MAIL MERGE –MAILINGS TAB

Mail merge is used to create a set of documents, such as a form letter or envelopes, that is sent to many customers or to create a sheet of labels. Each letter, envelope, or sheet of labels contains the same kind of information, but is also unique in that it is personalized for each customer. Mail merges can be created in Word by using the Mailings Tab Groups or the Mail Merge Wizard. This document will describe how to create a Mail Merge using the Mailings Tab.

START MAIL MERGE GROUP

This group is used to determine what type of document is going to be created, to select the recipients for the merge, and to edit the recipient list.

Start Mail Merge

The first step in creating a Mail Merge is to determine what type of document to create. To do this:

✞ Click the **Mailings Tab**.
✞ In the **Start Mail Merge Group**, click the **Start Mail Merge** button (see illustration below left).
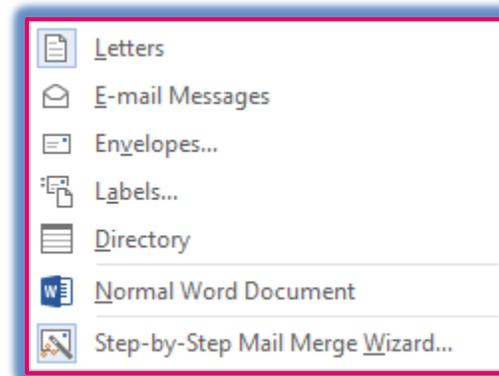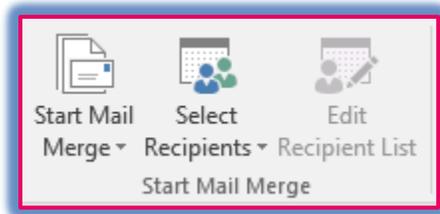
✞ A list of options for creating the merge will appear (see illustration above right).
✞ Choose one of the options from the list.
  ✶ **Letters** –This option can be used to create letters, memos, or other documents that require each item to be on one sheet of paper.
  ✶ **E-mail Messages** – To create an e-mail message that would be sent to several people, click this option. The messages can be sent from an Outlook Contact List or from some other data source that contains e-mail addresses.
  ✶ **Envelopes** – To create a group of envelopes that are personalized to several people, click this option. When this option is selected, an Envelope Options dialog box will display. This dialog box can be used to change the size and format of the envelopes.
  ✶ **Labels** – To create a group of labels that are addressed to several different people, click this option. When this option is selected, a Label Options dialog box will display. This dialog box can be used to select the size and format of the labels.
  ✶ **Directory** – When this option is selected, it is possible to create a list of the records that are in the data source that is used for the merge.
  ✶ **Normal Word Document** – Select this option to remove the merge fields from the document. The document will not be able to be used as a Merge Document unless all the codes are re-entered.

* **Step-by-Step Mail Merge Wizard** – Click this option to open the Mail Merge Wizard. This Wizard provides step-by-step instructions on completing a Mail Merge.
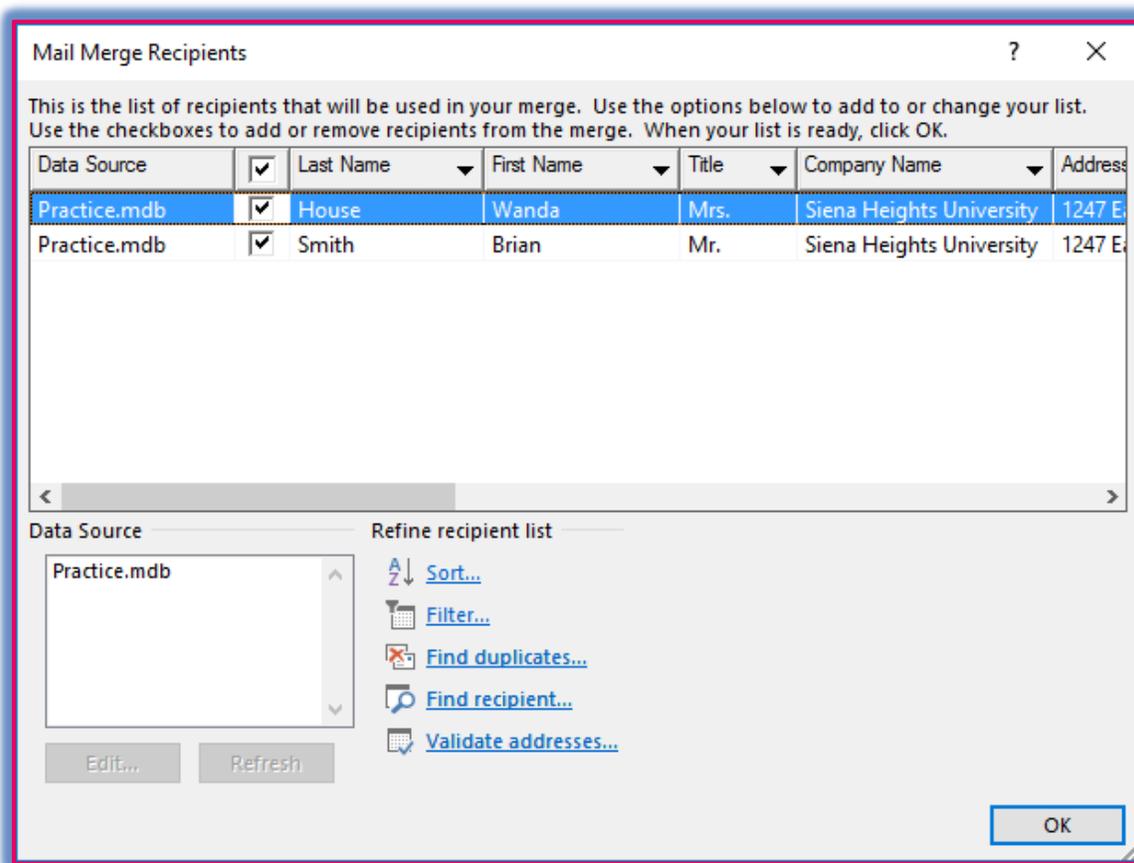
Select Recipients

The second step in this process is to create or select a Recipient List or Data Source. To do this:

✞ In the **Start Mail Merge Group**, click the **Select Recipients** button.

✞ Click one of the available options. These are:

* **Type New List** – Click this option to set up the list of fields for the recipient list. When this option is chosen, the New Address List dialog box will display. For information on creating a recipient list, see the Creating a Recipient List document under Mailings Tab on the Word Web page.

* **Use Existing List** – This option is used to select a previously created Recipient List. This list could be an Access database or an Excel Worksheet. When this option is chosen, the **Select Data Source** dialog box will appear.

* **Select from Outlook Contacts** – With this option, it is possible to select an Outlook Contacts List from which the information for the list will be selected.

Edit Recipient List

Once a list has been selected, this option is used to make changes to the list. The Mail Merge Recipients dialog box will appear (see illustration below). It is possible to make several changes to this list such as sorting and filtering.


✞ The name of the **Data Source** will appear in the **Data Source** window.

✞ Click the **Recipient List/Data Source** that is to be revised.

- ✞ Options for refining the **Recipient List** will display under **Refine Recipient List**.
  - ✶ **Sort** – When this link is selected, a dialog box will display with options for sorting the fields in the Recipient List. For more information on working with this item, see the Sorting and Filtering link in the Word Web page.
  - ✶ **Filter** – To filter the items in the list, click this link. A dialog box will appear with options for filtering the Recipient List. For more information on working with this item, see the Sorting and Filtering link in the Word Web page.
  - ✶ **Find Duplicates** – This option is used to locate any duplicate records within the Recipient List.
  - ✶ **Find Recipient** – To locate one of the entries in the Recipient List, click this link. A dialog box will appear asking for the name of the recipient.
  - ✶ **Validate Addresses** – This is a special add-on that needs to be installed on the machine.

WRITE AND INSERT FIELDS GROUP

In this group, it is possible to add field names and other merge features to the document that is being created.
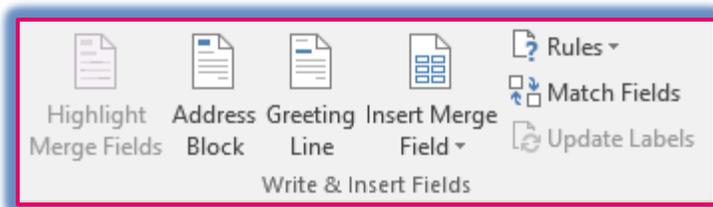

Highlight Merge Fields

After a field has been inserted into the document, clicking this button will highlight each of the fields. This provides a quick way to locate each of the fields in the document.

Address Block

When this button is clicked, a dialog box will open where there are options available to choose the format for the names. See the illustration on the next page for the options that are available in this dialog box.

- ✞ **Insert recipient's name in this format** - Click a format to use from the list.
- ✞ **Insert company name** – Click this option to deselect it if the company name is not to be included in the address block.
- ✞ **Insert postal address** – Choose from one of the three options listed below this area. These include:
  - ✶ Never include the country/region in the address.
  - ✶ Always include the country/region in the address.
  - ✶ Only include the country/region if different than ___. When this option is chosen, specify the country or region in the box below the option.
- ✞ **Match Fields** – If the fields in the recipient list are different than the default ones, this option allows you to match the fields with the default ones so that they will appear in the Address Block.
- ✞ **Preview** – On the right side of the **Insert Address Block** window, a preview of the entries in the Recipient List will display. Click the arrows to move from one entry to another.
- ✞ **Format Address According to the Destination Country/Region** – Click this check box if the address is to be changed to the format used by the country to which it is being sent.
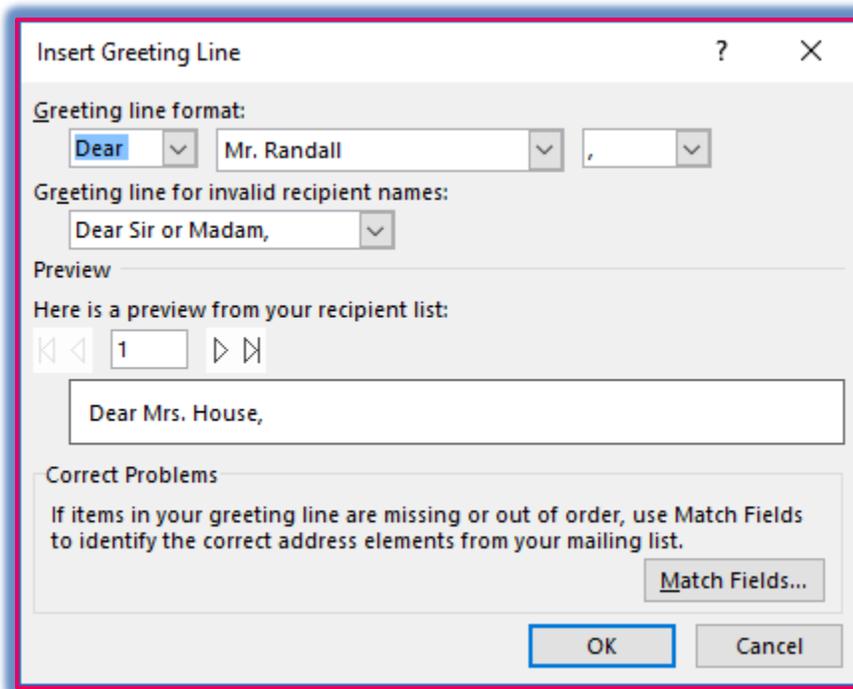
- ✛ Once all the options have been selected, click the **OK** button.
- ✛ The **Address Block** field will be inserted into the document at the location of the insertion point.
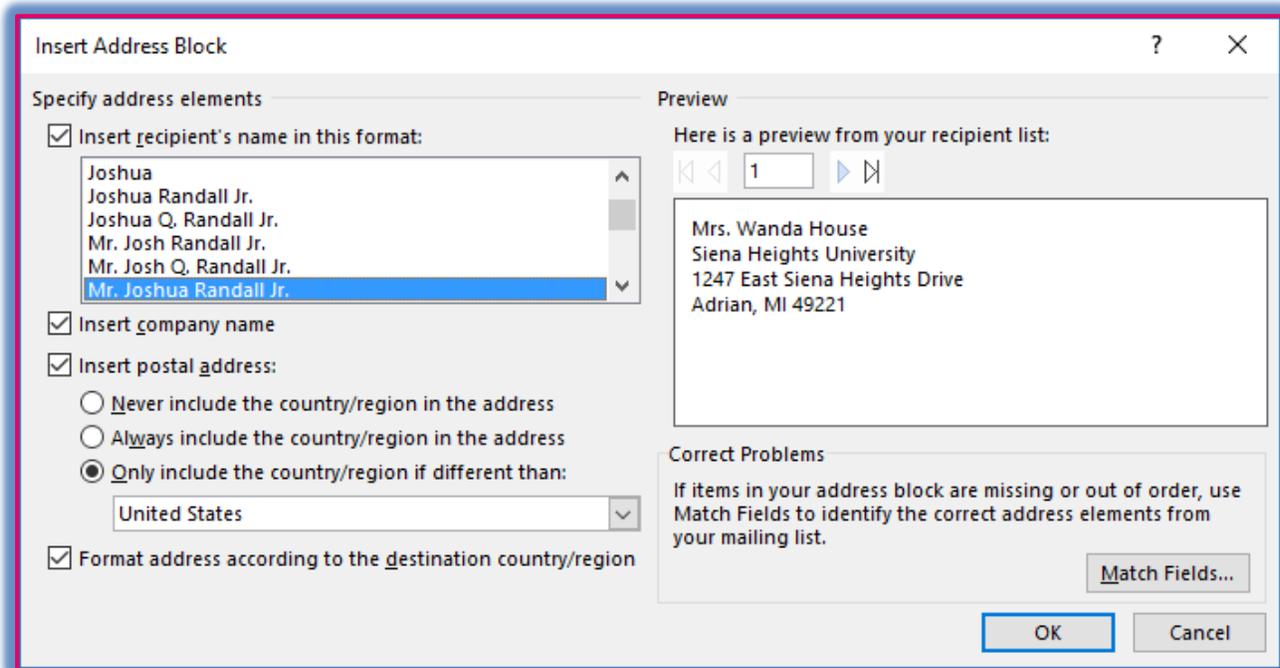
Greeting Line

This option is used to choose the format for the salutation in the document.

- ✛ The **Insert Greeting Line** dialog box will appear (see illustration below).

- ✛ Under **Greeting Line Format** in the first box, select from options such as Dear.
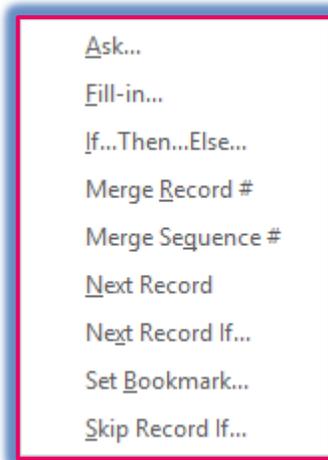
- In the second box on the same line, select the format for how the name will display in the letter.
- In the third box on the same line, choose the proper punctuation for the letter. The options are:
  - **Colon** – A colon is used at the end of a greeting line for a business letter.
  - **Comma** – Commas are used at the end of the greeting line in a personal letter.
- **Preview** – This area provides a preview of how the Greeting Line will appear in the letter. Use the arrows to move from one Recipient to another.
- **Match Fields** – If the fields in the recipient list are different than the default ones, this option allows you to match the fields with the default ones so that they will appear in the Address Block.

Insert Merge Field
- This option is used to insert individual fields into the document.
- When the button is clicked, a list of the fields in the recipient list will appear.
- To insert the field into the letter, envelope, or sheet of labels, click the field name.
- The field will be inserted at the place in the document where the insertion point is located.

Rules
- This button is used to insert special rules, such as If statements, into the merge document.
- A list of different rules will appear in the list (see illustration at right).
- Click any of the rules in the list.
- A dialog box will appear which corresponds to the rule that is being inserted.
- Fill in the appropriate information for each of the dialog boxes and then click **OK**.
- The rule will be inserted into the document at the place in the document where the insertion point was located.

Ask...
Fill-in...
If...Then...Else...
Merge Record #
Merge Sequence #
Next Record
Next Record If...
Set Bookmark...
Skip Record If...

Match Fields
- This button is used to specify which custom fields in the Recipient List should match the default fields in the Word program.
- When the button is clicked, a dialog box with a list of default fields will appear on the left.
- A group of drop down lists will appear on the right side of the dialog box.
- Click the drop down list and select the field from the Recipient List that should match the default field.
- When all the appropriate fields have been matched, click the **OK** button.

Update Labels
- This button is used to update all the labels in a Mail Merge Labels document.
- Once the information has been inserted into the first label, clicking this button will place the information into all the other labels.
- When labels are created a rule called Next Record will be inserted into all of the labels except the first one.

✞ Once the Update Fields button is clicked, the Address Block or other fields that were placed in the first label will appear in the rest of the labels along with the Next Record rule.

PREVIEW RESULTS GROUP

Once all the fields and other text have been placed in the Mail Merge document, this group is used to preview the results of the merge.

Preview Results

✞ This option will show what the Mail Merge document will look like when the merge is completed.
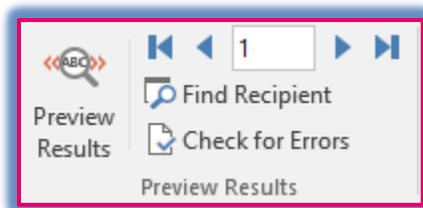
✞ To move from one record to another, click the arrows at the top of the **Preview Results Group**.
  ✶ The first arrow displays the first record in the Recipient List.
  ✶ The second arrow moves through the records in the Recipient List one record at a time.
  ✶ To locate a specific record:
    ✦ Highlight the number in the box.
    ✦ Input the number of the record to be located.
    ✦ Press the **Enter** key on the keyboard.
  ✶ To move to the next record in the Recipient List, click the third arrow.
  ✶ To move to the last record in the Recipient List, click the last arrow.

Find Recipient

✞ To locate a recipient in the **Recipient List**, click this button.
✞ The **Find in Field** dialog box will display (see illustration below left).
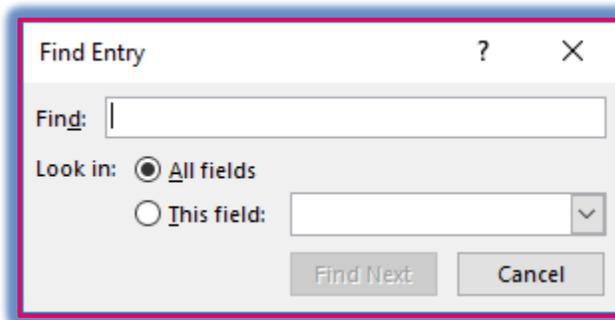
✞ In the **Find** box, input the value that is to be found.
✞ In the **This Field** list, click the field that is to be searched.
✞ Click the **Find Next** button to locate the record.

Check for Errors

This option is used to specify how errors will be handled if any appear during the merge. It is also possible to simulate the merge to see if there are any errors.

✞ When this button is clicked, the **Checking and Reporting Errors** dialog box will appear (see illustration below).

✞ Select one of the available options as shown in the illustration below.
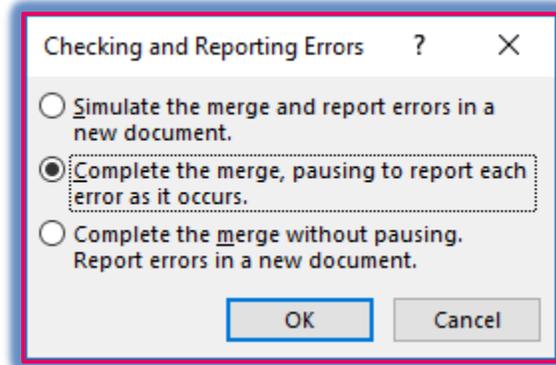
✞ When the desired option has been selected, click the **OK** button.

FINISH GROUP
✞ This group is used to complete the merge.
✞ Click the **Finish and Merge** button in the **Finish Group**.
✞ Three options will appear as described in the list below.

✶ **Edit Individual Documents** – This option will merge the letters to a new document. The letters can be previewed and then sent to the printer.
✶ **Print Documents** – Use this option to send the results of the merge directly to the printer.
✶ **Send E-mail Messages** – This option will send the merge results to the e-mail recipients specified in the merge document.

✞ Select one of the options to complete the merge.