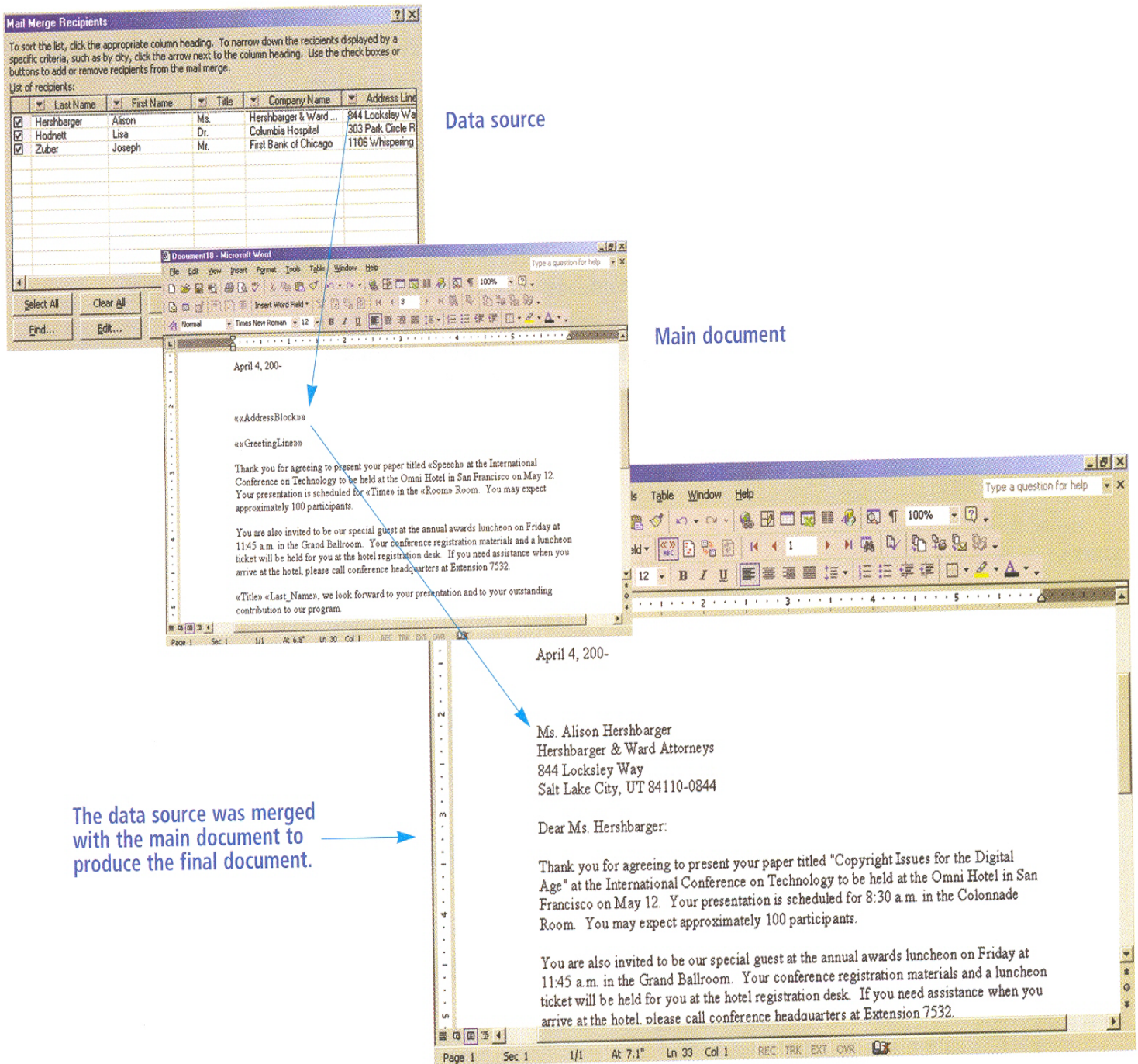# Mail Merge

Creating personal form letters, printing labels, and addressing envelopes to a large number of individuals are tasks done easily using the mail merge feature. **Mail merge** is creating a new (merged) document by combining information from two other documents—the main document and the data source.

The **main document** contains the text and graphics that remain the same for each version of the merged document. Within the main document, **merge fields** are inserted as placeholders in locations where you want to merge names, addresses, and other variable information that comes from the data source file.

The **data source** is a file that contains the names, addresses, and other variables to be merged with the main document. All the variables for one individual person are called a **record**. The separate variables for each record are called **fields**.

Data source

Main document

The data source was merged
with the main document to
produce the final document.

The Mail Merge Wizard is a straightforward way to produce a merged document such as the form letter you will create.

To start the Mail Merge Wizard:

1. Open a new document and save it with a meaningful name.
2. Select **Tools**, then **Letters and Mailings**, and then **Mail Merge Wizard**. The Mail Merge pane displays at the right of the screen.

D r i l l   1 | **MAIL MERGE WIZARD**

1. Follow steps 1 and 2 above to start the Mail Merge Wizard. In step 1, save the blank document as **learn-merge**.

2. Follow the six steps of the Mail Merge Wizard explained below and on the next few pages. To move from one step to the next, click **Next** located at the bottom of the pane. This drill will lead you through the steps for using the Mail Merge Wizard.
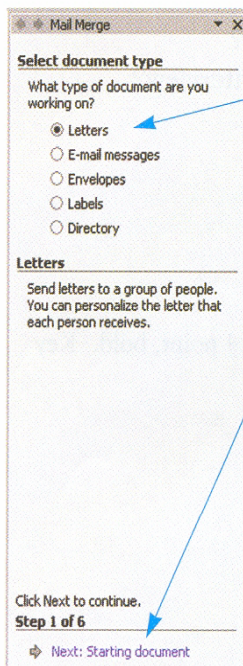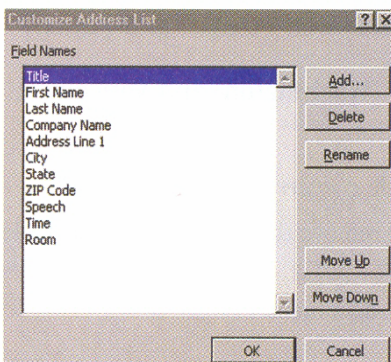

Step 1: Select document type

1. Choose **Letters** (or the type of document you will use for the main document).
2. Click **Next: Starting document** to go to Step 2 of the Wizard. (*Note:* You may click **Previous: Select document type** to return to the previous step.)

Step 2: Select starting document

1. Click **Use the current document** to create a new form letter in the active window (or choose **Start from a template** to use a *Word* template, or choose **Start from existing document** to use a form letter you have already created).
2. Click **Next: Select recipients**.

Step 3: Select recipients

1. Click **Type a new list** because the data source does not yet exist. (Choose **Select from Outlook contacts** to use the Outlook address book, or choose **Use an existing list** to use a file that you created previously).
2. Under *Type a new list*, click **Create**. The New Address List dialog box displays.
3. Click **Customize** to edit the default field names provided in the Wizard. The Customize Address List dialog box displays.
   a. To delete a field name, select the field and click **Delete**. Click **Yes** to confirm the deletion of each field. For this drill, delete **Address Line 2**, **Country, Home Phone**, **Work Phone**, and **E-mail address**.
   b. To add a field name, click **Add**. The Add Field dialog box displays. Add three fields: **Time**, **Room**, and **Speech**.
   c. To position the new fields correctly, select the field to be moved. Click **Move Up** or **Move Down** as appropriate. Move the field names so they are positioned

4. Key the variables for Record 1. Click **New Entry** to begin a new record; key variables for Record 2. Repeat for Record 3.

Field names	Record 1	Record 2	Record 3
Title	Ms.	Dr.	Mr.
First Name	Alison	Lisa	Joseph
Last Name	Hershbarger	Hodnett	Zuber
Company Name	Hershbarger & Ward Attorneys	Columbia Hospital	First Bank of Chicago
Address Line 1	844 Locksley Way	303 Park Circle Road	1106 Whispering Pines Road
City	Salt Lake City	Milwaukee	Chicago
State	UT	WI	IL
ZIP Code	84110-0844	53221-0303	60650-1106
Speech	"Copyright Issues in the Digital Age"	"Creating Interactive Presentations"	"Creating a Web Presence for Your Organization"
Time	8:30 a.m.	9:30 a.m.	10:30 a.m.
Room	Colonnade Room	Diplomat Room	Laurel Suite

5. Click **Close** after keying all of the records. The Save Address List dialog box displays. Enter a filename (**learn-data**) in the File name box and click **Save**. (*Note*: By default, data files are saved to the folder My Data Sources under the My Documents folder.) In the Save in box, choose the appropriate folder for saving this file.

6. The Mail Merge Recipients dialog box shows the variables in table format. Click **OK** (or click **Edit** to view the data in the New Address List dialog box).

7. Click **Next: Write your letter** from the Mail Merge Task Pane.

Step 4: Write your letter

1. Begin keying the main document on approximately Ln 2.1". Insert the date as a field (**Insert menu, Date and Time**; click the **Update automatically box**). Press ENTER four times.

2. Click **Address block** from the right pane (or click the **Insert Address Block** button on the Mail Merge toolbar). The Insert Address Block dialog box displays. Click **OK** to accept the default settings for recipient's name, company name, and postal address.

3. Press ENTER two times.

4. Click **Greeting line** in the far right pane of the Mail Merge box (or click the **Insert Greeting Line** button on the Mail Merge toolbar). The Greeting Line dialog box displays. Business letters may use open or mixed punctuation (mixed punctuation includes a colon after the salutation and comma after the complimentary closing). This letter applies mixed punctuation; therefore, click the down arrow to the right of the comma. Select the colon and click **OK**. Press ENTER two times and continue keying the letter until you reach the merge field code for Speech.
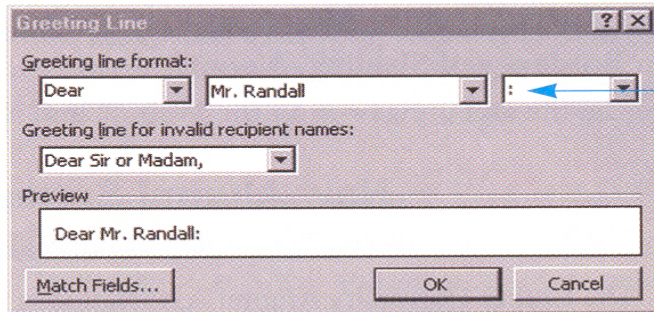
Choose colon for mixed punctuation.

5. Insert the merge field for Speech:

   a. Click **More Items** from the right pane (or click the **Insert Merge Fields** button on the Mail Merge toolbar).

   b. Select **Speech**; click **Insert**, and then **Close**. (*Tip:* When necessary, strike the Space Bar to insert a blank space between fields. Insert punctuation as necessary between fields or at the end of a field.)

   c. Continue keying the letter. Insert the merge fields for Time and Room at the appropriate places.

(Date Code) (Enter 4 times)

«AddressBlock» (Enter 2 times)

«GreetingLine» (Enter 2 times)

Thank you for agreeing to present your paper titled «Speech» at the International Conference on Technology to be held at the Omni Hotel in San Francisco on May 12. Your presentation is scheduled for «Time» in the «Room». You may expect approximately 100 participants.

You are also invited to be our special guest at the annual awards luncheon on Friday at 11:45 a.m. in the Grand Ballroom. Your conference registration materials and a luncheon ticket will be held for you at the hotel registration desk. If you need assistance when you arrive at the hotel, please call conference headquarters at Extension 7532.

«Title» «Last_Name», we look forward to your presentation and to your outstanding contribution to our program.

Sincerely yours, (Enter 4 times) | Ms. Jacqueline VonKohn

Program Coordinator | xx

6. Click **Save** on the Standard toolbar to update the changes you have made to the file **learn-merge**.

7. Click **Next: Preview your letters**.

Step 5: Preview your letters

1. Click on the navigation buttons to preview each of your letters. (*Tip:* Should you need to edit one of the letters, click **Edit recipient list** and make the necessary changes to the data source file.)

2. Click **Next: Complete the merge**.

Step 6: Complete the merge

1. Click **Edit individual letters**. Click **All**; then **OK**. The merge letters will appear on the screen as a new document with a page break between each.

2. Save the merged file as **67c-drill** and print.
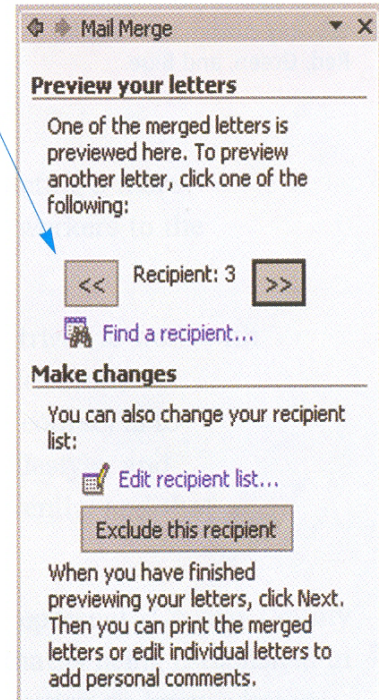
Applications

67d-d1
Mail merge

1. Save a new document as **67d-d1merge**.

2. Create the data source. Save as **67d-d1data**.

Field names	Record 1	Record 2	Record 3
Title	Mrs.	Mr.	Ms.
First Name	Jessica	Allen	Paje
Last Name	Quarrels	Bouchillon	Vang
Company Name	Hendrix Plastics	Magnolia Chemicals	Faulkner Florists
Address Line 1	5689 Old Vinton Road	538 Hill Street	885 N. Third Street
City	Starkville	Columbus	West Point
State	MS	MS	MS
ZIP Code	39759-5689	39701-0538	39773-0885
County	Oktibbeha	Lowndes	Clay

✳ **3.** Key the main document and insert the merge fields in the main document. Use open punctuation. Save the changes. (*Reminder:* The date should update automatically.)

Date

«AddressBlock»

«GreetingLine»

Thank you for submitting your proposal for enacting a more culturally diverse employment program for city workers to the American Studies Association.

The American Studies Association continually strives to work with city governments in three area counties to provide work environments that value diversity. The goal, of course, is to employ persons who reflect differences in age, lifestyle, and interests. Different people solve problems differently, and that leads to better decisions.

You may be contacted, «Title» «Last_Name», to represent «County» County on the special Council for Managing Diversity that is being established in our three-county region. Again, thank you for letting us know what you are doing to ensure diversity at «Company_Name».

Sincerely | Hunter Nyiri, Director | xx

4. Merge the data source and the main document and print. Save as **67d-d1**.