5

Mail Merge

5.1 INTRODUCTION

A common word processing task is to produce periodic mailings to send to different people or agencies connected to you or your profession or your business. The mailings features in Word can help you to organize your address data, get it into a document, and print it out in the desired format. The main uses of Word's Mail Merge features are:

- You can merge a list of names and addresses to a single letter that can be sent to different people in their names and addresses.

- You can create categories, a single letter with variable information fields in it, or labels.

- You can also produce merged documents such as directory lists, invoices, print address lists, or print addresses on envelopes and mailing labels.

5.2 OBJECTIVES

After going through this lesson you would be able to:

- to create form letters, mailing labels, envelopes

- to organize the address data and merging it into a generic document, and printing the resulting personalized documents

- to customize a mail merge

5.3 TYPES OF DOCUMENTS IN MAIL MERGE

Mail Merge requires three types of documents:

(a) **Main Document**: In a Mail Merge operation, the personalized document (such as, a standard letter, or envelope, or mailing label) is known as the main document. It is the document containing the text and graphics that stay the same for each version of the merged document - for example, the return address and body of a form letter.

(b) **Data Source**: Data source is a file that contains the names and addresses or any other information that vary with each version of a mail-merge document. For example, a list of names and addresses for a form letter you want to send to a list of clients or other people.

(c) **Merge Document**: When you merge the main document with data source, a third document called merge document will be produced. The merge document can be merged to the screen to view letters along with addresses; or directly to the printer to print the letters along with addresses and print addresses on envelopes or labels; or save as some other file that can be used later for printing. Inserting the data or information from the data source in the main document creates the merge document. For example, insert the merge field «City» in a letter document to have Word insert a city name, such as "New Delhi" that is stored in the City data field.

Mail Merge or Mailings feature in Word 2007 is available in Main Tab bar. Click on the '**Mailings**' tab on the main tab bar to activate the mailings features and tools, which comprises subtask such as "**Create**", "**Start Mail Merge**", "**Write & Insert Fields**", "**Preview Results**" and "**Finish & Merge**"
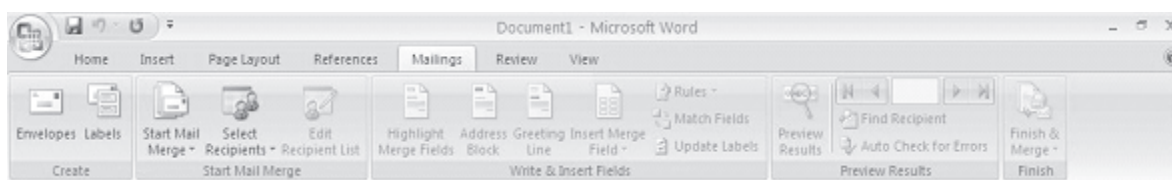
Fig. 5.1

5.4 MAIL MERGE WIZARD

Fig. 5.2

The Mail Merge wizard guides you through the process of doing a mail merge. This involves creating and editing main document; creating a new data file opening an existi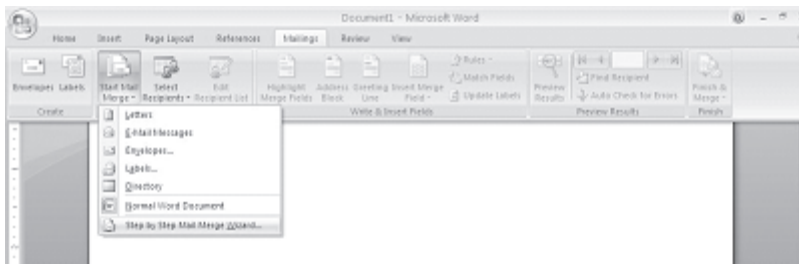ng data file; and me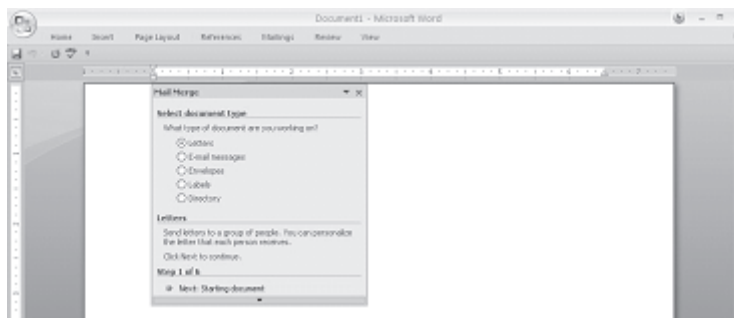rging the data fields with main document. To use Mail Merge Wizard, select **Mailings→Start Mail Merge** subtask from the main tab bar**.** Then select **Step by Step Mail Merge Wizard** option on the subtask bar.

Fig. 5.3

The **Mail Merge Wizard** menu will appear on the screen. This will help you to create mail merge documents in customised step manner. The Wizard has 6 steps to create a mail merge document.

5.4.1 Select Document Type

Fig. 5.4

In this section you will learn how to select a main document using Mail Merge Wizard. Selecting a Document Type is the first step towards creating a mail merger document. Using this option you can choose the type of main document such as Letters, E-Mail Messages, Envelopes, Labels, Directory. Most often the standard document type used is Letter. However, it can also be a mailing label, an envelope etc. To create a simple letter with variable (current) date, follow these steps:

When you select Letters type, you can use this letter to send to a group of people with a

personalised letter that is received by different people in that group with different address.

Select **Letters** from the options given in the Select Document type box and click on the "Next: Starting document" located on the lower end of the Wizard dialog box to move to the next step.

5.4.2 Select Starting Document

1.   The 2nd step in the process is to select starting document under Letters option. There are three options available.

Use the current document: This is to use the current document shown and use the mail merge features to add recipients address or information. This is suitable when you already have letter draft for the purpose and just want to add address of the recipients to the letter.
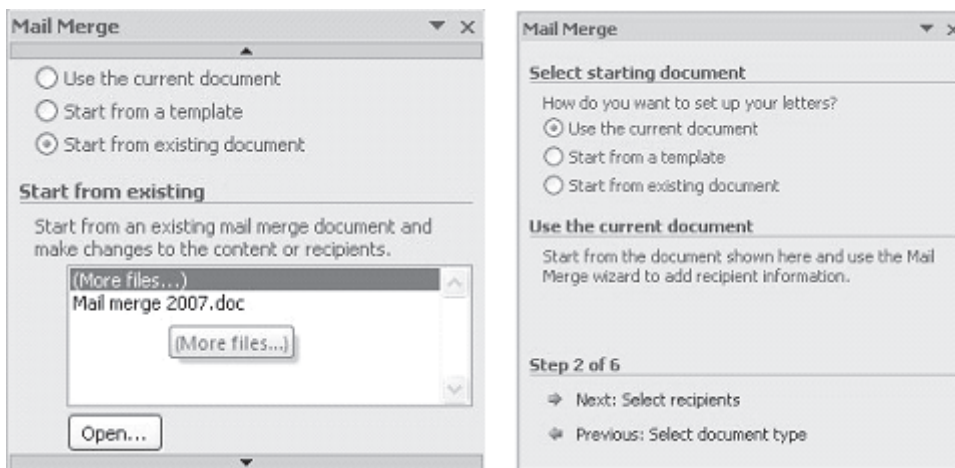

Fig. 5.5

Start from a Template: Similarly if you don't have a drafted letter for use, you can choose for ready to use mail merge template already available with Word 2007. These templates can be customised as per your requirement.

Start from existing document: If you already have a document available with you, you can select the exiting mail merge document and make necessary changes to the content of the letter and/ or recipients.
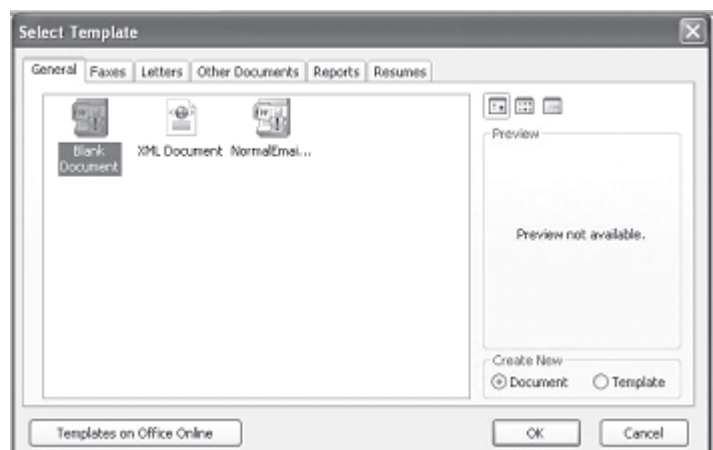

Fig. 5.6

Let us select "Start from a Template" and the select a blank document. When you select this option, Mail Merge Wizard will display the following sub menu option to select a template. Here you can select various templates that suit your requirement or you can select a blank document to create your own customised letter. Let us select "Blank Document" to create our own customised letter.

2. Leave some space (approximately 6 to 7 lines by pressing ENTER key) to insert addresses through merge fields later. Do not type any thing in this space. We will learn how to insert addresses from data source through data fields later in this unit. You can also insert fields anywhere in the body of the letter. The following Figure shows an example of form letter created to send the letters to all the students admitted for DIT programme offered by National Institute of Open School. We have left some space below the date to insert name address fields of students. The enrolment number field also can be inserted at 'Your enrolment number is ' later when data source is ready.

Type the body of the letter.
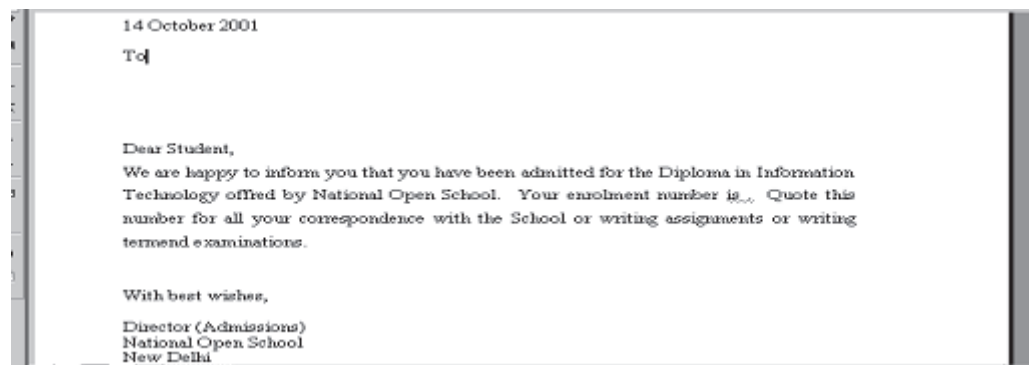
Fig. 5.7

Save your document.

5.4.3 Creating a Data Source

The 3rd step in Mail Merge Wizard is to select a list of recipients or address to whom the drafted letter will be addressed and dispatch.

If you do not have existing database information, you must create your own data source of the fields of information that will be inserted into the letter or any other main document. For example, a Mail Merge letter you have created earlier might require that you have the following fields in address list of students as data source: Name, Address1, Address2, City, State, and PIN Code.
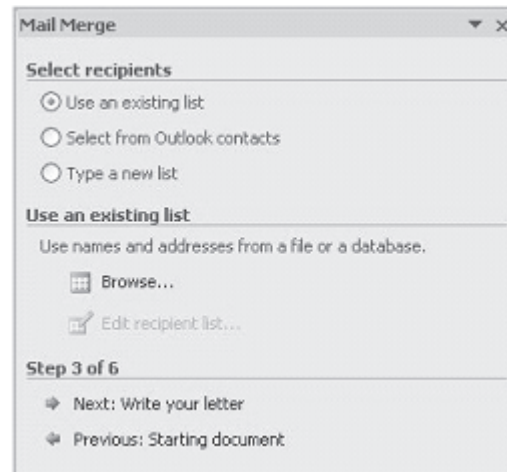
Fig. 5.8

In this lesson, you will learn how to create a data source using Mail Merge Wizard using a Word table or importing your Excel Worksheet.

(a) Creating a Data Source Using Mail Merge Helper

You can use the Mail Merge Wizard to create a Microsoft Word, Excel or Access database data source.

Follow these steps to create a data source using Mail Merge Wizard: Open a new blank document if you have not yet created the main document or open your existing main document.
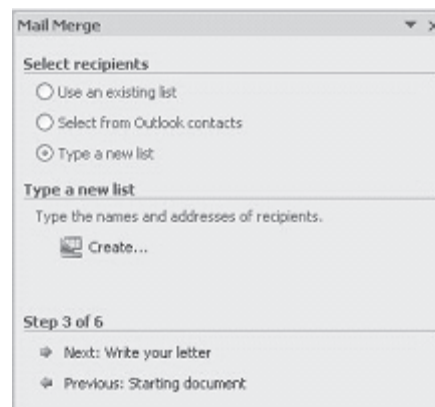
Fig. 5.9

1. Select **"Type a new list"** from the **"Select Recipients"** dialog box in step 3 of the Mail Merge Wizard and then select **"Create"** option.

2. A dialog box appears to create a list with new set of data such as Title, First Name, Last Name, Company Name and Address Line 1 and so on.

3. You can start entering data to the respective field as per your requirement directly into the displayed **New Address List** dialog box.

4. Should you want to **C u s t o m i s e Columns** the filed in the new address list to remove or add any other field as new your requirement, click on the customised button located on the lower right side of the New Address List dialog box.
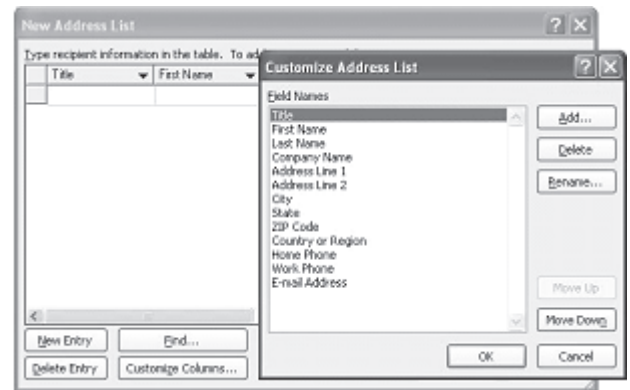

Fig. 5.10

5. This will display a list of available data field to which you can add a customised data filed, delete or rename an exiting data field in the list. Once done click on the "**OK**" button.

6. When you finish specifying the required data fields to the new address list, click **OK**. The **Save As** dialog box appears.

7. Locate the folder that you want to save the data source in, type a file name, and then click **Save As** in the Save As dialog box. The file will be saved with an extension name .mdb (Microsoft Database).

(b) Editing Existing Data Records

To edit the existing data records in the data source file, follow these steps:

1. Open the data source file and then select **Use an exiting list** option from the Select Recipients dialog box displayed in step 3 of the Mail Merger Wizard. The toolbar will appear on the screen.

2. Now click on the **Browse** option to display the **Select Data Source** dialog box. Now search the folder where you have stored the data file which you want to use and the click on **Open** button to access the data file.

3. You can open various data file format such as Access database, Excel files, Word File, Rich Text format etc.
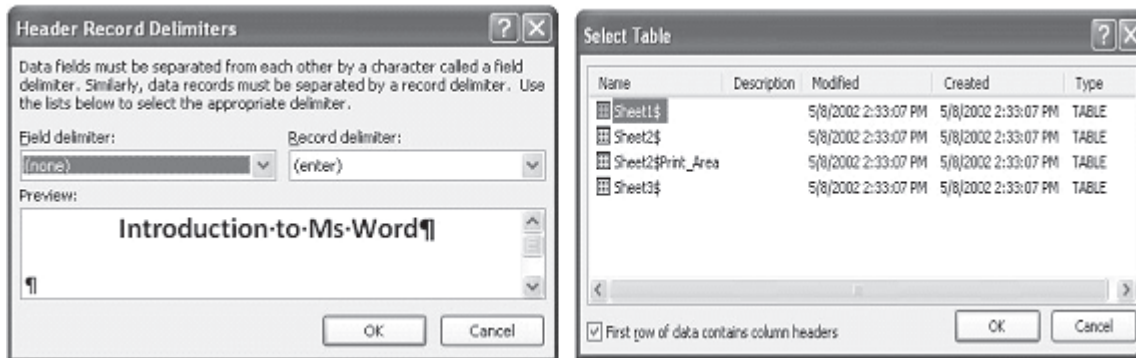
Fig. 5.11

4. Once the data file is selected, based of the type of data file is selected, Mail Merger will ask you to define how to distinguish between data fields and data record.

5. Once it is done, the data file will be loaded in to Mail Merger and you can now click on **Edit Recipient List** button to be able to edit the list as per your requirement.

6. To locate a data record that you want to change, move to the record number you want change its contents by clicking the arrow keys or typing the record number; or click **Find**, and then search for information that you know the record contains.

7. Edit the records that you want to change and save the changes.

(c) Creating a Data Source Using Word Table

In fact, the Mail Merge Wizard guides you step by step through setting up a Word table that contains your names, addresses, and other data. Instead of taking advantage of Mail Merge Wizard, you can also create a data source by entering field names and data directly in a Word table. Follow these steps to do this:

1. Insert a table by selecting tab **Insert→Table** command on the main tab bar and create a table as given below.

2. Type the data field names on the top row of the table. Start typing the data records from the second row.

3. When you finish entering all the data records, save the table as a Word document. Your data source document is ready.

Enrol No	Name	Add 1	Add 2	City	State	PIN
01785679	Ram	13, 7th Main Road	Vijaya Nagar	Bangalore	Karnataka	560040
01785680	Lakshmi	Rampur (Vill),	Shadipur (Post)	Chittoor (Dist)	Andhra Pradesh	571131
01785681	Renu	85A	Pocket-K	Sheikh Sarai-II	New Delhi	110030
01785682	Khan	76 Main Road	Vidya Nagar	Lucknow	Uttar Pradesh	

(d) Using Excel Worksheet to Create a Data Source

You can also use Excel program to create a data source. Follow these steps do this.

1. Start Excel program. Open Worksheet.

2. Type the data field names on the top row of the worksheet. Start typing the data records from the second row.

3. When you finish entering all the data records, save the worksheet.

4. Select the data field names and data records you typed in the worksheet, and then click on **Copy** button in the standard toolbar. Close the file and then exit Excel program.

5. Open Word program. Open a new document and then click on Paste button. The data will be copied to word document in a table form. Save the document. Your data source document is ready.

5.4.4 Merging Documents

Once if you have created your main document and data source document, the next two steps in mail merge are to insert merge fields in the main document and then merge data in the main document.

To merge the fields in the main document you may have to do some editing in the main document. Follow these steps as defined in the step 4 of the Mail Merge Wizard to do this:

1. Click on the location of your letter where you want the addresses to be displayed and then

2. Select **Address Book** option on the dialog box displayed in step 4 of the Mail Merge Wizard. The **Mail Merge Wizard** displays the **Insert Address Blok** dialog box.
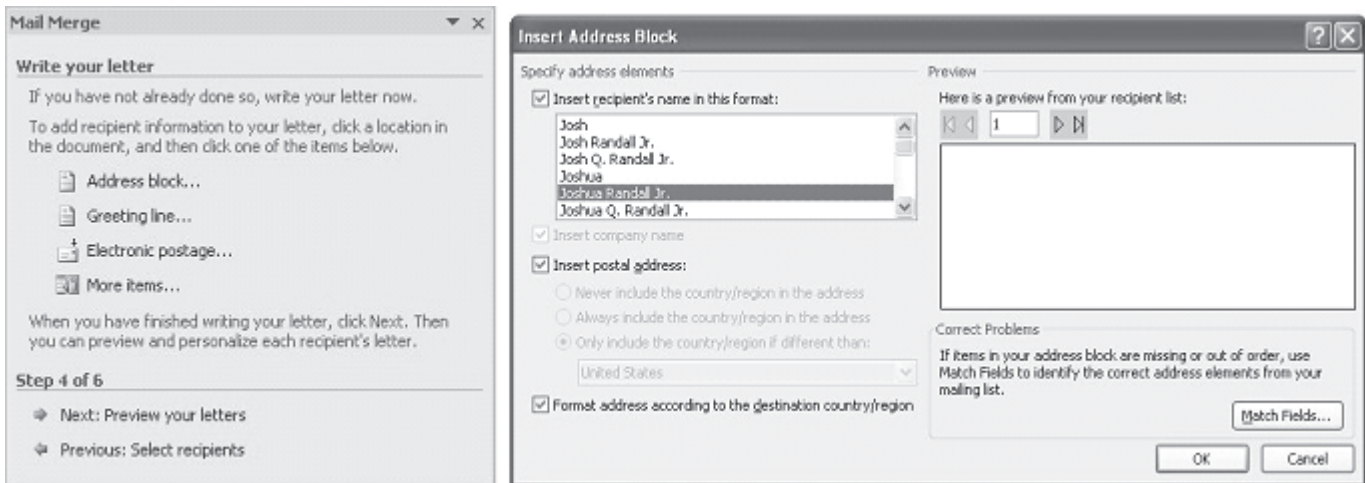
Fig. 5.12

3.   Using **Insert Address Block** you can select the individual address field to be inserted into the main letter.
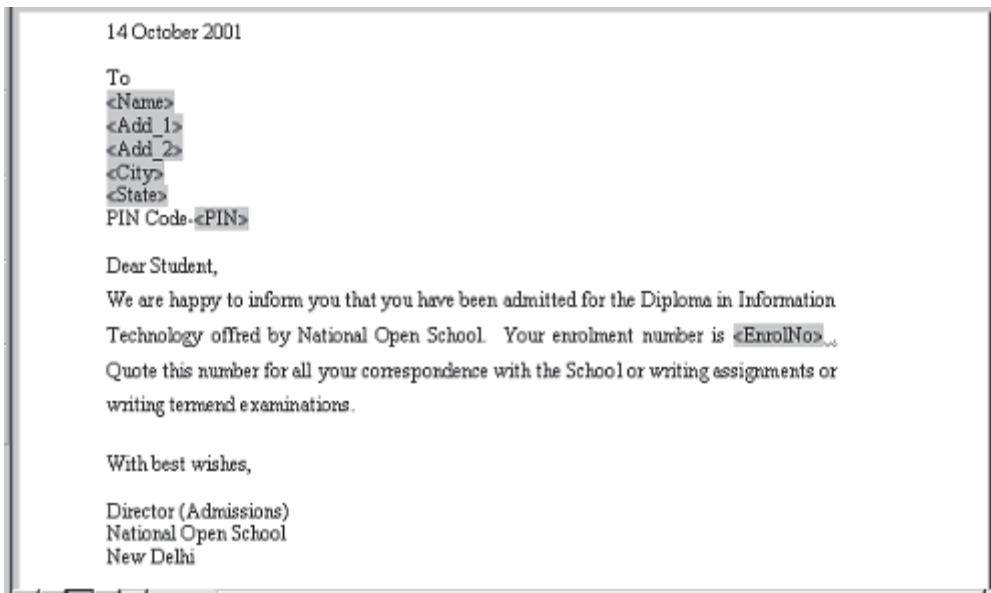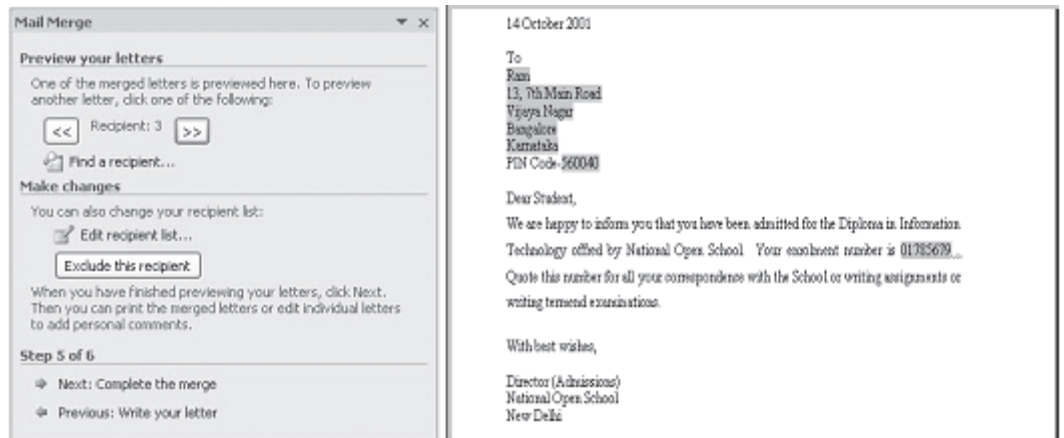

Fig. 5.13

4.   After you complete the main document and insert all of the merge fields, click on the **Office Button** to save **Save As** option. Now select "Word Document" to save the file as a Word 2007 document or Select "Word 97-2003 Document" to save it as Word 97 or 2003 compatible ducument. Name the document, and then click **Save**. Now your main document will work as merge document.

5.4.5 Merging the Data into the Main Document

Merging the data into the main document is the last step of the Mail **Merge Wizard**. Click on the << or >> button to display the preview of the main letter with address data before you close the merge document and take the printout of the letter.

Fig. 5.14

Once finished click on the "Next: Complete the Merge" option on the dialog box to complete the merging process.
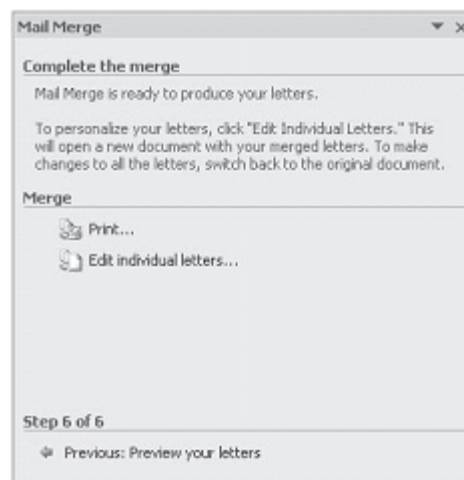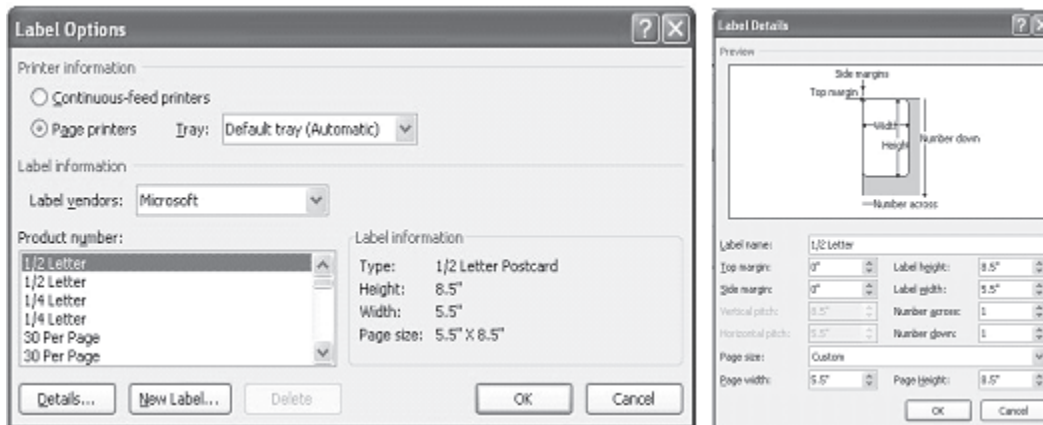

Fig. 5.15

5.5 CREATING MAILING LABELS BY MERGING AN ADDRESS LIST

If you have already created a data source (say address list) as explained earlier, it is easier to merge this address list with your

main document that can be used as mailing labels.

1. **Create the Main Document:** Click on **New** on the Standard toolbar. Then select **Mailings→Start Mail Merge** subtask on the main tab bar. Under sub task **Start Mail Merge,** select **Labels**. The **Microsoft Word** will display the **Label Options** dialog box.

Fig. 5.16

2. In the **Label Options** dialog box, select the type of printer and labels you want to use, and then click **OK.** (If the type of labels that you want to use is not listed in the **Product number** box, you can create your own custom labels.). Click on the **New Label** button to create a customized label as per the requirement.

3. **Open the Data Source:** Once you finished selecting the label type and format for use, it is now time to select the data source from where the data will get added to the labels. In the main tab bar, under **Mailings** tab, click **Select Recipients**, and then click on **Type New List** or **Use Existing List** or **Select from Outlook Contacts** depending on whether you want to create new address list or use and exiting one.

4. Select **Use Existing List** to display the **Select Data Source** dialog box. Browse to the location where you have created your data source (address list), and then click **Open** button.

5. You can open various data file format such as Access database, Excel files, Word File, Rich Text format etc.
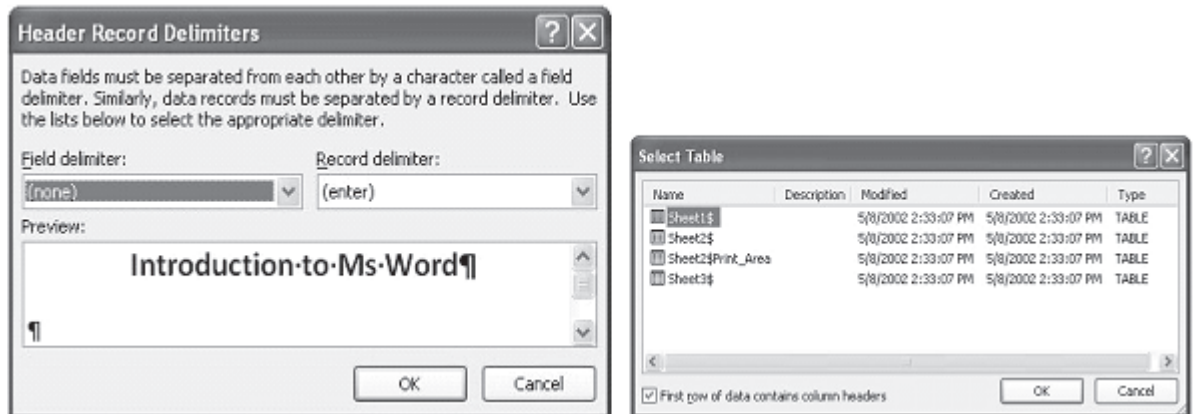
Fig. 5.17

6.   Once the data file is selected, based of the type of data file is selected, Mail Merger will ask you to define how to distinguish between data fields and data record.

7.   Once it is done, the data file will be loaded in to Mail Merger and you can now click on **Edit Recipient List** button under the sub task **Start Mail Merge** to be able to edit the list as per your requirement.

8.   To locate a data record that you want to change, move to the record number you want change its contents by clicking the arrow keys or typing the record number; or click **Find**, and then search for information that you know the record contains.

9.   Edit the records that you want to change and save the changes.

10.   Select **Mailings→Write & Insert Fields** sub-task and click on the **Insert Merge Field** to insert merge fields where you want to merge addresses from the data source to be inserted on the labels document. Click **Insert Merge Field** and then click the field name you want to be inserted and click **OK**. The selected data field or filename will get inserted on to the labels document and you can continue selecting the entire set of data field name you want to appear on the label document.
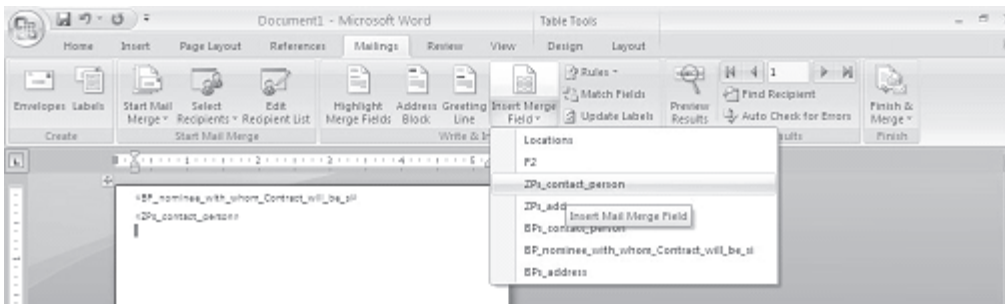
Fig. 5.18

11. **Merge the Data into the Main Document:** In the **Mailings** tab bar, click on the **Preview Results** to display the merged labels with actual data from the selected data source before the labels are printed. This will help you to view the label as they will get printed and take any corrective measures if required before the labels are finally printed. You can also move around the set if data fields to preview all the labels using < and > button available under **Preview Results** sub-task.
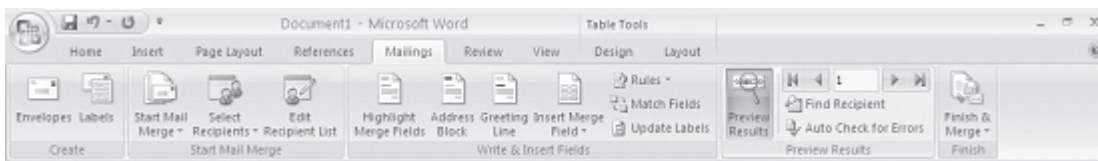

Fig. 5.19

12. **Merge the data with the document. If** you want to send the merged labels directly to a printer, click **Finish & Merge** sub-task under **Mailings** tab, and then click Print Documents.

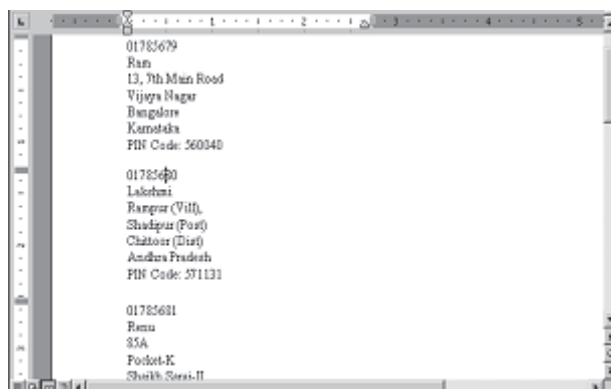13. The merged labels will be printed and will look like

Fig. 5.20

5.6 CREATING ENVELOPES BY MERGING AN ADDRESS LIST

If you have already created a data source (say address list) as explained earlier, it is easier to merge this address list with your envelopes so that you can directly print the addresses in the envelopes (instead of printing the address labels on stickers and then sticking them on the envelopes) for mailing purpose. You can do this in 4 steps:

1. **Create the Main Document:** Click **New Blank Document** on the Standard toolbar. Select **Mailings→Start Mail Merge** subtask on the main tab bar. Under sub task **Start Mail Merge**, select **Envelopes.** The **Microsoft Word** will display the **Envelop Options** dialog box.

Fig. 5.21

2. On the **Envelope Options** tab, select the **envelope size** you want from a variety of predefined sizes given under Envelope size: drop down box, and adjust the address format and position on the envelope. (If the envelope size that you want to use is not listed in the Envelope size: box, you can create your own custom envelope by selecting Custom size under Envelope size: drop down box in the Envelope Options dialog box.) Click on the **Printing Options** tab, and make sure that the selected envelope feed options are correct for your printer, and then click OK.

3. **Open the Data Source:** Once you finished selecting the label type and format for use, it is now time to select the data source from where the data will get added to the labels. In the main tab bar, under **Mailings** tab, click **Select Recipients**, and then click on **Type New List** or **Use Existing List** or **Select from Outlook Contacts** depending on whether
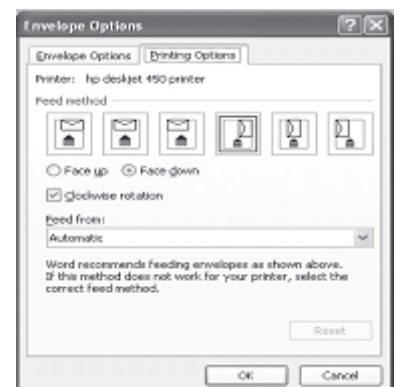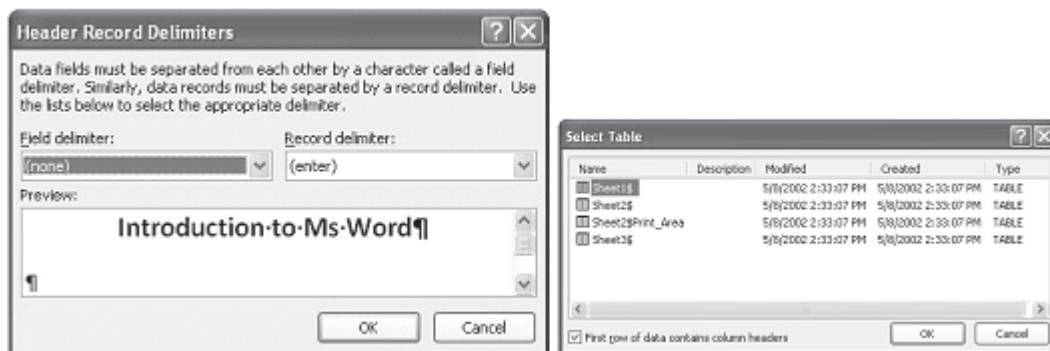

Fig. 5.22

you want to create new address list or use and exiting one.

4.   Select **Use Existing List** to display the **Select Data Source** dialog box. Browse to the location where you have created your data source (address list), and then click **Open** button.

5.   You can open various data file format such as Access database, Excel files, Word File, Rich Text format etc.

Fig. 5.23

6.   Once the data file is selected, based of the type of data file is selected, Mail Merger will ask you to define how to distinguish between data fields and data record.

7.   Once it is done, the data file will be loaded in to Mail Merger and you can now click on **Edit Recipient List** button to be able to edit the list as per your requirement.

8.   To locate a data record that you want to change, move to the record number you want change its contents by clicking the arrow keys or typing the record number; or click **Find**, and then search for information that you know the record contains.

9.   Edit the records that you want to change and save the changes.

10. In **Mailings** Tab under **Write & Insert Fields** sub-task, click on the **Insert Merge Field** to insert merge fields where you want to merge addresses from the data source to be inserted on the labels document. Click **Insert Merge Field** and then click the field name you want to be inserted and click OK. The selected data field or filename will get inserted on to the envelope and you can continue selecting the entire set of data field name you want to appear on the envelope document.
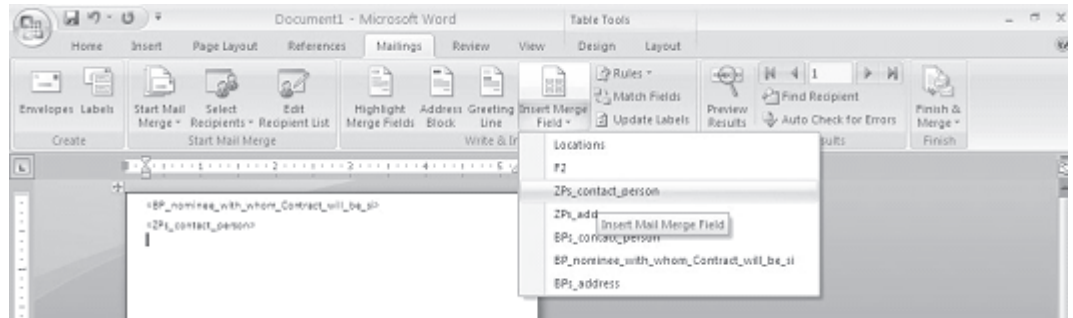
Fig. 5.24

11. **Merge the Data into the Main Document:** In the **Mailings** tab bar, click on the **Preview Results** to display the merged labels with actual data from the selected data source before the labels are printed. This will help you to view the label as they will get printed and take any corrective measures if required before the labels are finally printed. You can also move around the set if data fields to preview all the labels using < and > button available under **Preview Results** sub-task.
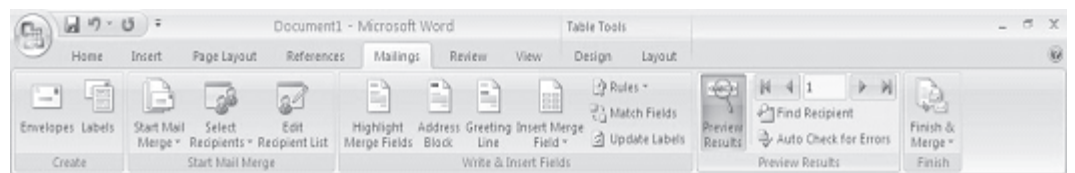

Fig. 5.25

12. **Merge the data with the document.** If you want to send the merged labels directly to a printer, click **Finish & Merge** sub-task under **Mailings** tab, and then click **Print Documents.**

Fig. 5.26

INTEXT QUESTIONS

1. What is the difference between main document and merge document in Main Merge?
2. In Mail Merge, a data source can be created using ———— or————.
3. You can merge the data records to———————— or ————.
4. To send the merged documents for electronic mailing, it is necessary that your computer has the ————— connection.

5. State True or False
   a. Using Word's Mail Merge features you can merge address list in a single letter that can be sent to different people but you cannot insert variable fields in the body text of the letter.
   b. It is not possible to send the merged documents for fax without Fax machine connected to your computer.
   c. The data records created in a worksheet using Excel cannot be used as a data source for Mail Merge.

5.7 WHAT YOU HAVE LEARNT

In this lesson you learnt about the use of mail-merge in MS-Word environment. Now you can merge a list of names and addresses to a single letter that can be sent to different people in their names and address. Secondly, you can create categories, a single letter with variable information fields in it, or labels. Finally, you can produce merged documents such as directory lists, invoices and address lists, Print addresses print on envelopes or mailinbg labels.

5.8 TERMINAL QUESTIONS

1. Briefly explain the following: (a) Main document, (b) Data source, and (c) Merge document.
2. Write any two features of Mail Merge.
3. Explain steps in creating a main document for form letter.
4. Write steps in editing existing data records in Main Merge.
5. How do you create a data source using Word table?
6. Write steps in using Excel worksheet as a data source for your Mail Merge.

5.9 FEEDBACK TO INTEXT QUESTIONS

1. In a Mail Merge operation, the personalized document (such as a letter) is called as the main document. When you merge the main document with data source, a third document called merge document will be produced.

2. Mail Merge Helper or Word Table.

3. A new document or printer.

4. Internet

5. (a) False (b) True (c) False