Planning a mail merge

*The **Mail merge** helps you to send a number of copies of a document to recipients whose names are stored in a data file.*

- Two files are used in this procedure:
  - A **main document** containing the permanent text and the fields which act as links to the data source file;
  - A **data source** file containing the variable information.
- A data source file comprises **fields** and **records**. For example:

First name	Surname	Address	Post code	City
Michael	GEHRY	523 Pine St	98144	SEATTLE
Douglas	SMITH	55 122nd St	98144	SEATTLE

Each line of information, concerning GEHRY or SMITH, is a record.

Each type of information (First name, Surname…) is a field.

- Create the main document.
- Link the data file to the main document.
- Insert the fields from the data file at the appropriate places in the main document.
- Start the mail merge.

Creating a mail merge

Defining the main document

- To use a new document as the main document, use the shortcut key Ctrl **N**.
  To use a predefined template as the main document, click the **File** tab, then click **New**. Click the **Sample Templates** button then double click the **Merge Letter** template to use.

  *To use a one of your custom templates, click the **My templates** button and double-click the template you want to use.*

  If you want to use an existing document, open that document. It can be an ordinary document or a main document created during a previous mail merge.
- Click the **Mailings** tab.
- Go to the **Start Mail Merge** group and click the button of the same name. Click either **Letters** or **E-Mail Messages**, according to the type of main document you are using.

  *With the **E-Mail Messages** option, you can send custom e-mails to recipients in your address list. To use this function, Outlook 2010 must be installed on your PC.*

Linking a data file to the main document

- In the **Mailings** tab, go to the **Start Mail Merge** group, press the **Select Recipients** button and select one of the following options:
  Type New List...: to enter the contents of a new recipients list (cf. Creating a list of data in this chapter).

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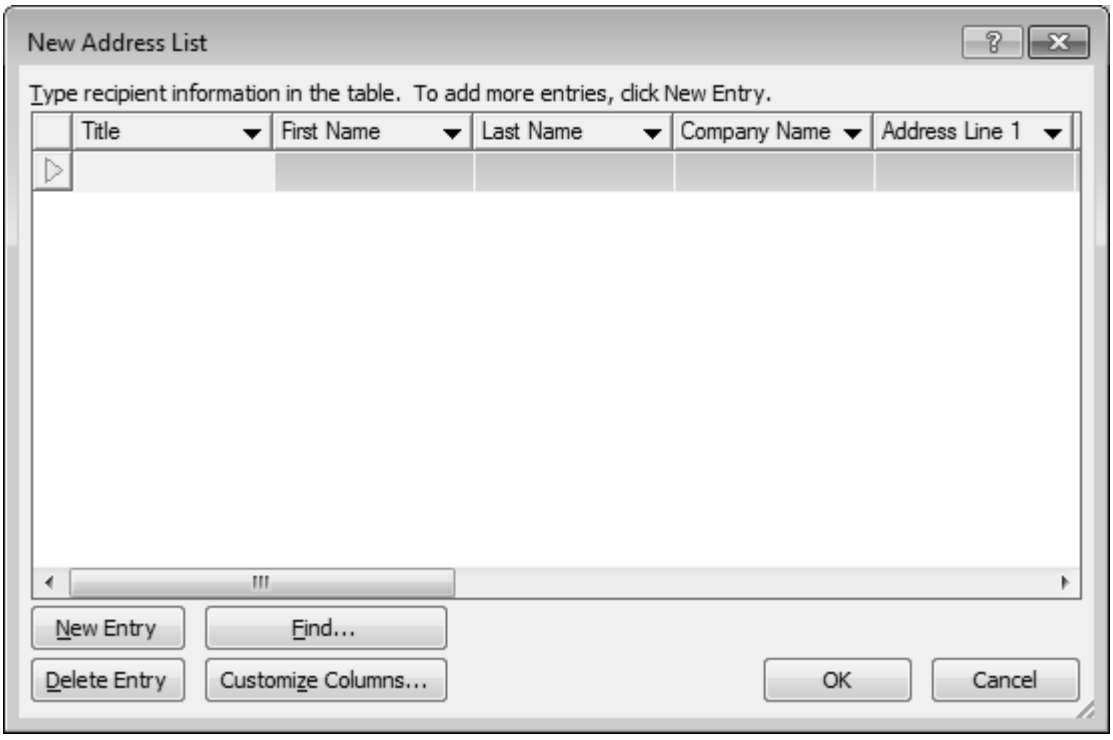
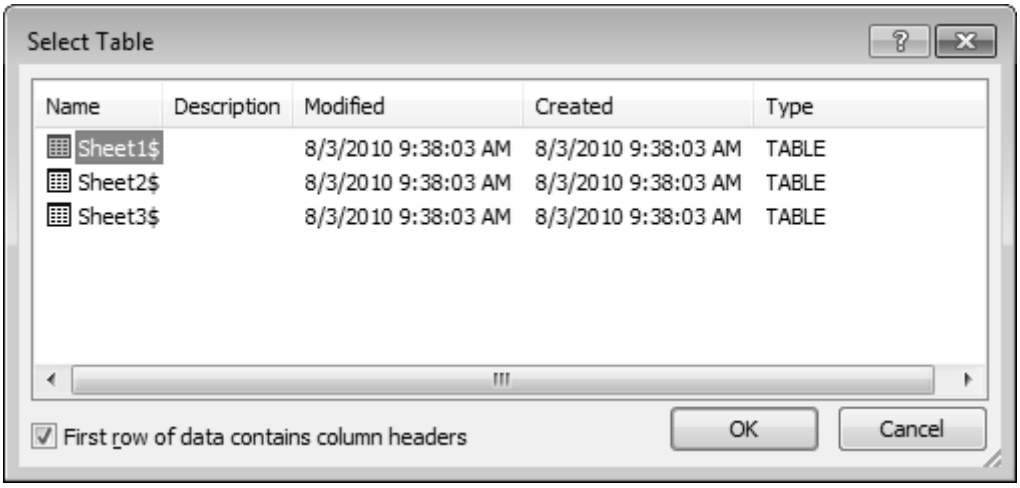
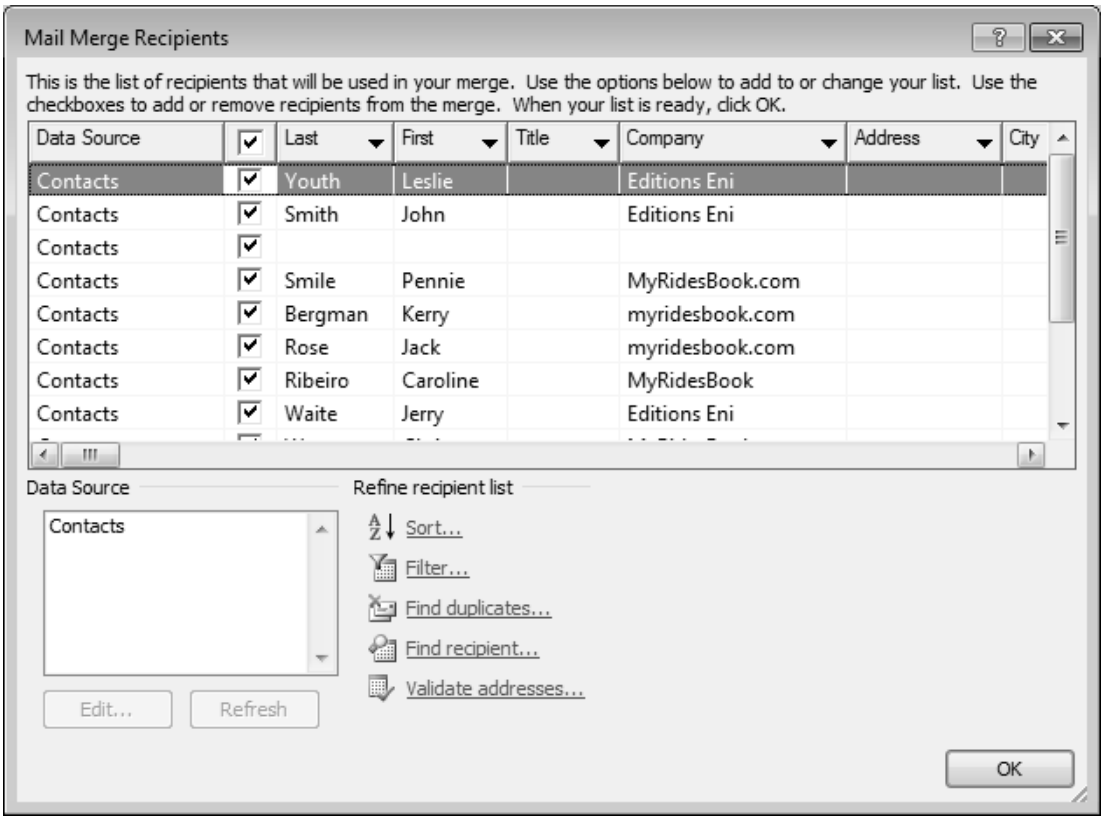


Use Existing List...: opens the **Select Data Source** dialogue box from which you can select a file or database containing the list of recipients. If the selected list is not what you were looking for, simply select a different list by clicking the same option again.

If your selected list of data is an Excel workbook (.xls) or an Access database (.accdb), Word opens a dialogue box when it opens the file so you can choose which worksheet or which table in the database you want to use for the mailing.



Select from Outlook Contacts...: opens the Select **Contacts** dialogue box, from which you can select the list of recipients from your Outlook contacts folder.

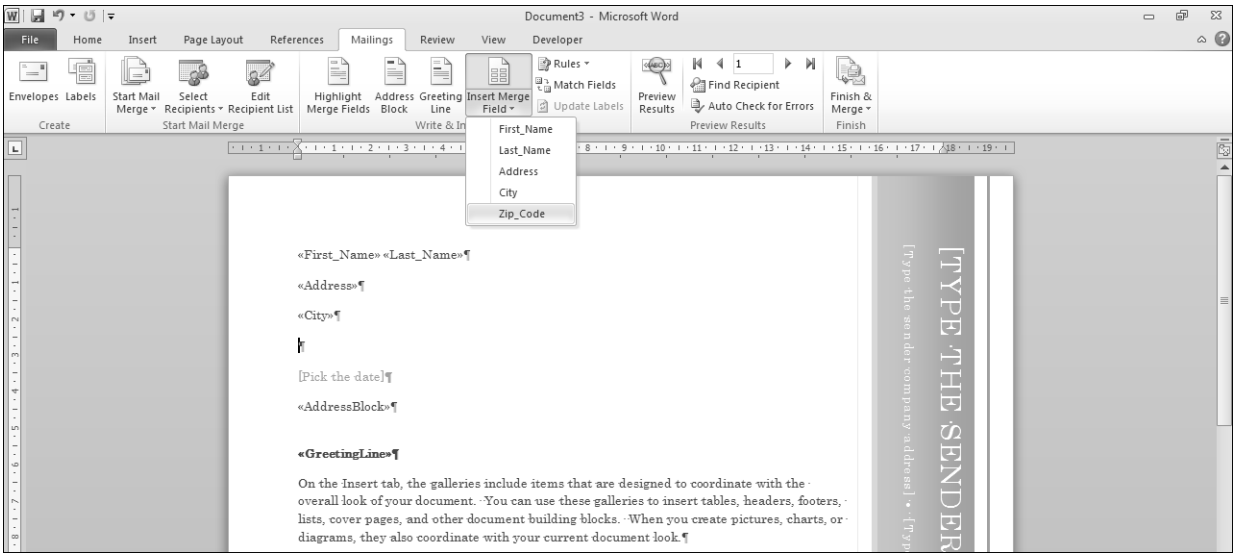


*As a list of data is now linked to the main document, most options in the **Mailings** tab are now available.*

If you only want one list of data to be associated with the main document, go to the **Mailings** tab, click the **Start Mail Merge** button (from the group of the same name), then click **Normal Word Document**. This action will result in the other options in the list being greyed-out since the document is no longer a main document, but rather a normal Word document.

Adding mail merge fields to the main document

- Enter the contents of the main document (fixed text).
- Make sure that the **Mailings** tab is active.
- Place the cursor where the contents of the first field should be printed (for example, the recipient's name).
- To insert a field, open the list linked to the **Insert Merge Field** button (**Write & Insert Fields** group). Then click the name of the field to insert.



*The **Zip Code** field is going to be added at the cursor, under the **City** field. Each added field is enclosed in merge field characters « » to distinguish it from text.*

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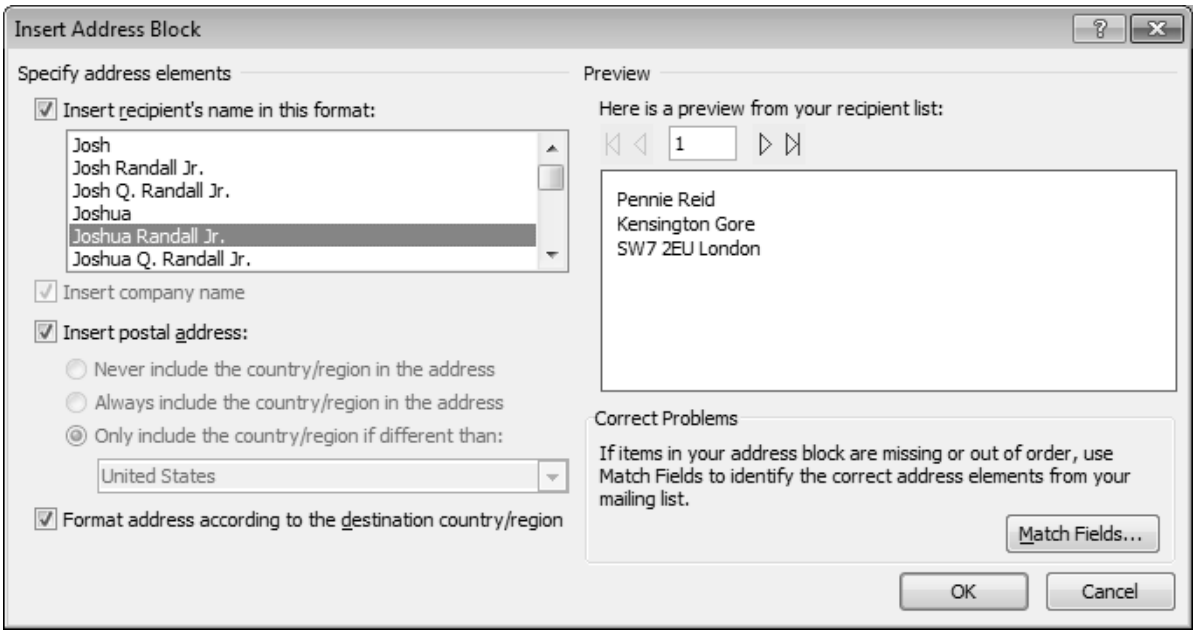
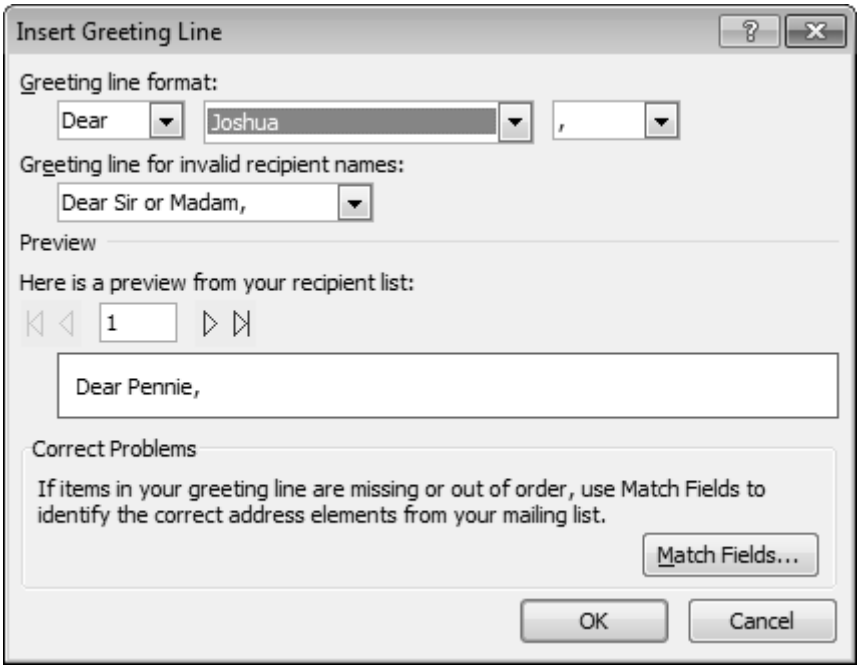
- To add the **Address Block** field (combination of several addresses from your recipient list), go to the **Write & Insert Fields** group and click the **Address Block** button.
  Under **Specify address elements**, define the contents of the address block.



  If some items do not have an address, click the **Match Fields...** button to identify the correct address elements from your contact list.
  Click **OK**.
  The «AddressBlock» field appears at the cursor.

- To add a **Greeting Line**, go to the **Write & Insert Fields** group and click the **Greeting Line** button.
  To define the contents of this field, use the lists under **Greeting line format** area.



  If items in your greeting line are missing or out of order, use **Match Fields...** to identify the correct address elements from your contacts list.
  Click **OK**.

To highlight the fields you have added to your document, go to the **Mailings** tab, **Write & Insert Fields** group and click the **Highlight Merge Fields** button.

Checking the mail merge

It is useful to preview a mail merge in case you want to make any changes before proceeding with it.

- Make sure the **Mailings** tab is active.
- To display a preview of the mail merge results, go to the **Preview Results** group and click the **Preview Results** button.

  In the main document, you see a preview of the letter corresponding to the data list entries.
- Use the following buttons, from the **Preview Results** group, to display a preview of the other entries:

You can also enter the record number in the relevant field and press the ↵ key.

To see fields in the main document again, click the **Preview Results** button to deactivate it.

- To check for errors that might occur during the merge, go to the **Preview Results** group and click the **Check for Errors** button.

  Choose one of the three options from the **Checking and Reporting Errors** dialogue box, then click OK.

While previewing, you can **Find Recipient** from the recipient list by clicking the button of the same name in the **Preview Results** group (cf. Mailing – Managing the records in a data list).

Completing the mail merge

- In the **Mailings** tab, go to the **Finish** group, click the **Finish & Merge** button and choose one of the following options:

  Edit Individual Documents...: the merge takes place in a new document, with a page break inserted between each letter.

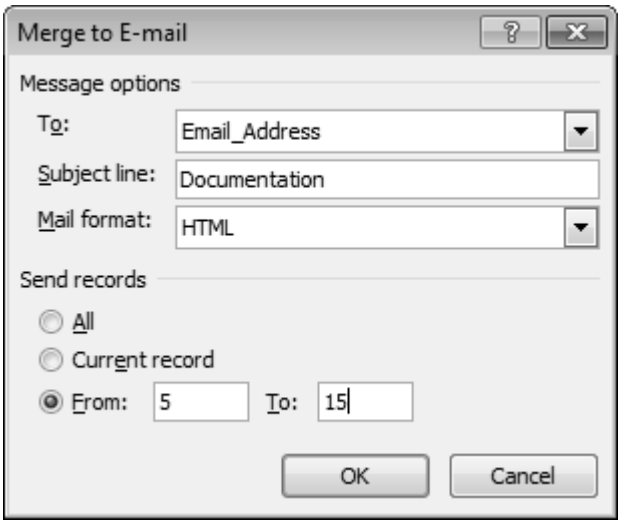
  Print Documents...: the merge is sent to the printer.

  Send E-mail Messages...: the merge allows you to send the document to recipients by e-mail.
- Specify which records should be merged:

  To merge all the records selected in the data list, select **All**.

  To merge the **Current record**, select the option with the same name.

  To restrict the merge to a number of elements selected in the data list, specify the number of the first record in the **From** list, and the last record in the **To** list.
- If it is an e-mail message merge, fill in the **Message options**.



To	Select the field against which the email addresses are stored.
Subject line	Select the message subject.
Mail format	Select either **Plain Text** or **HTML** to send the main document in the message body; select **Attachment** to send the document as an attachment.

*Unlike the **HTML** option, the **Plain Text** option does not permit formatting or graphics in messages.*

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- Click **OK** from the **Merge** dialogue box.
- If the merge was completed in a new document, you can either save or print it, then close it.
- Save the main document then close it.

  When you save the main document, you also save the link to the data list.

  *If changes have been made to the data list, Word prompts you to save them. In this case, click **Yes** to save the changes made to the main document.*

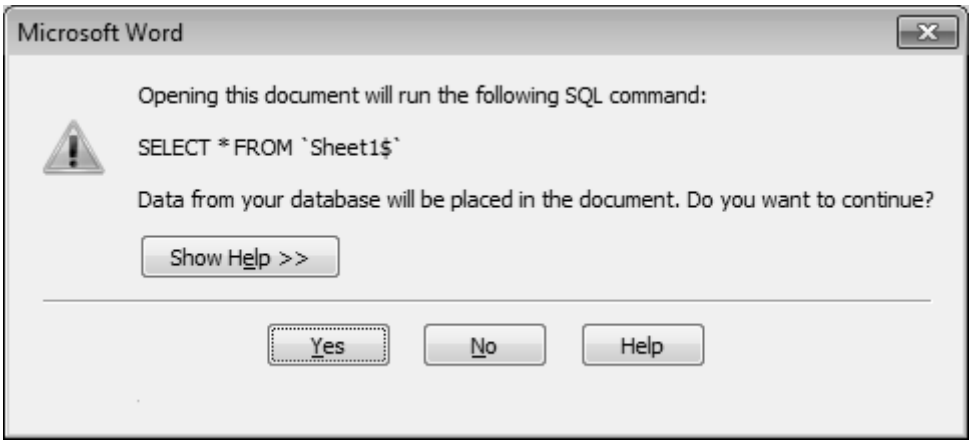
If you click the **Edit Recipients List...** button (**Start Mail Merge** group), the **Mail Merge Recipients** dialogue box opens, from which you can edit the contents or look of the data list.

To create a data list using the **Mail Merge Wizard**, go to the **Start Mail Merge** group (**Mailing** tabs), click the button of the same name, then follow the steps in the wizard to create your data list; you will find the same options as those explained above.

Opening a main document

- Click the **File** tab then **Open**.
- Select the folder where the main document is stored then double-click the file to open it.

  Word detects whether a data file is linked to the document you want to open, and prompts you to add the file data to the main document.



*The **Show Help** button displays the message text.*

- Click one of the following buttons:

  Yes to establish the link between the main document and data file.

  No to delete the link between the main document and the data file. The main document then becomes a normal word document.

  *If you choose to establish the link between this document and the data file, the options under the **Mailings** tab become available. These options are greyed out (i.e. not available) if you choose to delete the link.*

Creating a list of data

- If the main document already exists, open it. Otherwise, create a new document in which you enter the fixed text for the mailing.
- Make sure the main document is open in Word.
- In the **Mailings** tab, go to the **Start Mail Merge** group, click the **Select Recipients** button, then **Type New List...**.

  *The **New Address List** dialogue box appears displaying a list of predefined fields.*