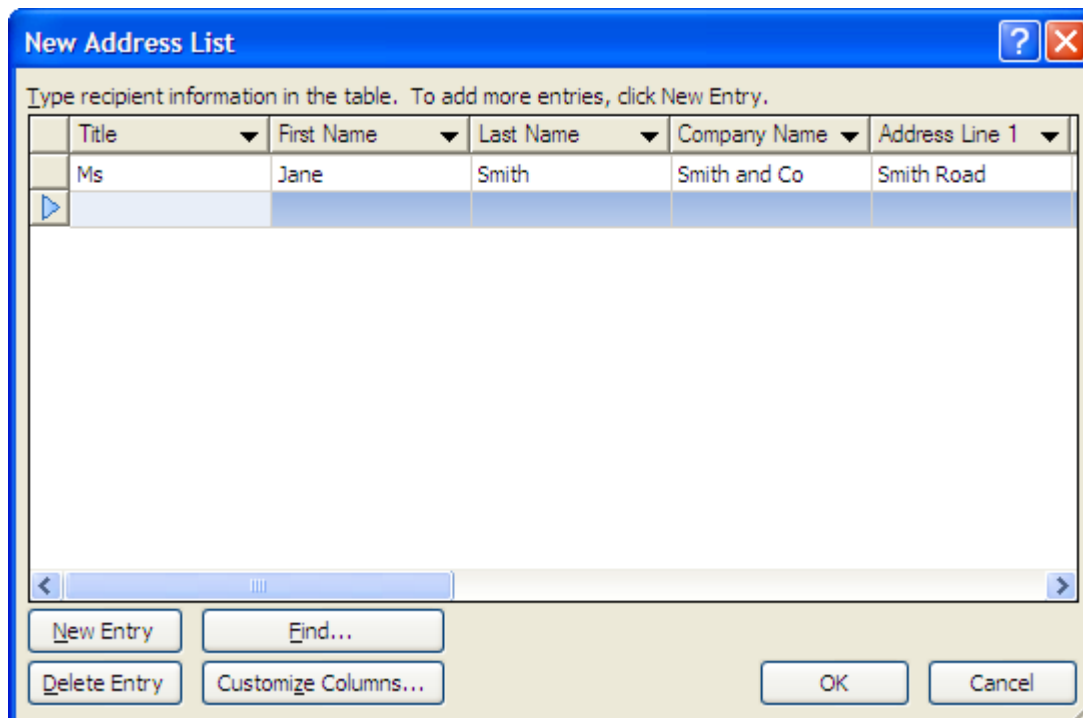
Title	First Name	Last Name	Company Name	Address Line 1

2. You can use the existing fields already suggested by Word, but you will probably need to modify some of the names eg Post Code for Zip Code, Delete Fields not required or Add other fields.

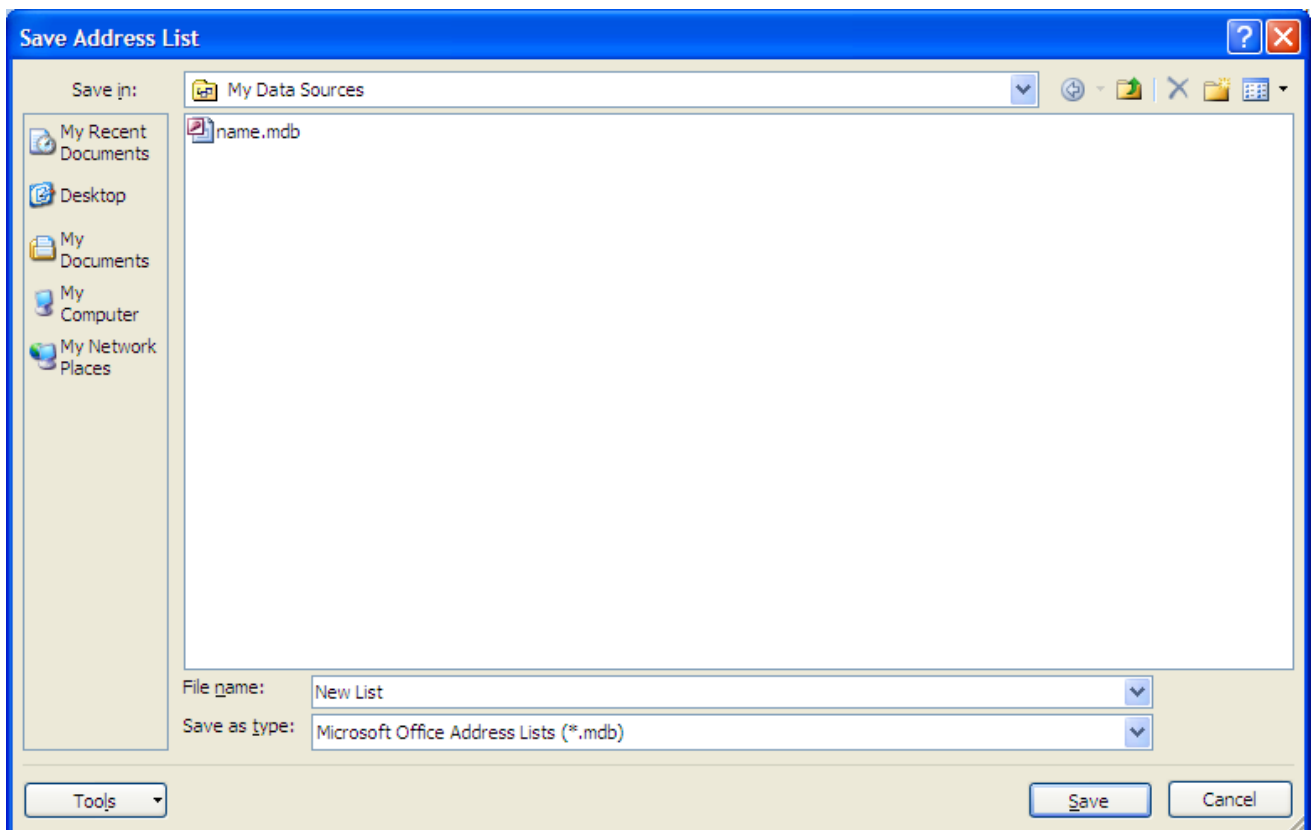
3. Select **Customize Columns...**
4. You can then **Rename**, Add new fields in or **Delete** any fields which you don't need



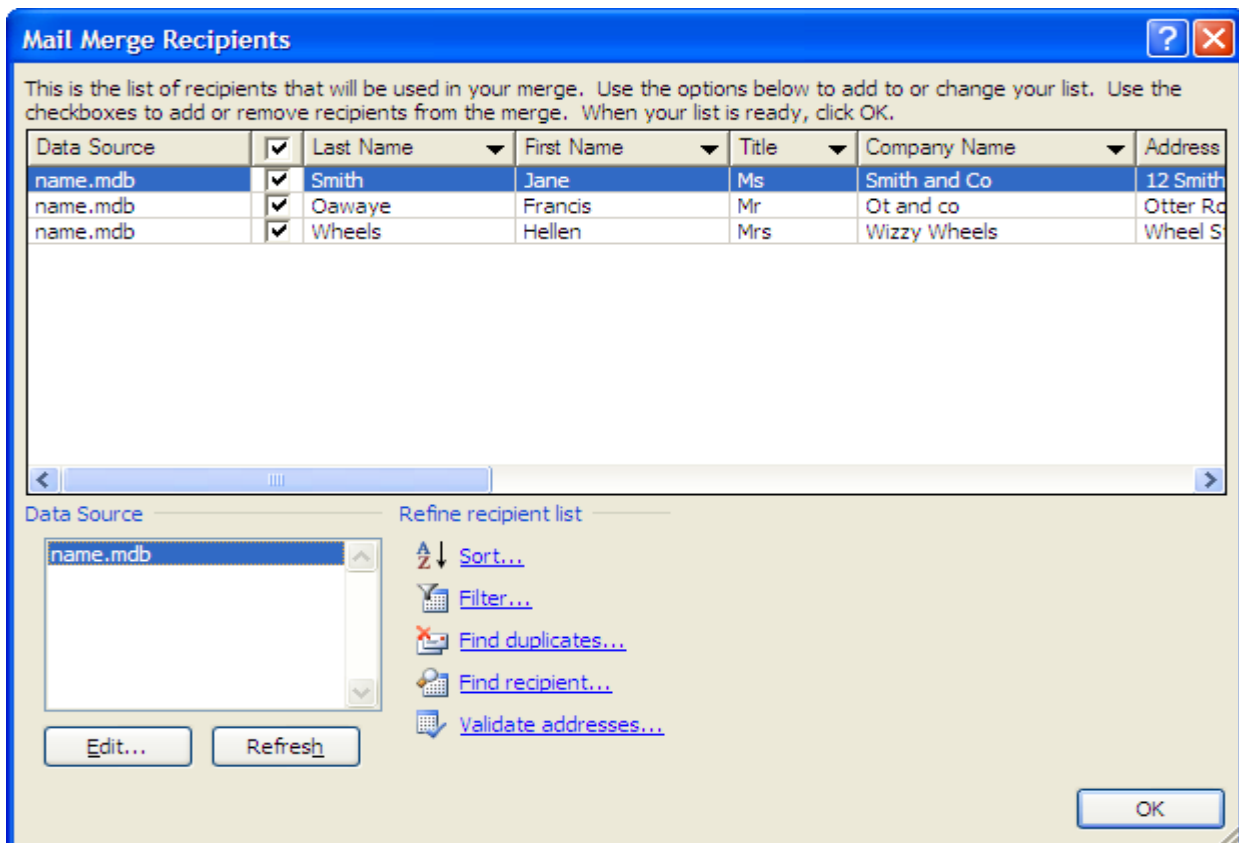
se the Tab key to move between the fields and click the **New Entry** button to add a new record. *Don't press **Enter** – Word will assume you've finished adding records and take you to the File Save dialogue.*



When you are ready to save your records, click on OK. Type in the name for your list (note that the file will be saved as a Microsoft Office Address List .mdb file which is a database type of file). The default folder will be My Data Sources:

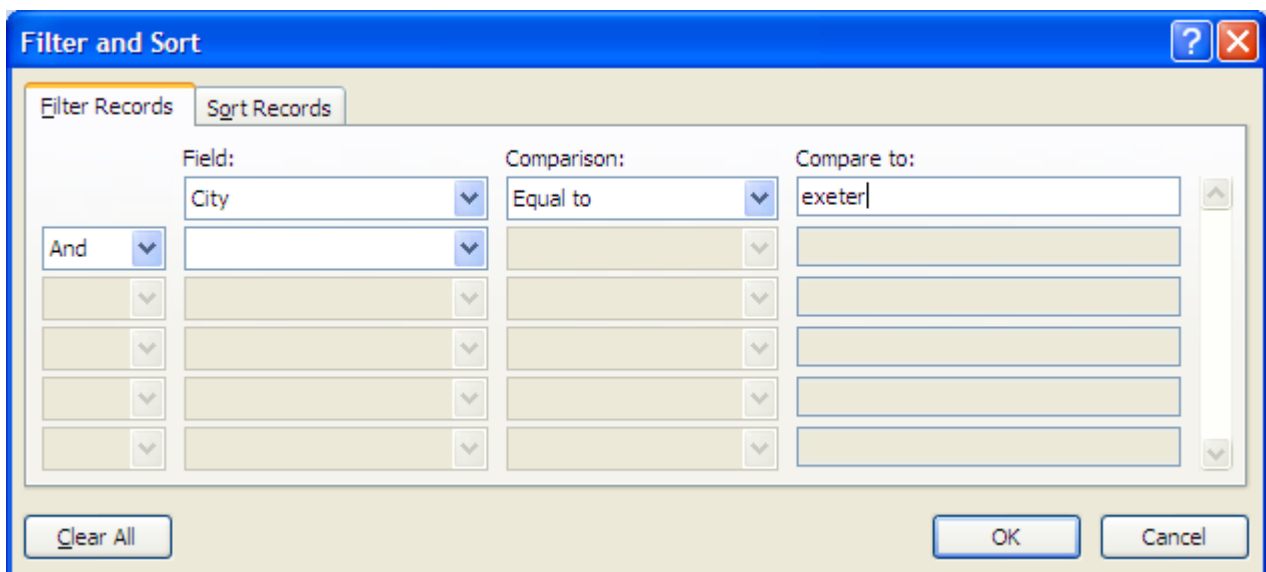


Click on **Edit Recipient List** to make any additions or amendments to your records:



To Edit your Data Source:

1. Select the **Data Source** (click on the name of your database file)
2. Then click the **Edit...** button to make any changes to the records
3. Click on any of the field names to filter the records to match your criteria: eg a **Town** field to select only the people living in Exeter. Or click on the **Filter...** button to display the **Filter and Sort** dialogue:



NB: To edit the list in the future, you can go through the same process as explained above, or open the file directly in Microsoft Access and edit it there.

Adding Merge Fields to your Letter

You can use the **Address Block** button to add all the address fields into your letter as one block. This will need some amendment, as fields that you may have added or renamed may not appear. Remember to position your cursor where you would want the address to appear:

Insert Address Block

Specify address elements

☒ Insert recipient's name in this format:

Joshua
Joshua Randall Jr.
Joshua Q. Randall Jr.
Mr. Josh Randall Jr.
Mr. Josh Q. Randall Jr.
Mr. Joshua Randall Jr.

☒ Insert company name

☒ Insert postal address:

☐ Never include the country/region in the address
☐ Always include the country/region in the address
☒ Only include the country/region if different than:

United Kingdom

☒ Format address according to the destination country/region

Preview

Here is a preview from your recipient list:

Ms Jane Smith
Smith and Co
12 Smith Road
Pennsylvania
Exeter

Correct Problems

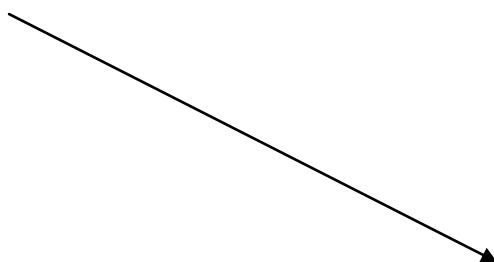
If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.

Match Fields...

OK Cancel

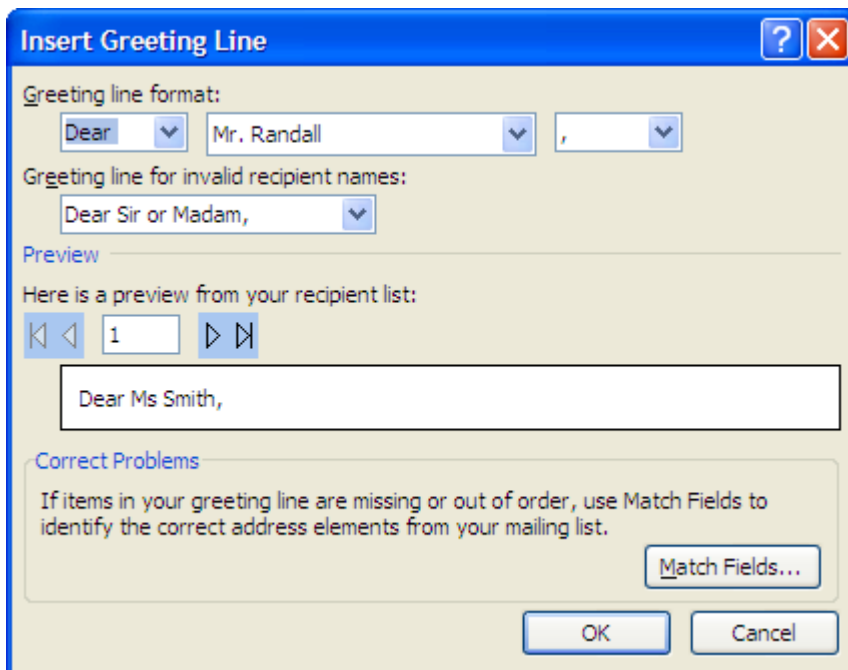
In the above example, the Post Code field does not appear so will need to be matched to the relevant address field component:

1. Click on the **Match Fields...** button
2. Click on the drop-down against the field you want to match with your own field name. Eg **State** could have been changed to **County**
3. **Check the option box at the bottom to ensure that the match setting remain for future letters**



The greeting line

Position your cursor where you would want your greeting line to appear, and click on the **Greeting Line** button:



The screenshot shows the 'Insert Greeting Line' dialog box. It has a blue title bar with a question mark and a close button. The main area is light beige. At the top, it says 'Greeting line format:' followed by a dropdown menu set to 'Dear', a text box containing 'Mr. Randall', and another dropdown menu set to ','. Below this, it says 'Greeting line for invalid recipient names:' followed by a dropdown menu set to 'Dear Sir or Madam,'. A horizontal line separates this from the 'Preview' section. The preview section says 'Here is a preview from your recipient list:' followed by navigation buttons (first, previous, next, last) and a text box containing 'Dear Ms Smith,'. Below the preview, there is a section titled 'Correct Problems' with the text 'If items in your greeting line are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.' and a 'Match Fields...' button. At the bottom right are 'OK' and 'Cancel' buttons.

This usually does not need much amendment, but you could also match fields as in the Address Block.

Your letter would look something like this:

«AddressBlock»

«GreetingLine»

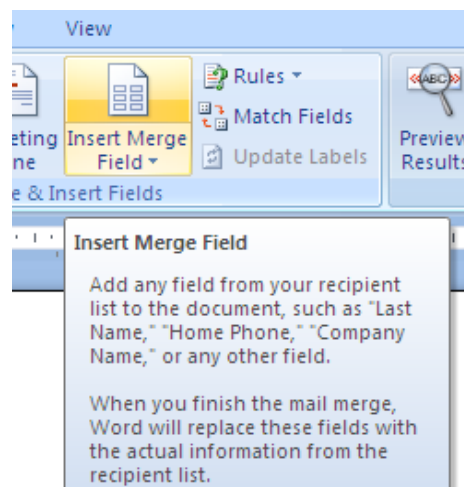
I am afraid that you have exceeded your limit of £«Credit_Limit».

Please pay the balance within the next 7 days to avoid legal action.

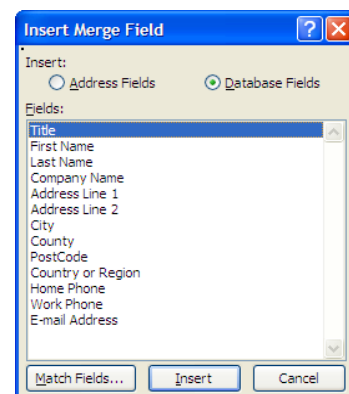
Yours sincerely

Adding in other fields

You may prefer not to use the **Address Block** or **Greetings Line** buttons at all and add in your own field codes as and where required. You may have other fields that you want to include elsewhere in the letter (or other document). You can use the **Insert Merge Field** button to do this:

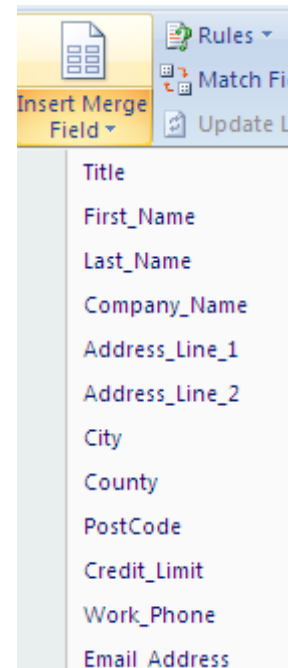


- Clicking on the upper part of the button will allow you to match the address fields in a similar way to the Address Block :



- Clicking on the lower part on the button would display a list of all the fields you have in your current Recipient List and you can add these in wherever you want in your document:

Remember to insert appropriate spacing and punctuation between your field names and/or other text.



Your letter would look something like this:

«Title» «Last_Name»
 «Company_Name»
 «Address_Line_1»
 «Address_Line_2»
 «City»
 «County»
 «PostCode»

Dear «First_Name»

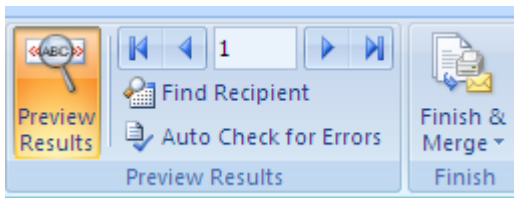
I am afraid that you have exceeded your limit of £«Credit_Limit».

Please pay the balance within the next 7 days to avoid legal action.

It would be a good idea to save you letter with the field codes at this point. You could edit it and use it for future mailings.

Preview your results

To check the layout of our letters prior to printing, click on the Preview button in the **Preview Results** category of the **Mailings** tab:



You can use the left and right arrow to move between the individual letters or to the first or last letter.

1. Click on **Find Recipient** to go to a particular record



2. **Auto Check for Errors** will check for any errors that may occur during the merge and report on this at various stages

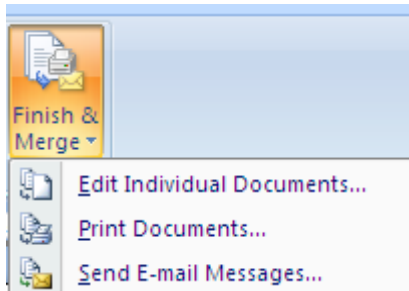


Completing your merge

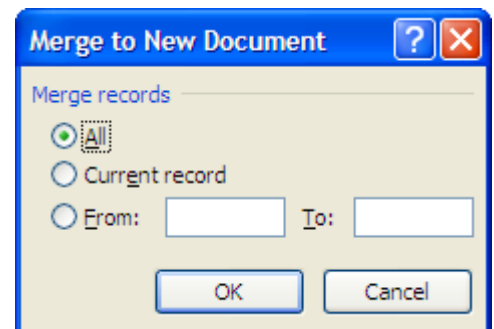
You can output your merged letters directly to the printer, but you may want to merge to another document first and then print from there:

To merge to another document

The results of the merge can be output to a document which you can check and make changes to individual letters first and then print from there:



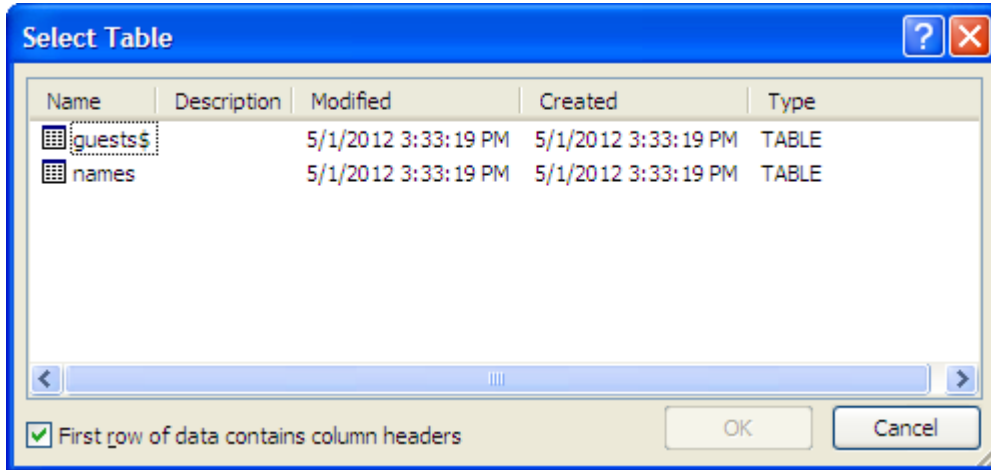
1. Click on the **Finish & Merge** button
2. Select **Edit Individual Documents**:
3. Select the relevant option of how many letters to print
4. Click on OK
5. You will then have a new document which contains all the individual letters
6. You can then print this after completing the check (the result of the merge would not normally be saved).



Mail Merge using an Excel Spreadsheet

If you already have a list stored in Excel, you can use this as an existing Recipient List. Click on **Select Recipients** and select **Use Existing List**, and locate your Excel file:

The following dialog will be displayed:



You will see a list of worksheet names from your file. Select the one which contains the list you want to use. Make sure that the first row in this sheet contains field names and that your records start directly underneath. If not, you will have to name the range starting with the headings.

In the above example, **guests\$** is a worksheet name and **names** is a range name in the Excel workbook.

An Access Table or Query can be used in the same way.

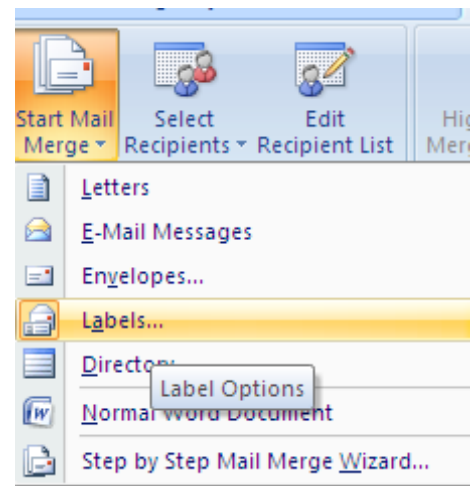
Merging to Address Labels

Labels can be produced using mail merge in the same way as letters.

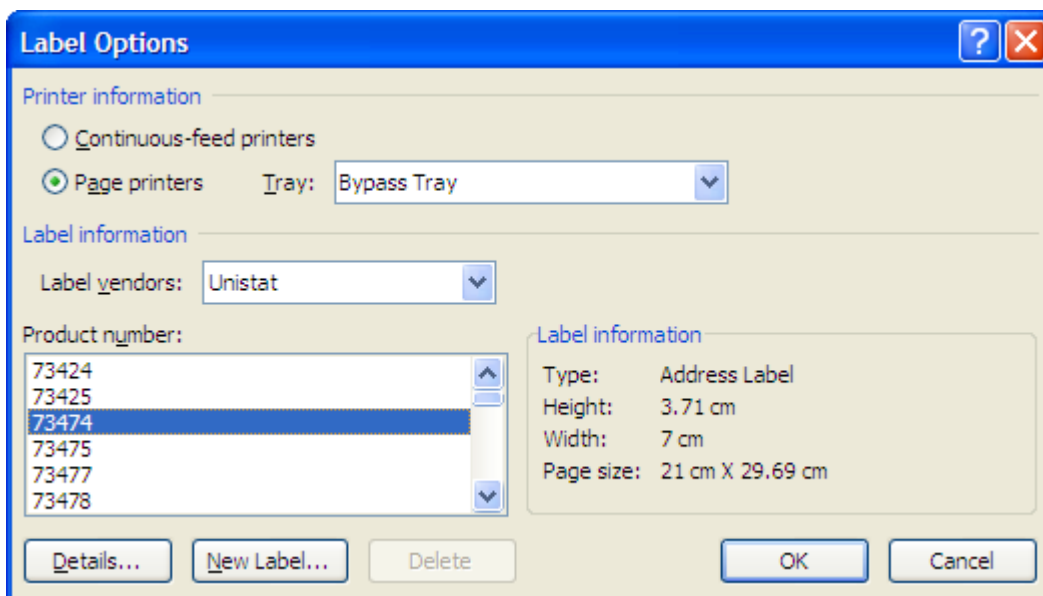
There are many types of labels available and you may need to experiment to find which template fits the labels you use. The most common label used for mailing labels is 3 across by 8 down. The template which fits this type is Unistat 73474 but this is just an example. If your labels don't appear in the list that Word offers, you can create your own by measuring the labels, the distance from the edge etc and use this as a future template.

Using Mail Merge to create address labels

1. From the **Mailings** tab, click on **Start Mail Merge**
2. Select **Labels...**



3. From **Label Options**, select the Label vendor and Product number:



3. If your label doesn't appear in the list, click on **New Label...** and enter the name you want to give your labels and the measurements:

Label Details [?] [X]

Preview

Diagram labels: Side margins, Top margin, Horizontal pitch, Vertical pitch, Width, Height, Number across, Number down.

Label name:

Top margin: Label height:

Side margin: Label width:

Vertical pitch: Number across:

Horizontal pitch: Number down:

Page size:

Page width: Page Height:

4. You can then use this label template again, as it will appear in the list:

Label Options [?] [X]

Printer information

☐ Continuous-feed printers

☒ Page printers Tray:

Label information

Label vendors:

Product number:

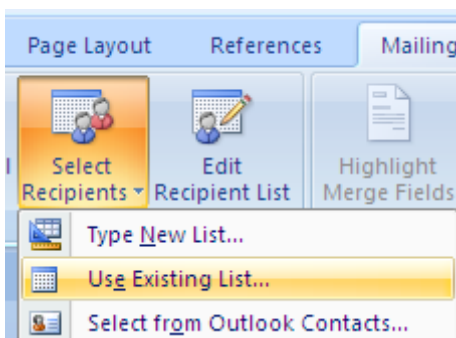
Label information

Type: Custom laser
Height: 3.71 cm
Width: 7 cm
Page size: 21 cm X 29.69 cm

You should then see a label template:

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

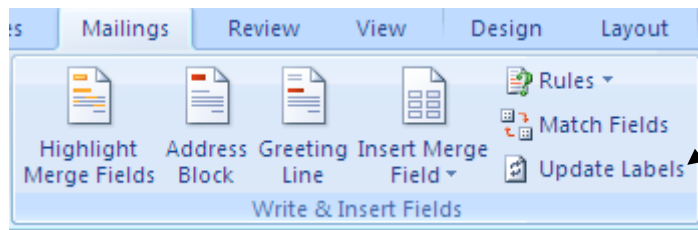
Next, click on **Select Recipients** to select your recipient list. See **Creating a Data Source on Page 4** if you don't already have a suitable list of names and addresses (or other fields you require for your labels).



Adding the Address Fields

1. You should see that you have <<NextRecord>> in each section of the document except the top left
2. You can use the **Address Block** button to add all the address fields into the first blank label (or add each field in separately with the **Insert Merge Field** button, as described on **Page 8 - Adding Merge Fields**)

«Title» «Last_Name» «Company_Name» «Address_Line_1» «Address_Line_2» «City» «County» «PostCode»	«NextRecord»
«NextRecord»	«NextRecord»



3. Click on the **Update Labels** button to populate the field codes to the other labels:

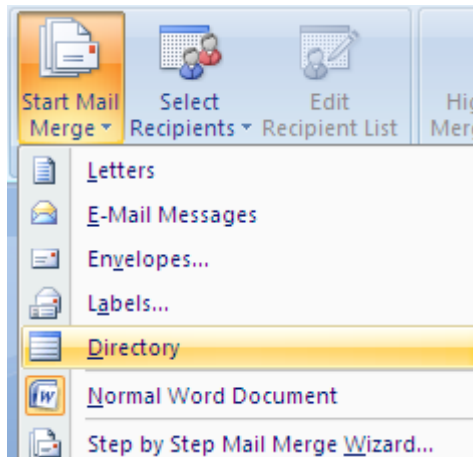
4. Click on **Preview Results** and you should see a sheet of labels with the address information inserted correctly.

5. **Finish & Merge** as before. You will probably want to save the result of this merge, if you want to use the labels again.

Creating a Directory Using Mail Merge

A Directory is just a printed list of field information from your data source. It can be produced on a blank document or within a table depending on how you wish the information to be displayed. For a table, in a blank document create a table with enough columns to display the field information you require, **but only one row** (if you create two rows then your directory will have a blank row in between each record.)

1. Click on **Start Mail Merge** button and select **Directory**:

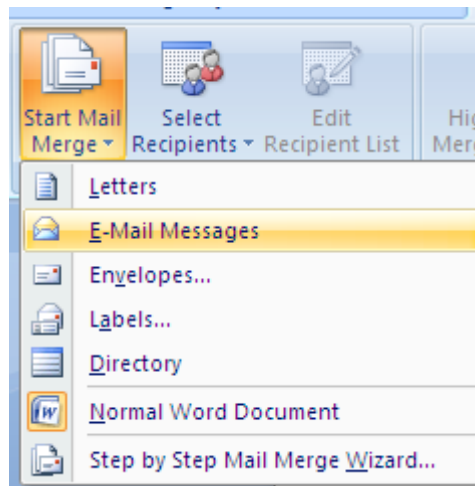


2. Click on **Select Recipients** and select your recipient list
3. Insert the merge fields you require – either as an **Address Block** or individually using **Insert Merge Field**
4. If you are not inserting the fields into a table row, make sure you press **Enter** at the end of the line (so you have a carriage return marker at the end), otherwise there will not be a line break at the end of each record.
5. **Preview Results** to check the field information from the first record (you won't see the Directory as continuous list at this stage yet).
6. Click on **Finish & Merge** and select **Edit Individual Documents**, **OK** to complete the merge.

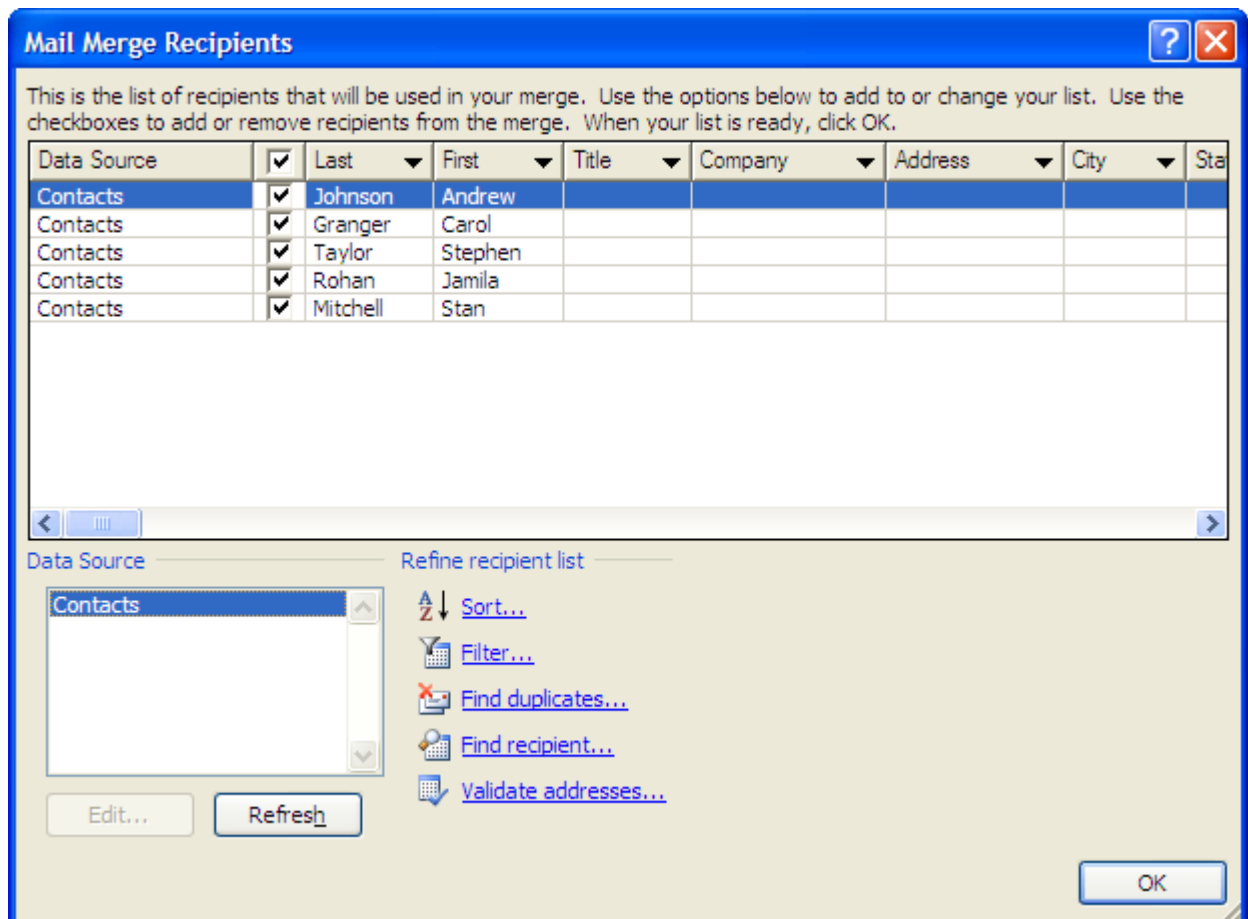
Merging to Email Messages

You can merge to your Outlook Contacts (or other database file containing email addresses) and send out individual messages to each contact.

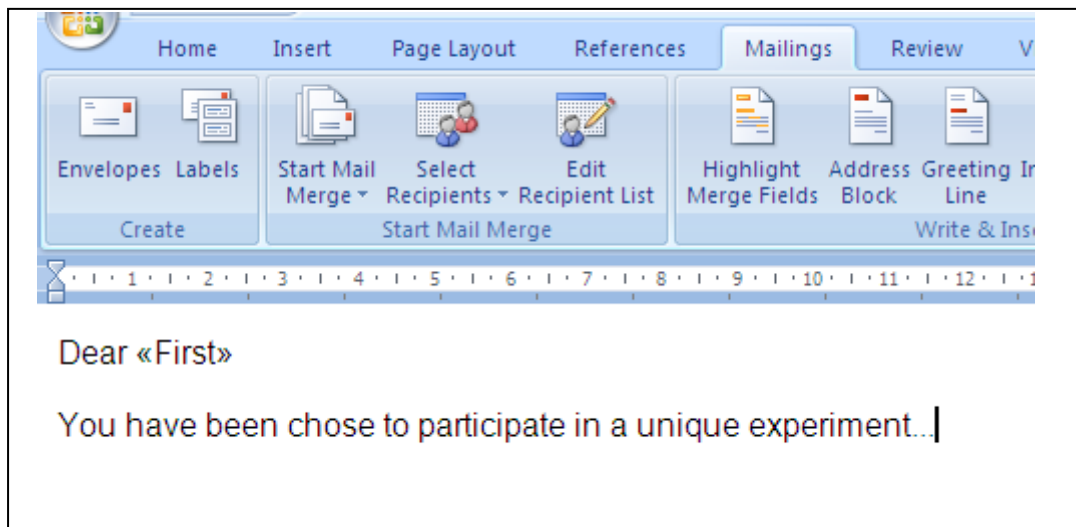
1. Click on the **Start Mail Merge** button on the **Mailings** tab and select **E-Mail Messages**:



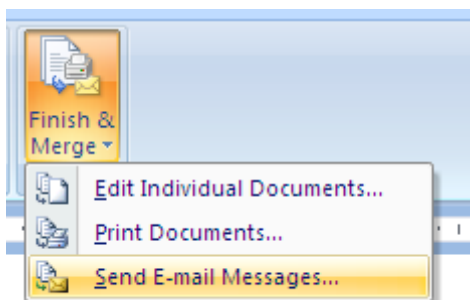
2. Select your list containing the field names you want to use from **Select Recipients**. If you choose **Outlook Contacts**, the fields will be imported into a temporary database file:



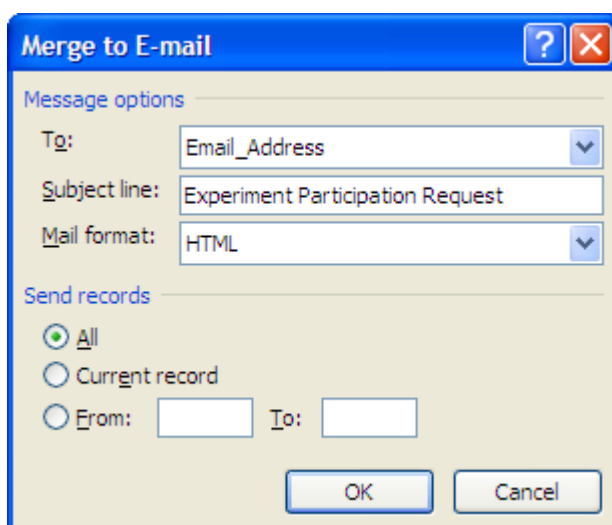
- Click on the **Insert Merge Fields** button to insert the fields that you want to use in your email:



- Click on the **Preview Results** button to preview the layout and field content
- If happy with layout, then click on **Finish & Merge** and select **Send e-Mail Messages**:



- You should then see the following dialogue:



The email address field (called **Email_Address** if using Outlook Contacts) should be selected in the **To:** field. If not, use the drop-down arrow to select the name of the field that contains email addresses from your database.

Type in a **Subject line:** as required.

If you're sure all is correct, click on **OK** to send email messages to all recipients. **Once you click OK, email messages will be sent out!**

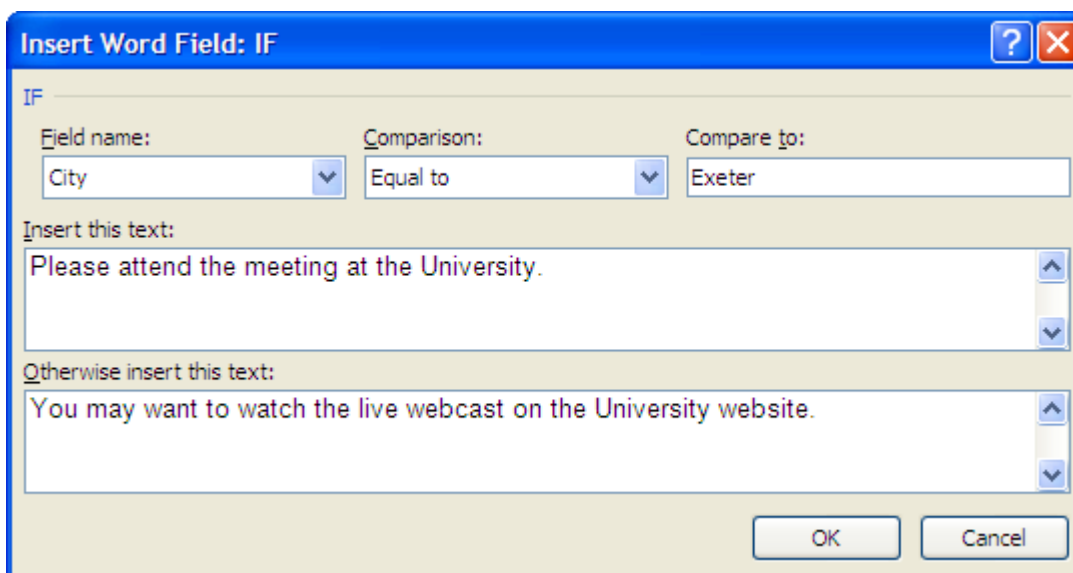
A copy of each email will be saved in your **Sent** folder in **Outlook**

Using Rules in Mail Merge

If...Then...Else

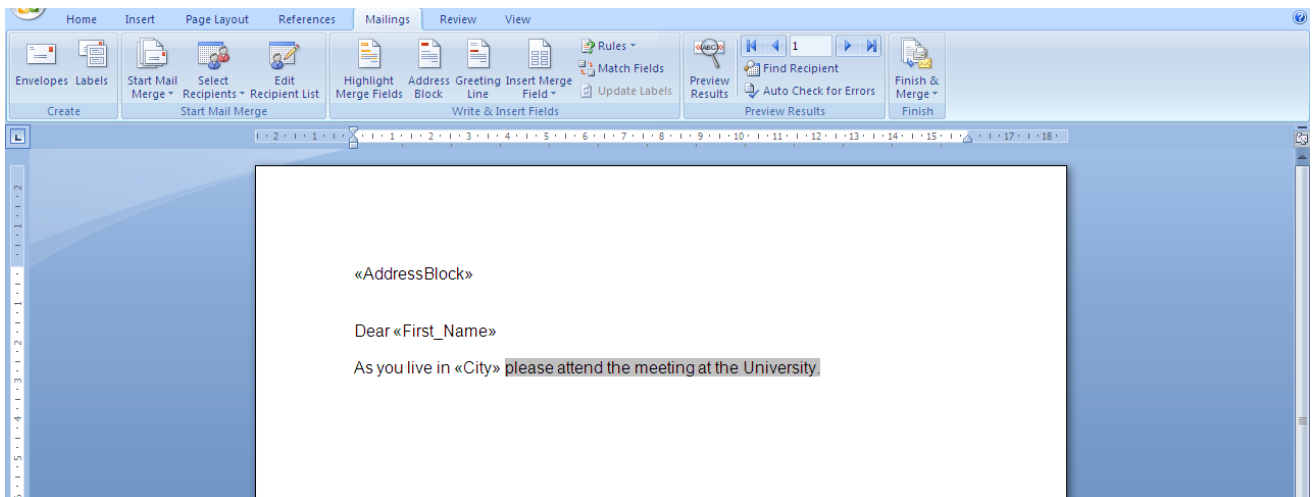
The If...Then...Else Rule will allow you to have two different pieces of text inserted into your letter dependent on the criteria that you specify. For example, if you want to send everyone who lives in Exeter one paragraph, and everyone else another.

1. Position your cursor at the point where you want to insert your text.
2. Click on Mailings, Rules, If...Then...Else
3. Select the Field name you want to use for your criteria eg City
4. Select our Comparison: eg Equal to
5. Select what you want to compare to: eg Exeter

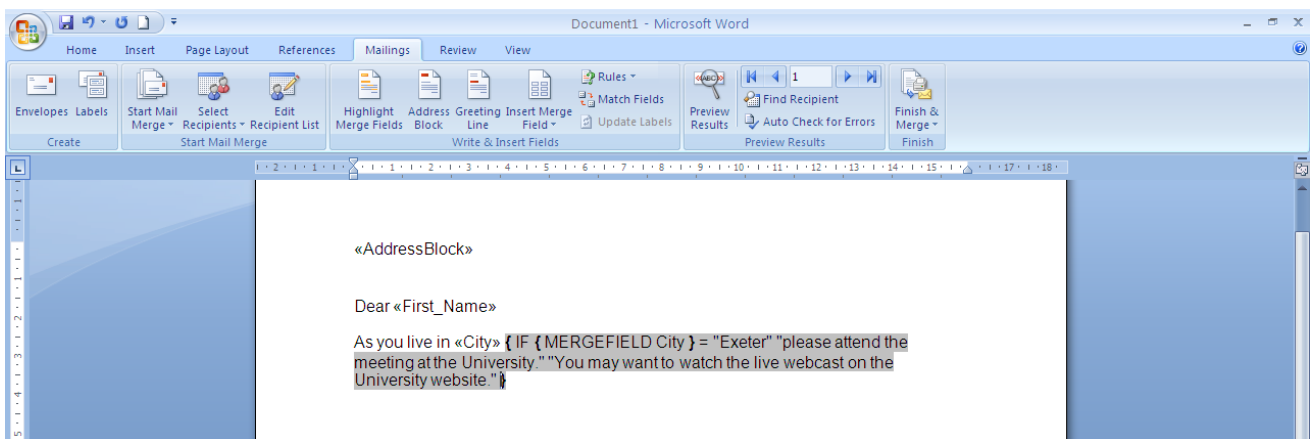


6. Type in the text which you want everyone to receive who matches your criteria (ie who's City is Equal to Exeter) in the *Insert this text:* box
7. Then type in the text everyone else is to receive in the *Otherwise insert this text:* box

When you click on OK you will see the result in your letter:



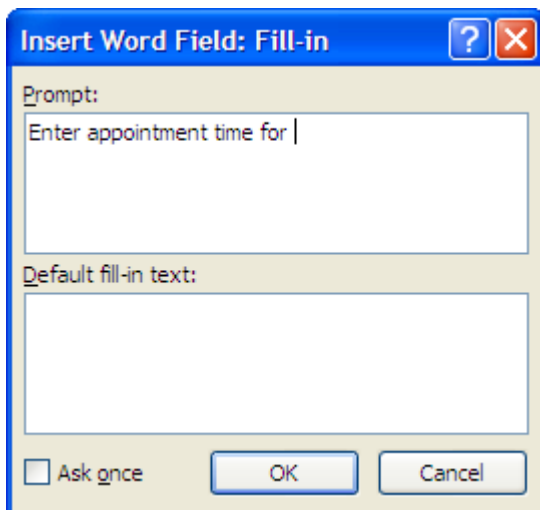
This will only show you the result for the first record. To edit the rule, you need to view the Field Codes by either right-click and select Toggle Field Codes or <Alt> + <F9> via keyboard to see all field codes:



Fill-in Fields

You can use Fill-in field codes to insert variable text for each letter. Word will stop at each letter and allow to type in your response. You would use these if you did not have a field in your database containing this information (and you didn't want or need this information to be stored) or if it is different every time.

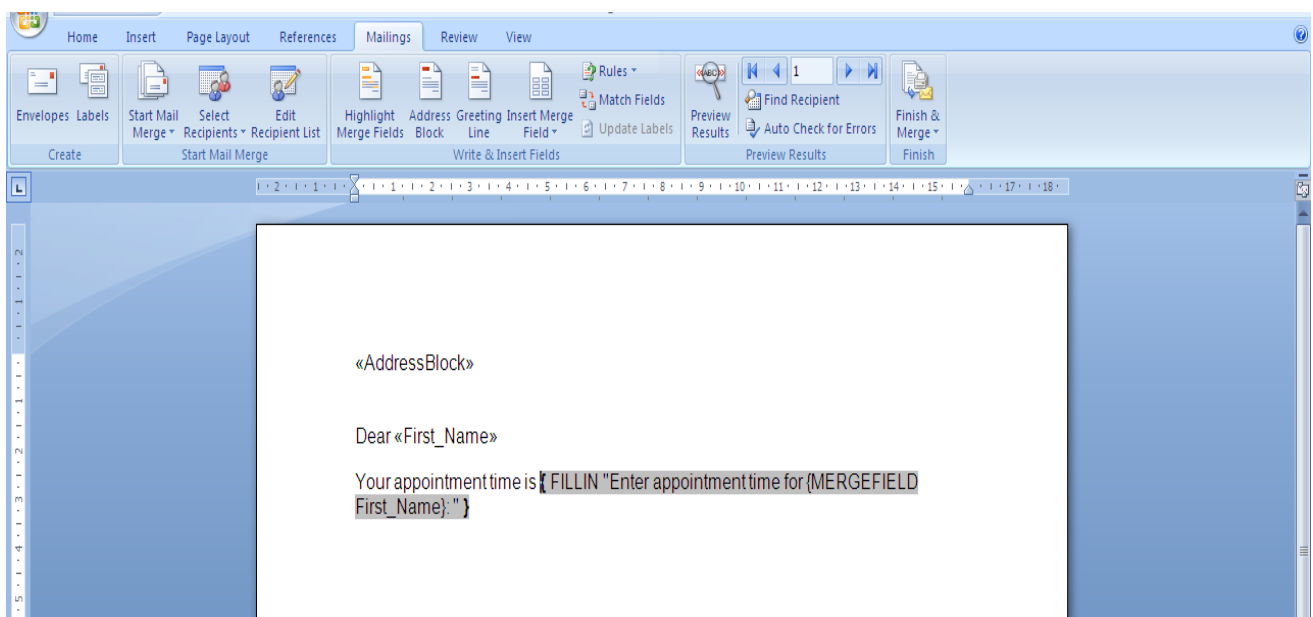
1. Click into the merge letter at the point where you want to type in the variable text:
2. Select Mailings, Rules, Fill-in...



Tick **Ask once** if you want the same text to go into each letter

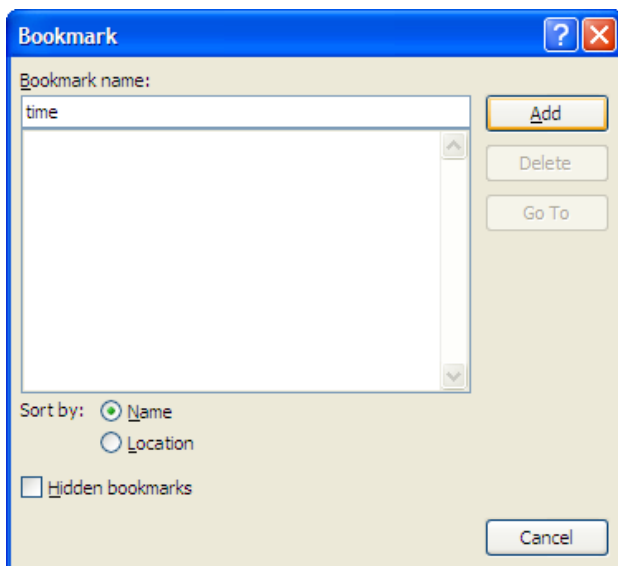
3. You will need to edit the merge field code to include the name of your recipient as you can't see who you are sending the letter to! It would look something like this:

{FILLIN "Enter appointment time for {MERGEFIELD First_Name}:"}

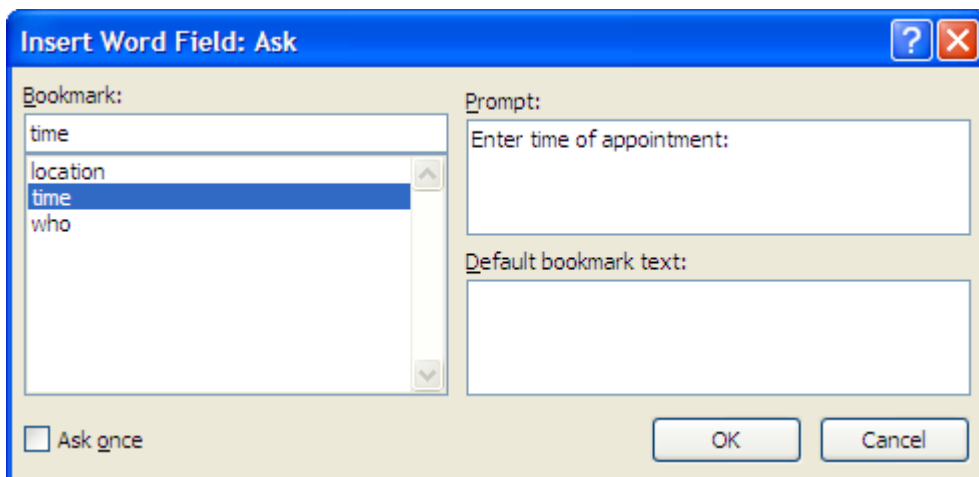


The Ask Field

The Ask field is similar to Fill-in, but allows multiple variable text in each record. You will have to create a **Bookmark** (**Insert** tab, **Bookmark** at the point where you want your entry) at each point in the merge letter where you would like to enter the data:

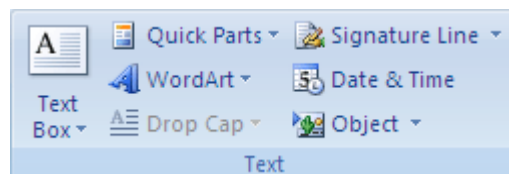


When you have the Bookmarks in place, Click on Rules, Ask...and select the first bookmark, enter your prompt for each bookmark:

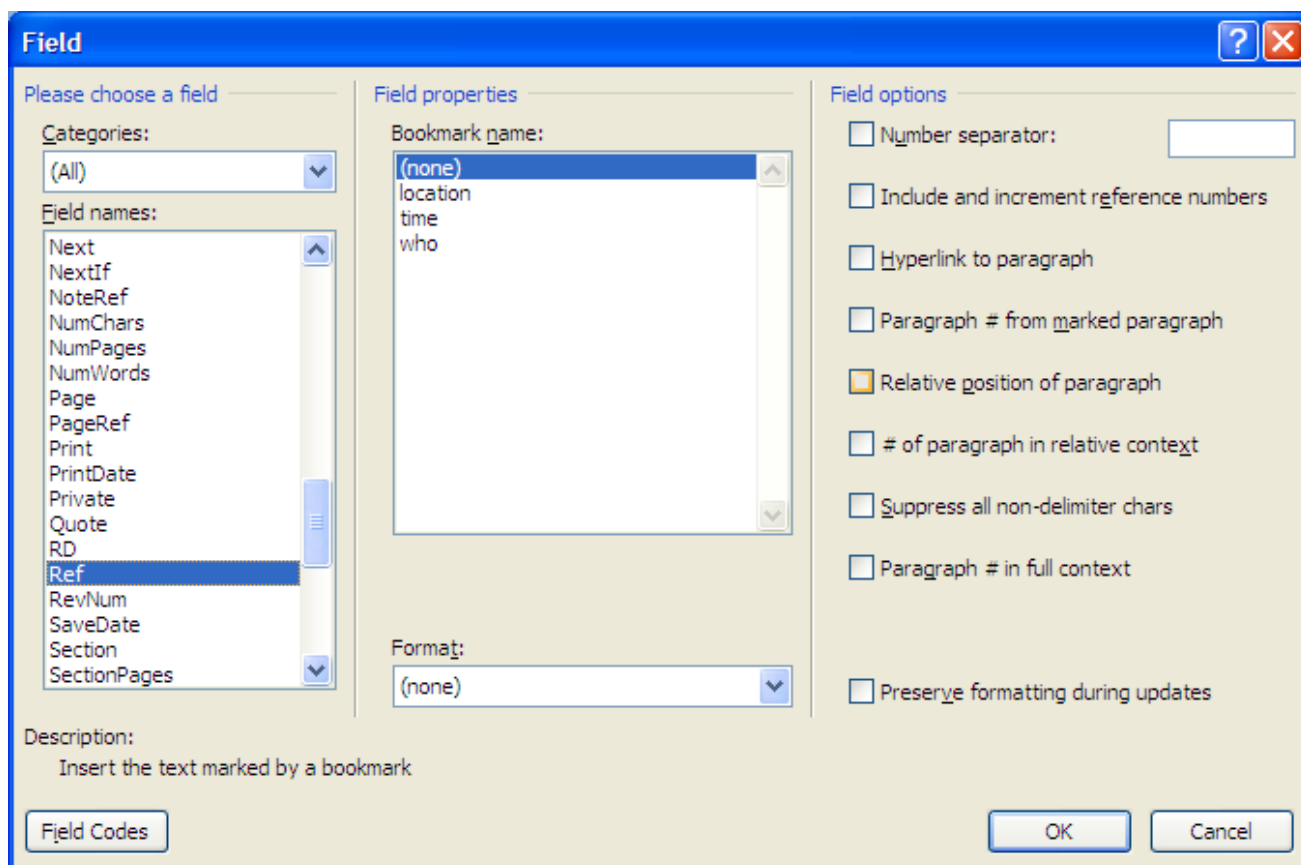


You will then have to insert a **Ref** field after the **Ask** field to display the bookmark contents:

1. Place the insertion point in the document after the ASK field.



2. On the **Insert** tab, in the **Text** group, click **Quick Parts**, and then click **Field**.
3. In the **Field names** list, select **Ref**.
4. In the **Bookmark name** list, select the name of the bookmark that is defined in the ASK field:



5. Click **OK**.

The result would look something like this (remember to press <Alt>+<F9> to view the codes):

Your appointment time is {ASK time “Enter time of appointment for: {MERGEFIELD First_Name} {REF time}. Please go to {ASK location “Enter location”} {REF location} and report to {ASK who “Enter name of person to report to “}{REF who}.

NB: In the example above, the addition of {MERGEFIELD First_Name} is used to display the recipient name (as with the Fill-In option) as each letter won’t be visible when entering the information for the ASK field. You will need to edit the code after inserting the ASK field.