Mail Merge
Word

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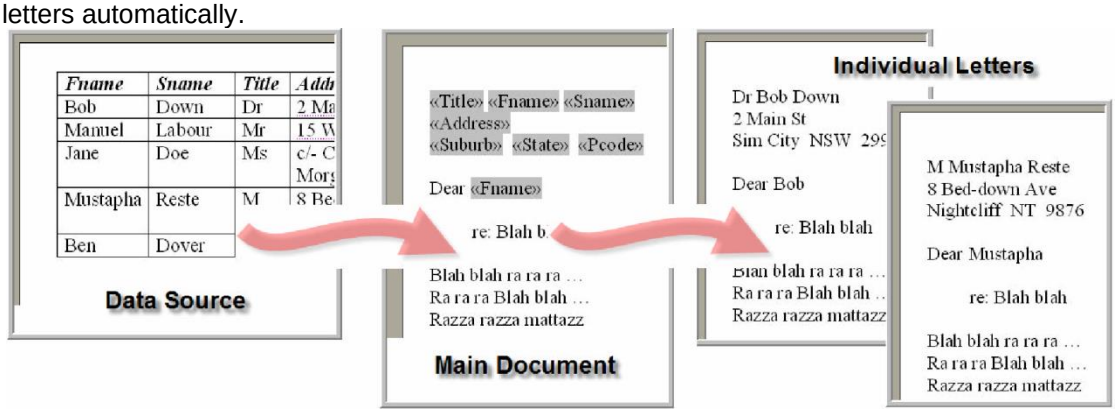
WHAT IS MAIL MERGE?

Have you ever had to send several letters that were similar (if not identical) to several people? If so, you probably created one letter, printed it, then changed the address and other details, printed this version, and so on until you had your batch of documents for mailing.
Mail merge is a way of bringing together your one letter and a list of mail recipients to create all the individual letters automatically.



You use mail merge when you want to create a set of documents that are essentially the same but where each document contains unique elements. For example, in a letter that announces a new product, your company logo and the text about the product will appear in each letter, and the address and greeting line will be different in each letter.

Using mail merge, you can create:

- A set of labels or envelopes: The return address is the same on all the labels or envelopes, but the destination address is unique on each one.
- A set of form letters, e-mail messages, or faxes: The basic content is the same in all the letters, messages, or faxes, but each contains information that is specific to the individual recipient, such as name, address, or some other piece of personal data.
- A set of numbered coupons: The coupons are identical except that each contains a unique number.

Creating each letter, message, fax, label, envelope, or coupon individually would take hours. That's where mail merge comes in. Using mail merge, all you have to do is create one document that contains the information that is the same in each version. Then you just add some placeholders for the information that is unique to each version. Word takes care of the rest.

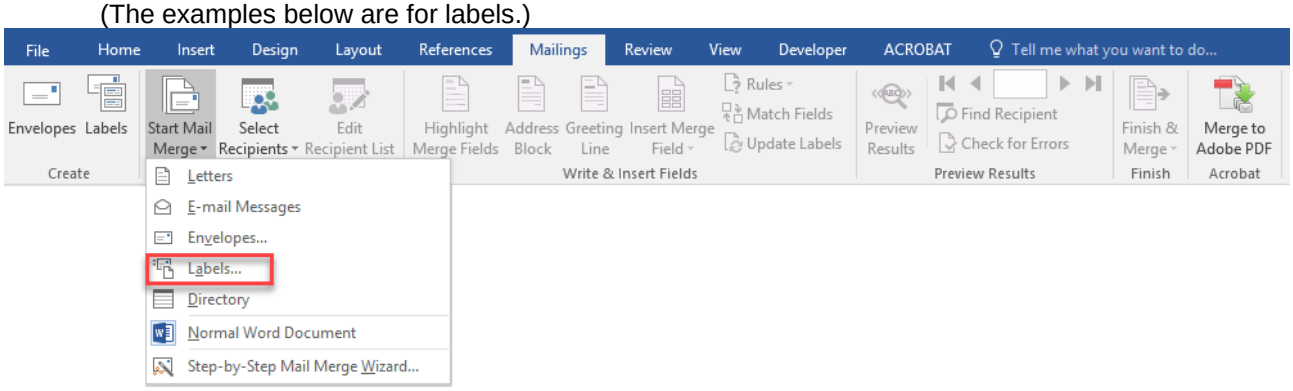
Steps in Creating a Merge

Whatever type of document you intend to produce, you need to execute these steps:

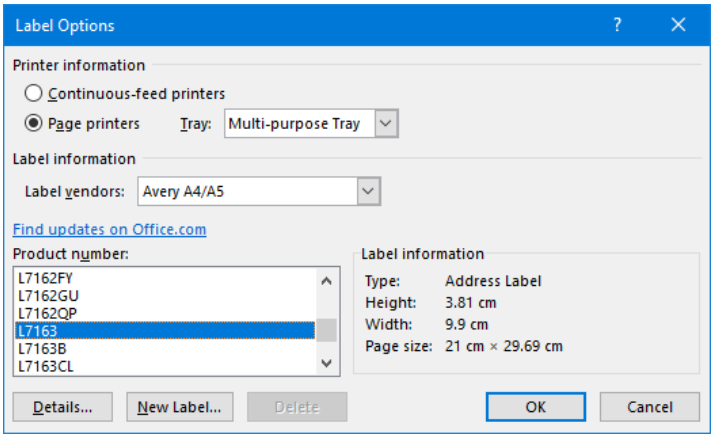
- Develop the main document with any required standard text
- Create or access some source of data – the merge list – and link it to the main document
- Insert merge fields in the main document
- Merge the two documents to a new (third) document or to a printer

START THE MAIL MERGE PROCESS

1. Start Word. A blank document opens by default. Leave it open. If you close it, the next step won't work
2. Click the Mailings tab
   (If you want assistance in producing your merge choose the Step by step Mail Merge wizard. This will open a task pane on the right. By using hyperlinks in the bottom of the task pane, you can navigate through the mail-merge process.)
3. Click Start Mail Merge button
4. The Mail Merge options window will drop down. Select the type of merge you want to do.
   (The examples below are for labels.)



5. The Label options window will open.



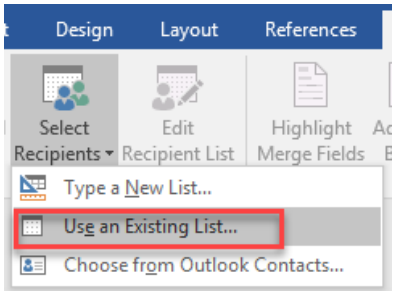
You need to choose a specific type of label by Label products and Product number. Click Next at the bottom of the task pane.
Note: The type of label is either on the front or back of the label box or a sheet inside. For a EXP 14 label sheet you would use Avery A4/A5 and L7163.

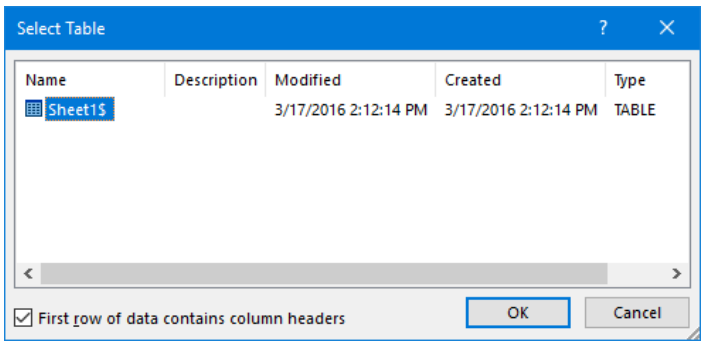
If you don't have the product code you can create a new label. Refer to Create Custom Labels section

Connect to the data file

In this step you need to connect to the data file that you want to merge into your documents.
Click on select recipients and choose an option from the list.

If you have an Excel, Word or Access file that contains your information, click Use existing list, and then click Browse to locate the file on your computer, then choose what sheet you have the data in.





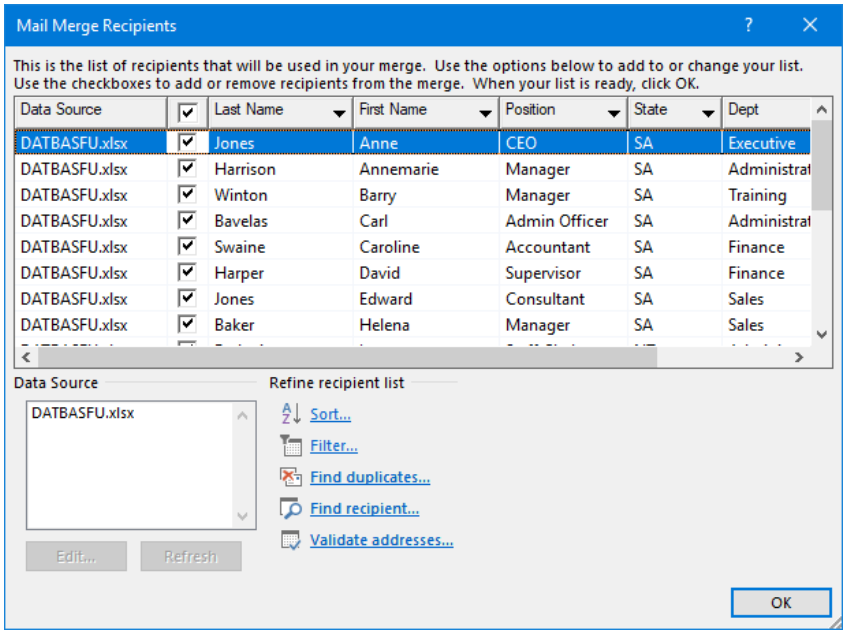
If you don't have a data file yet, click Type new list, and then use the form to create your list. The list is saved as a mailing database (.mdb) file that you can reuse.

Note: If you're creating merged e-mail messages or faxes, make sure that your data file includes a column for the e-mail address or fax number. You will need that column later in the process.

Choose the records in the data file that you want to use

Just because you connect to a certain data file doesn't mean that you have to merge information from all the records (rows) in that data file into your main document.

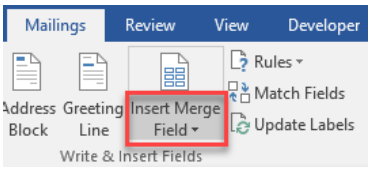
After you connect to the data file that you want to use, select the Edit Recipients list. A dialog box opens where you can select a subset of records for your mail merge by sorting or filtering the list.



Do any of the following:

- To sort the records in a column in ascending or descending order, click the column heading.
- To filter the list, click the arrow beside the column heading that contains the value on which you want to filter. Then, click the value that you want. Or, if your list is long, click (Advanced) to open a dialog box where you can set the value. Click (Blanks) to display only records that contain no information or (Nonblanks) to display only records that contain information.
  After you filter the list, you can display all the records again by clicking the arrow and then clicking (All).
- Clear the check box next to a record to exclude that record.
- Use the buttons to select or exclude all the records or to find specific records.
- If you created the data file as part of the mail-merge process, the Edit button is available in this dialog box. You can make changes to the records if you want to update the file.
- After you choose the records that you want, you're ready to Add the fields to your document.

Add fields



If the main document is still blank, type the information that you want to appear in each copy or label. Then, add your data fields by clicking Insert Merge Fields. This will add fields that match any of the columns in your data file. For example, your data file might have a column called First Name.

Fields are placeholders that you insert into the main document at locations where you want unique information to appear. For example, you can click the Address block or Greeting line links in the task pane to add fields near the top of a new product letter, so that each recipient's letter contains a personalised address and greeting. Fields appear in your document within chevrons, for example.

«PREFERRED_NAME»·«SURNAME»¶
«CLEVEL2_DESC»¶
«CLEVEL5_DESC»¶
¤

«Next·Record»«PREFERRED_NAME»·
«SURNAME»¶
«CLEVEL2_DESC»¶
«CLEVEL5_DESC»¶
¤

Once you have formatted your label and added the fields, you then need to click the Update Labels button. This will update all the labels in the page and place Next Record in front of each label.

Sometimes you need to change the way a field displays. Eg. American date to Australian date.

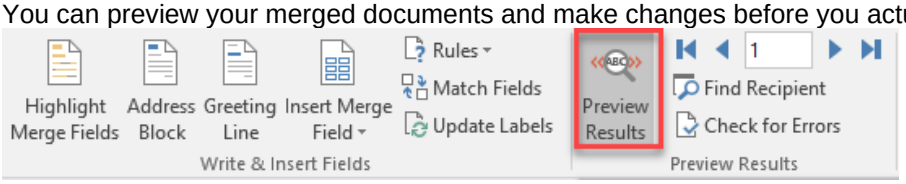
- Click on the date you want to change, then press Alt + F9 on the keyboard. This will display all the merge codes. You then need to change the code to the correct format. Presuming your original table field is called 'Date', the merge field will currently be **{** MERGEFIELD Date **}**. You need to add the following formatting data: \@"dd MMMM yyyy"
  Your field will now look like this **{** MERGEFIELD Date \@"dd MMMM yyyy"**}**. This will format the date as 02 January 2017. If you want / or - place them instead of the space and the following rules apply for the format of the date.
  d - single number (2), dd - duel number (02)
  MM - number format (02), MMM - 3 letter name format (FEB), MMMM - as the full name (February)
  yy - 2 number format (17), yyyy - 4 number format (2017).

- Press Alt + F9 again to revert to the field name view then continue the merge.
- For decimal points or $ formatting change the field as above to { MERGEFIELD "Price" \# $#,###.00}

For more field variations, do a search on the internet for format merge fields in Word.

Preview the merge

You can preview your merged documents and make changes before you actually complete the merge.

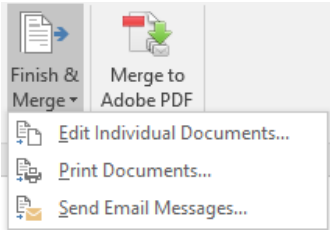


To preview, do any of the following:

- Page through each merged document by using the next and previous .
- Preview a specific document by clicking Find a recipient.
- Click Edit recipient list to open the Mail Merge Recipients dialog box, where you can filter the list if you see records that you don't want to include.
- Click the Preview Results button to toggle back to the Merge fields to make other changes.
- When you are satisfied with the merge results, click Finish & Merge.

Complete the merge

What you do now depends on what type of document you're creating. If you are merging letters, you can print the letters or edit them individually. If you choose to edit them, Word opens the document to a new window.



No matter what type of document you are creating, you can print, transmit, or save all or just a subset of the documents.

If you're creating merged e-mail messages, Word sends the messages immediately after you complete the merge. Therefore, after you choose which messages you want to send, you are prompted to indicate the column in your data file where Word can find e-mail addresses for the recipients. You also are prompted to type a subject line for the message.

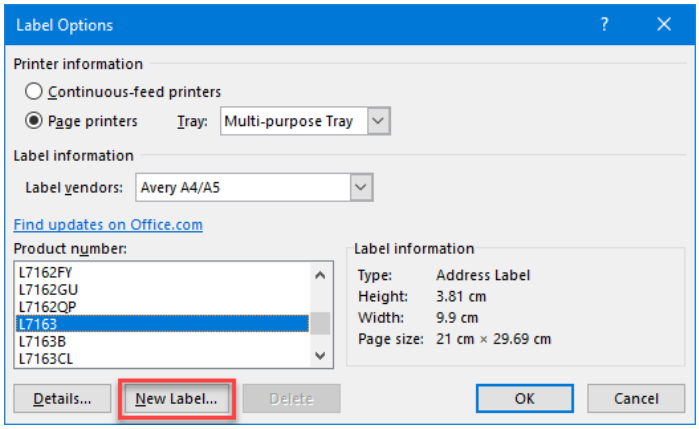
Remember that merged documents that you save are separate from the main document. It's a good idea to save the main document itself if you plan to use it for another mail merge.
When you save the main document, in addition to its content and fields, you also save its connection to the data file. The next time you open the main document, you're prompted to choose whether you want the information from the data file to be merged again into the main document.

If you click Yes, the document opens with information from the first record merged in

If you click No, the connection between the main document and the data file is broken. The main document becomes a standard Word document. Fields are replaced with the unique information from the first record.

CREATING CUSTOM LABELS

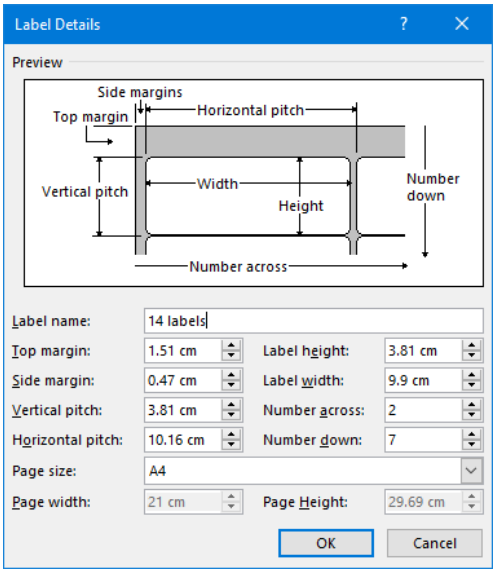
When you select Label options..., the following dialog box will appear.



You need to choose a specific type of label by Label products and Product number. Click Next at the bottom of the task pane.

Note: The type of label is either on the front or back of the label box or a sheet inside. Eg. a 14 label sheet could be Avery A4/A5 and L7163.

If you don't have the product code you can create a new label. Click on New Label and enter a name for the Label. Using a ruler, measure the distances in cm of the label sheet you want to use. Take note of the diagram below of what to measure. Once you have entered the details click OK. If one of the measurements doesn't fit to the page a error message may come up.



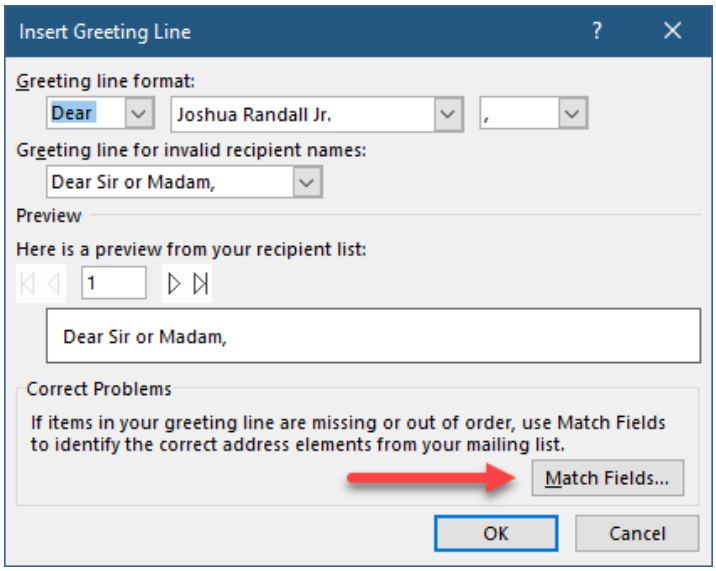
CREATING MERGE LETTERS

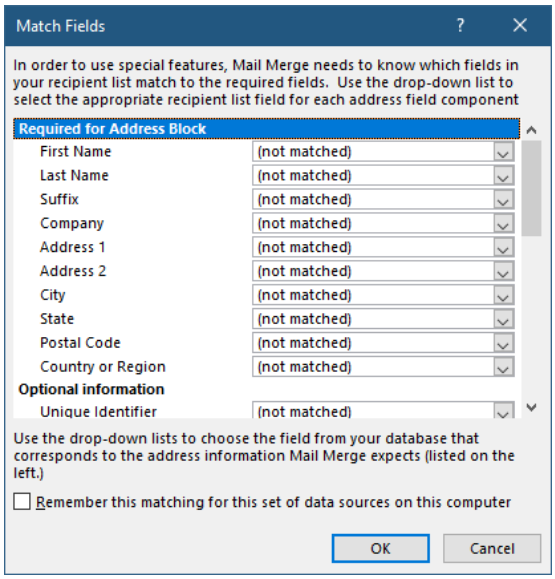
Creating letters is the same as doing labels. The main document is the one that contains the text or any other content that you want to appear in the resulting individual documents. It should also contain merge fields that act as placeholders and indicate what data items will appear where. You cannot insert these fields until you have attached a data source.
It is possible to use an existing document as the main document, or you can create one from scratch.

1. Choose the letter option.
2. Next connect to the data file as done previously.
3. Insert the fields and information into the letter. You have various options. To achieve these, you may have to match the fields from your data to the Word option. Select Match field button in the below options.
    - Address block
    - Greeting line
4. Then complete the merge as previously done.

MATCHING FIELDS

If you insert an address block field or a greeting line field into your document, you are prompted to choose the format that you prefer. For example, the illustration shows the Greeting Line dialog box that opens when you click Greeting line. You use the lists under Greeting line format to make your choices.





If Word can't match each greeting or address element with a column from your data file, the addresses and greeting lines will not be merged correctly. To help avoid problems, click Match Fields. The Match Fields dialog box opens.

The elements of an address and greeting are listed on the left. Column headings from your data file are listed on the right.

Word searches your data columns that matches each element based on pre-selected words.
By using the lists on the right, you can select the column from your data file that matches the element on the left. It's okay if some fields aren't matched because they may not be relevant in the documents that you are creating.