

MAIL MERGE – GENERAL INFORMATION

- ✓ A Mail Merge produces letters for mailings that are mass-produced, but look individualized.
- ✓ A single letter is written and then merged into several letters.
- ✓ The recipient information appears in another document called a Recipient List or Data Source.
- ✓ The recipient list and the letter are merged to produce the letter as a personalized letter to all or some of the entries in the records from the Recipient List or Data Source.

KEY TERMS

Main Document

- ✓ This document contains information that is the same for each merge document.
- ✓ It contains the field names that represent the variable information to be inserted into the document.

Recipient List/Data Source

- ✓ This list contains the personalized information that varies for each Merged Document such as the name and address of a person, a payment due amount, or an appointment date and time.
- ✓ It contains the field names that represent the variable information that is to be inserted into the letter, envelope, labels, e-mail message, or directory.

Boilerplate Text

- ✓ This is the text in the Main Document that is the same for each version of the document.

Data Form

- ✓ The data form represents one data record.
- ✓ It is used to add, delete, or modify a record in the Recipient List/Data Source.

Field

- ✓ A field is a piece of information specific to an item or individual, such as First Name, Last Name, or Address.
- ✓ It contains the Merge Field's name. This is the name given to the Field in the Recipient List/Data Source.

Record

- ✓ This is the entire collection of fields related to an item or individual contained in the Recipient List/Data Source.

Field Name

- ✓ This is the name of a Data Field, such as Last Name or First Name.
- ✓ It identifies what type of data is to be included in the field.

Merge Field

- ✓ This field identifies which category (field) of the Recipient List/Data Source information will be printed in the Main Document.
- ✓ It appears in the Main Document and the Recipient List/Data Source.

SIX BASIC STEPS TO FOLLOW WHEN SETTING UP A MERGE

- ✓ Select the Type of Document.
- ✓ Select or Create a Main Document.
- ✓ Select or Create a Recipient List/Data Source.
- ✓ Write the Letter.
- ✓ Preview the Letters. Envelopes, Email Messages, or Directory.
- ✓ Complete the Merge.