Performing Mail Merges

Lesson Skill Matrix

Skill	Exam Objective	Objective
Setting Up a Mail Merge	Perform mail merges.	3.3.3
	Manage recipient lists.	3.3.4
	Insert merged fields.	3.3.5
	Preview merge results.	3.3.6

Software Orientation

Mailings Tab

You use commands on the Mailings tab to perform mail merges, as well as to create envelopes and labels for a group mailing (see Figure 7-1).

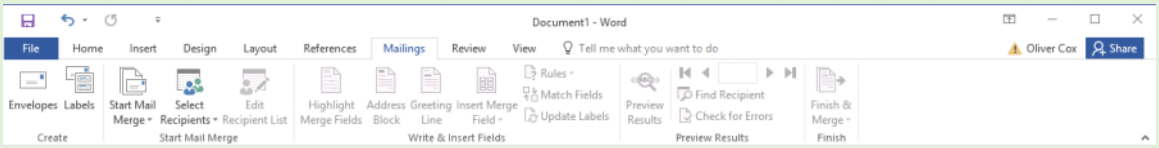


Figure 7-1
Mailings tab

Setting Up a Mail Merge

Mail merges are useful for creating multiple documents that have the same basic content and personalizing them with unique information from a data source—for example, a form letter sent to multiple customers using different recipient names and addresses. You can use mail merges for internal and external correspondence such as memoranda, labels, invitations, and more. The mail merge document contains the same information that everyone will receive. The individuals receiving the document are located in a data source, which is the list of recipients, and contains information for each individual with variable data, such as the person's first and last name, address, city, state, zip code, phone number, and so on. You can create the data source as a Word table, in which Word provides the fields and you type the data in them. You can also customize the fields to fit your document. Word also supports the use of other programs for the data source, such as Excel workbooks, Access tables or queries, or Outlook contacts lists.

Setting Up a Main Document Manually

You can begin working with Mail Merge by typing your letter and then selecting a data source. You can use an existing data source, create your own data source list by typing your recipients' information, or use an Outlook address book for your contact information. You don't need to have a database program installed on your computer because Word makes it easy to create your list of recipients. You can create a table in Word in which the fields are already identified for you and easy to customize. After setting up your document, you can preview your results and check for errors using the tools available in the Preview Results group and then perform the merge. In this exercise, you create a document, type information, insert an existing data source, insert the address block and greeting line, check for errors in the document, preview the letters, and perform the merge.

Step by step **Set Up a Main Document Manually**

GET READY. Before you begin these steps, **LAUNCH** Microsoft Word and **CREATE** a new blank document.

1. On the Mailings tab, in the Start Mail Merge group, click the Start Mail Merge drop-down arrow to display the Start Mail Merge menu (see Figure 7-2).

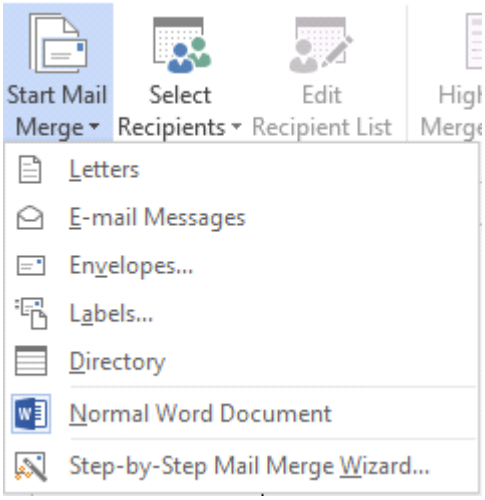


Figure 7-2
Start Mail Merge menu

2. Choose Letters.

PAUSE. LEAVE Word open to use in the next exercise.

Step by step Select Recipients

GET READY. USE the document that is open from the previous exercise.

1. In the Start Mail Merge group, click the Select Recipients button to display the menu as shown in Figure 7-3.

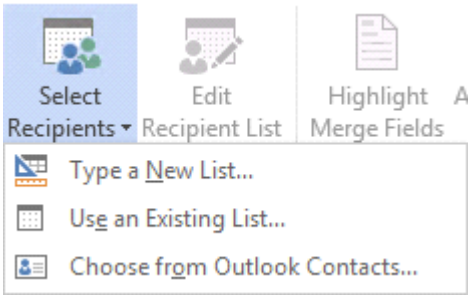


Figure 7-3
Select Recipients menu

Take Note
Notice that some of the commands on the Ribbon are grayed out, and are therefore not available until you open a data source file.

2. Select Use an Existing List. The *Select Data Source* combo box appears. Browse to your flash drive and navigate to your data files for the lesson folder.
3. OPEN the Student List (Access) database from the lesson folder. After opening the data source file, most of the commands on the Mailings tab on the Ribbon become active (see Figure 7-4). When selecting a data source file, the file can be a database, an Excel spreadsheet, a table in Word, or an Outlook contacts list.

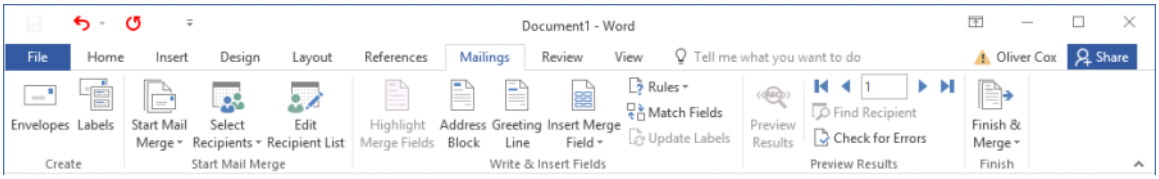


Figure 7-4
Fully activated Mailings tab on the Ribbon

4. At the insertion point, type March 19, 20XX and then press the Enter key twice. By default, the Spacing After is set to 8 pt. Later, you will format the document to an appropriate business format.

PAUSE. LEAVE the document open to use in the next exercise.

Step by step Prepare Merge Fields

GET READY. USE the document that is open from the previous exercise.

1. On the Mailings tab, in the Write & Insert Fields group, click the Address Block button. The *Insert Address Block* dialog box appears (see Figure 7-5).

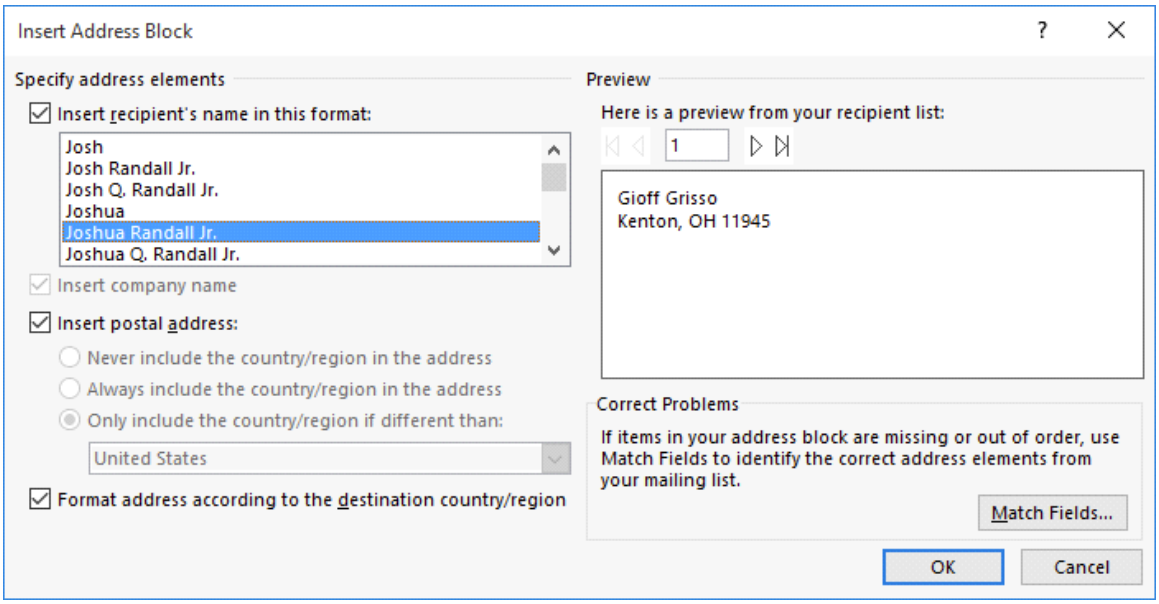


Figure 7-5
Insert Address Block dialog box

2. Notice that the street address is missing in the Preview area. Click the Match Fields button. The *Match Fields* dialog box appears (see Figure 7-6).

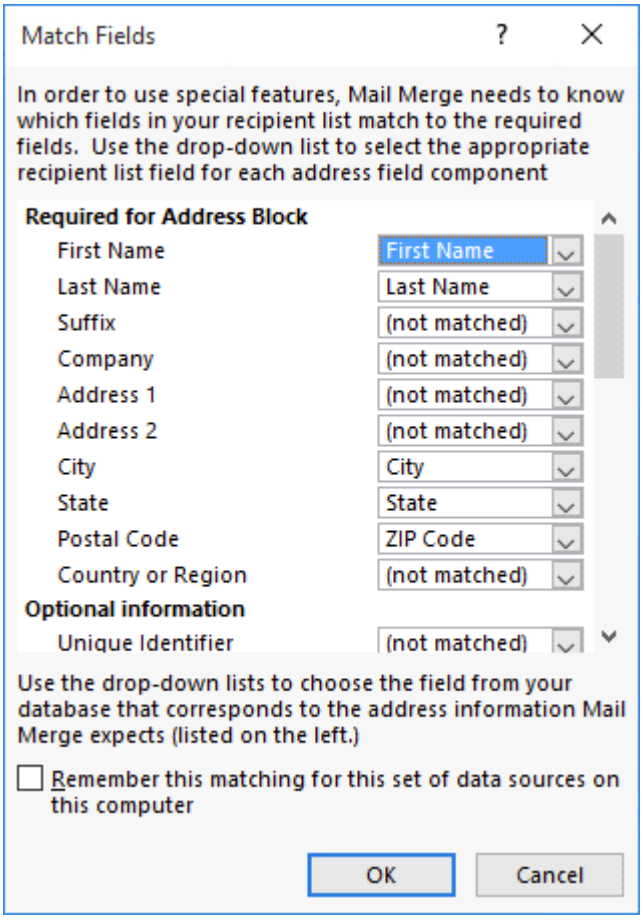


Figure 7-6
Match Fields dialog box

3. To correct the error, select the drop-down arrow for the Address 1 field and then select Address Line. Click OK to close the *Match Fields* dialog box. The address block shown in the Preview area now includes the address line.
4. Click OK to accept the address settings with the correction and close the *Insert Address Block* dialog box.
5. Press Enter once.
6. On the Mailings tab, in the Write & Insert Fields group, click the Greeting Line button. The *Insert Greeting Line* dialog box appears (see Figure 7-7).

Figure 7-7
Insert Greeting Line dialog box

7. For the Greeting Line format, use the salutation *Dear* and then add the default name where *Joshua Randall Jr.* is shown. Change the comma to a colon.
8. Click OK. Press Enter once.

PAUSE. LEAVE the document open to use in the next exercise.

Step by step Write the Letter

GET READY. USE the document open from the previous exercise.

1. Type the following letter (see Figure 7-8):
   The president of the college, Dr. Jose A. Torres, is extending an invitation to all students who received scholarships for the next academic semester. The Graphic Design Institute recognizes all students for their academic excellence. A reception is being held in your honor on March 29 at 12 noon in the President's Conference Room 19. [Press Enter once.]
   Please confirm your attendance by calling 915-999-9999. [Press Enter once.]
   Regards, [Press Enter twice.]
   Jerry Wright [Press Shift+Enter to insert a line break.]
   Scholarship Committee Chair

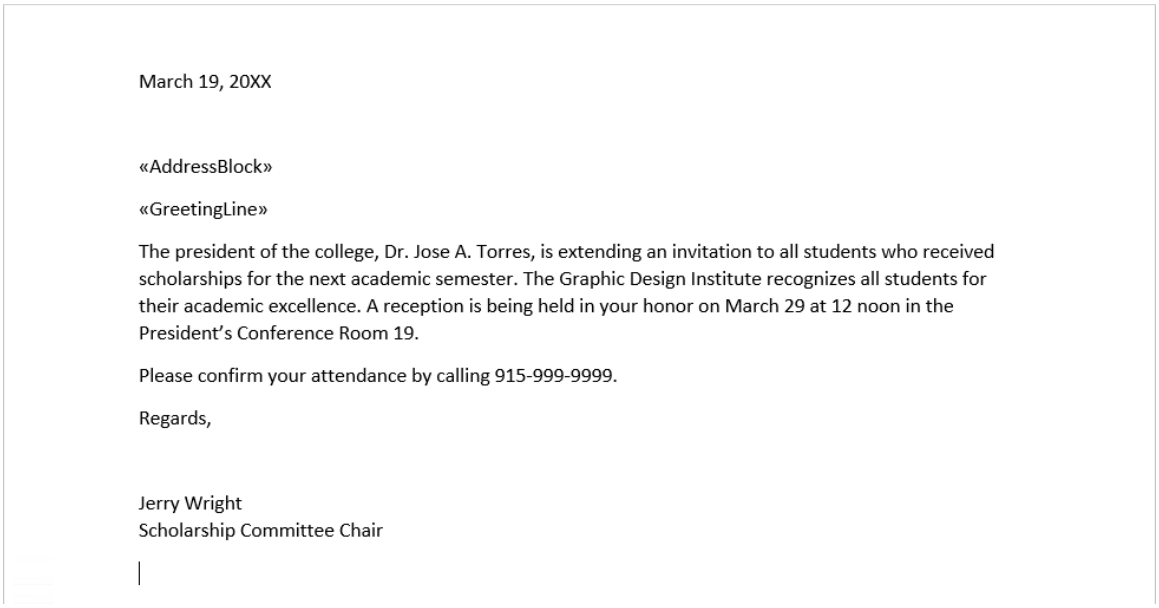


Figure 7-8
Mail Merge letter

PAUSE. LEAVE the document open to use in the next exercise.

Step by step Preview the Document

GET READY. USE the document open from the previous exercise.

1. In the Preview Results group, click the Preview Results button. The first recipient appears, as shown in Figure 7-9.

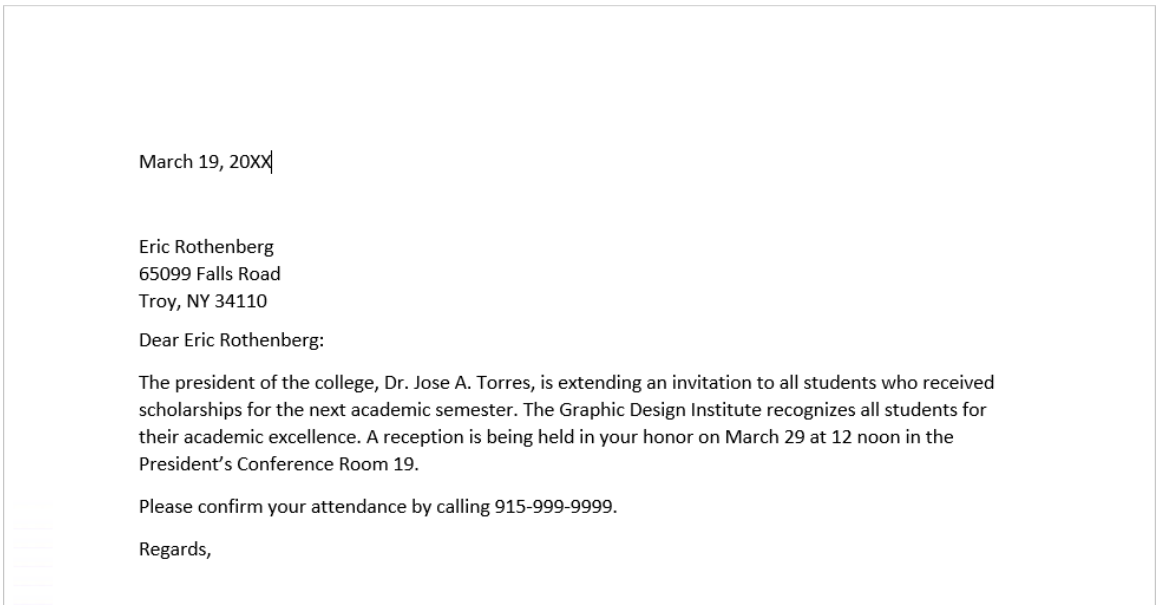


Figure 7-9
Preview letter

2. Click the Next Record arrow button to preview the letters for the other recipients.
3. Disable Preview Results by clicking the Preview Results button again.
4. Place the insertion point in the «Address Block» field. On the Home tab, in the

Paragraph group, click the Line and Paragraph Spacing button and then click Remove Space After Paragraph.

5. Place the insertion point in the «Greeting Line» field. On the Layout tab, in the Paragraph group, change the Spacing Before value to 6 pt. The Spacing Before is increased by 6 pts, separating the address block and greeting fields.
6. On the Layout tab, in the Page Setup group, click the Margins button and then click Custom Margins. The *Page Setup* dialog box appears, with the Margins tab selected. Type 2 in the Top box to change the top margin. Click OK.
7. On the Mailings tab, in the Preview Results group, click the Preview Results button to view the formatting changes you made to the document (see Figure 7-10). After you finish your review, disable Preview Results.

Take Note

Organizations use customized letterheads to print their letters. The top margin must be adjusted to avoid text printing over the organization's logo.

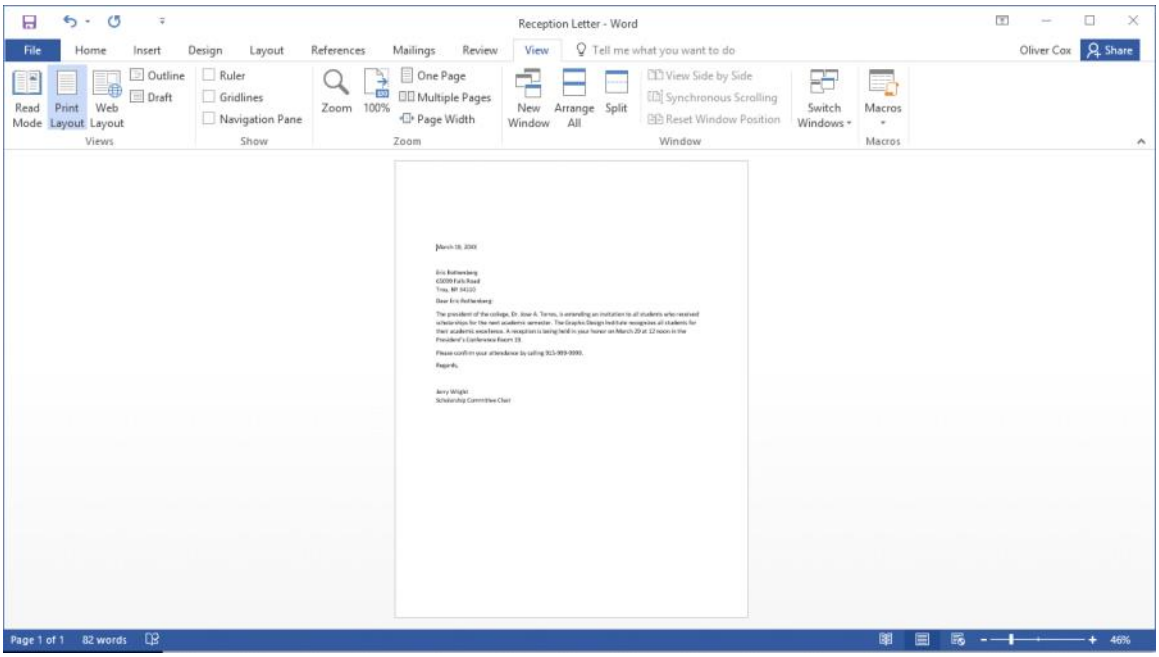


Figure 7-10
Preview results

8. SAVE the main document as Reception Letter in the lesson folder on your flash drive. Saving the main document as a separate document enables you to merge with a new data source file, such as when you need to use the same letter again, but with a different recipient list. When you open a main document that contain field codes, Word asks you for the data source file.

Take Note

The main document is the document that contains the body of the letter as well as the Address Block and Greeting Line merge codes.

PAUSE. LEAVE the document open to use in the next exercise.

Take Note

Once the main document has been set up, you can format at the beginning of the mail merge process.

Executing A Mail Merge

The final steps in a mail merge are to check for errors, preview the merge, and finalize the merge. The Check for Errors feature mimics the merge before you complete the final merge and print process. If there is an error, you can correct it in the main document. For example, if you used the Insert Merge Field button and forgot to insert the field for city, you would see the error in the document. To correct the error, make sure you do this in the main document.

Step by step — Check for Errors

GET READY. USE the Reception Letter document that is open from the previous exercise.

1. In the Preview Results group, click the Check for Errors button. The *Checking and Reporting Errors* dialog box opens (see Figure 7-11).

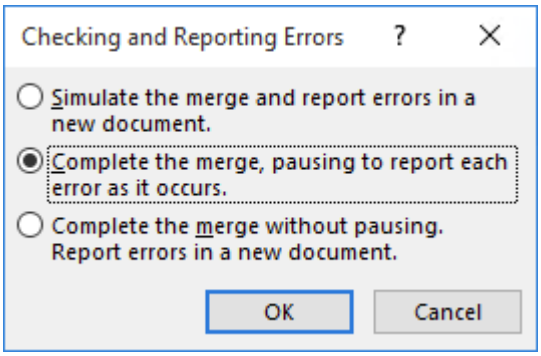


Figure 7-11
Checking and Reporting Errors dialog box

2. Select the first option, Simulate the merge and report errors in a new document.
3. Click OK.
4. A message box appears, indicating that *No mail merge errors have been found* in *Reception Letter*. Click OK.

PAUSE. LEAVE the document open to use in the next exercise.

Step by step — Complete the Merge

GET READY. USE the Reception Letter document that is open from the previous exercise.

1. In the Finish group, click the Finish & Merge button to display the Finish & Merge menu (see Figure 7-12).

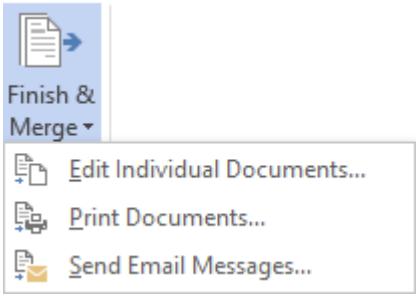


Figure 7-12
Finish & Merge menu

2. Select Edit Individual Documents. The *Merge to New Document* dialog box opens as shown in Figure 7-13. This dialog box presents the following options:
   - **All:** Merges all letters to a new document
   - **Current record:** Merges only the record on which your insertion point is positioned
   - **From and To:** Merges a range of records, according to the values you specify in the From and To text boxes.

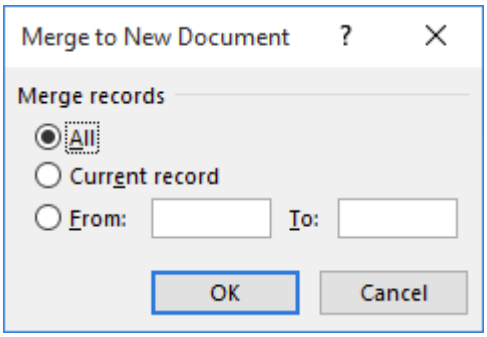
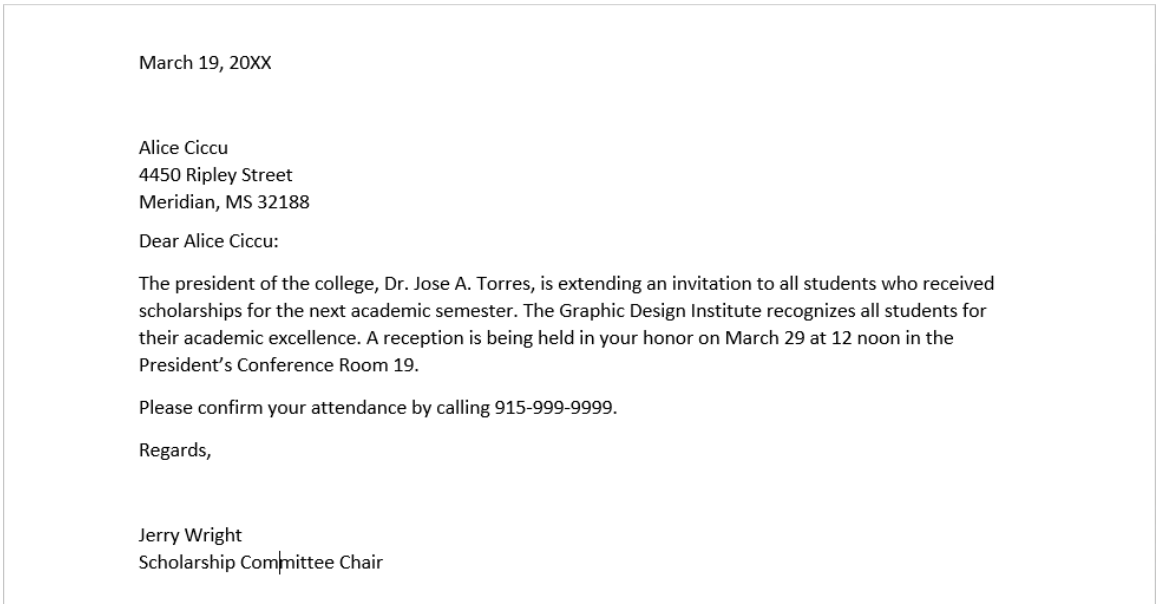


Figure 7-13
Merge to New Document dialog box

3. Select the From/To option.
4. In the From text box, type 3, and in the To text box, type 5.
5. Click OK. Word creates a new document that contains separate letters for records 3 through 5 (see Figure 7-14). Scroll through the document to preview that the document is ready to print.



March 19, 20XX

Alice Ciccu
4450 Ripley Street
Meridian, MS 32188

Dear Alice Ciccu:

The president of the college, Dr. Jose A. Torres, is extending an invitation to all students who received scholarships for the next academic semester. The Graphic Design Institute recognizes all students for their academic excellence. A reception is being held in your honor on March 29 at 12 noon in the President's Conference Room 19.

Please confirm your attendance by calling 915-999-9999.

Regards,

Jerry Wright
Scholarship Committee Chair

Figure 7-14
Sample merged letter

6. SAVE the merged document as Merged Reception Letter in the lesson folder on your flash drive and then CLOSE the file.
7. Make sure Preview Results is disabled and then CLOSE the main document Reception Letter. A message box appears, asking, *Do you want to save changes made to Reception Letter?* Click SAVE.

PAUSE. LEAVE Word open for the next exercise.

When you save the main document with the field codes, you will be able to return to your document and recipient list and use the tools available in the Mailings tab. You can also edit the list of recipients or open another data source to send the same letter to another group of recipients.

Using the Step-by-Step Mail Merge Wizard

It's a good idea to learn the various steps of a mail merge by performing them manually, but if you want to make sure that you complete all of the required tasks, you can use the Step-by-Step Mail Merge Wizard to walk you through the process.

Step by step Use the Step-by-Step Merge Wizard

GET READY. CREATE a new blank document.

1. On the Mailings tab, in the Start Mail Merge group, click the Start Mail Merge drop-down arrow and then select Step-by-Step Mail Merge Wizard. The wizard appears in a separate pane to the right of your document, displaying the Select Document Type page (see Figure 7-15).

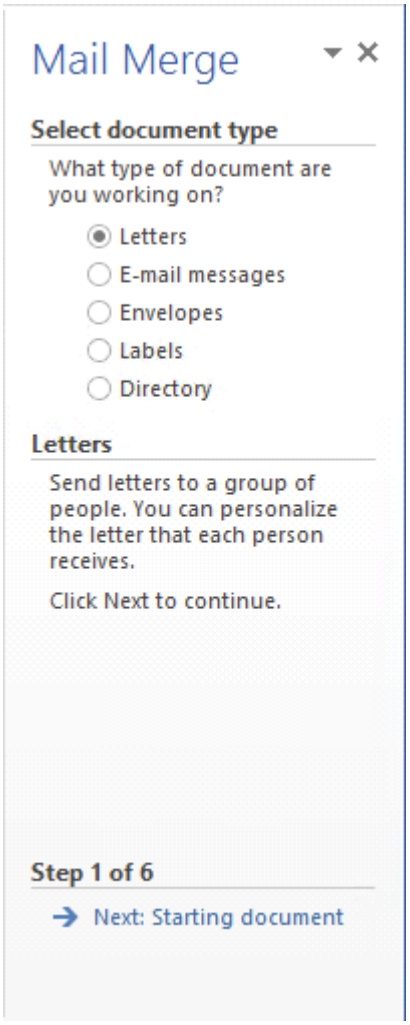


Figure 7-15
Select document type page in the Step-by-Step Mail Merge Wizard

Take Note
The Step-by-Step Mail Merge Wizard provides an alternate method for completing the same tasks you performed during the manual mail merge setup, earlier in this lesson. In some cases, the wizard uses the same dialog boxes as the manual procedure, while others are different.

2. Select the type of document you want to create, as you did earlier in the Start Mail Merge menu, and then click the Next: Starting Document link at the bottom of the page. The Select Starting Document page appears (see Figure 7-16). On this page, you specify whether to work with the currently open document, open another existing document, or create a new one from a template.

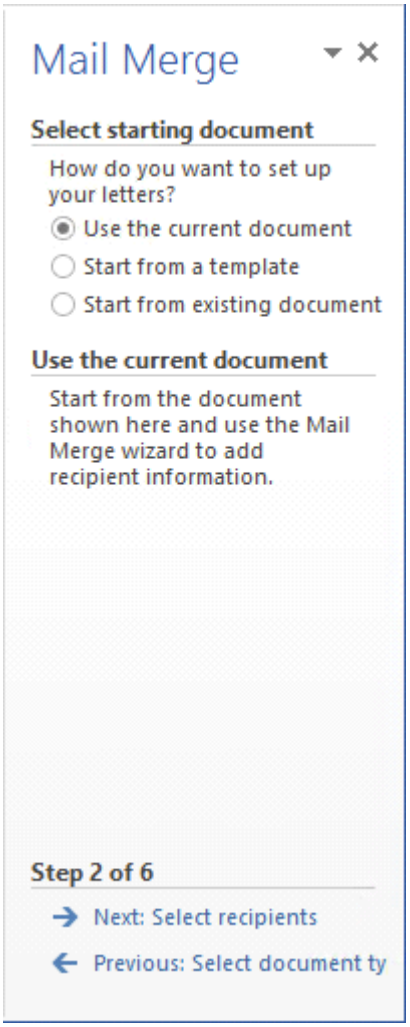


Figure 7-16
Select starting document page in the Step-by-Step Mail Merge Wizard

3. Select a starting document option and then click the Next: Select Recipients link. The Select Recipients page appears (see Figure 7-17). On this page, you specify whether you want to use an existing file as your data source, use your Outlook contacts, or type a new list of recipients. Selecting the Use an existing list option displays the same Select Data Source combo box you saw earlier in the Select Recipients procedure. The Edit recipient list link opens a *Mail Merge Recipients* dialog box, in which you can search for and select individual records in your data source.

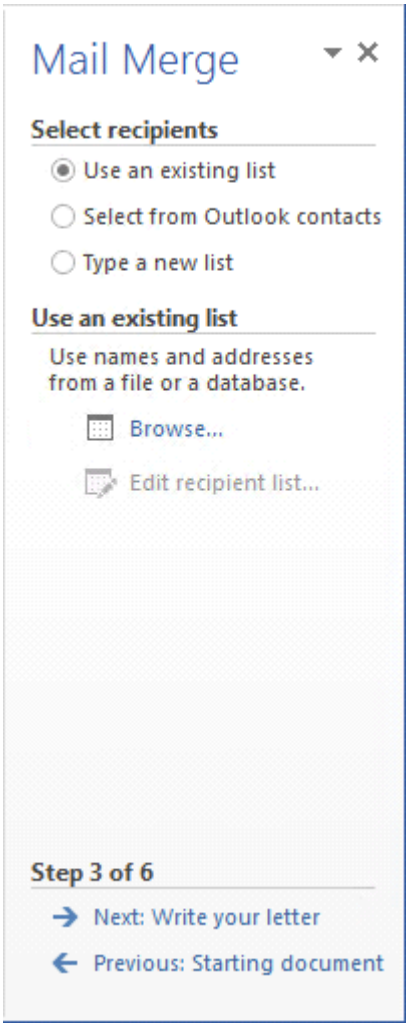


Figure 7-17
Select recipients page in the Step-by-Step Mail Merge Wizard

4. Select a data source for your recipients list and then click the Next: Write your letter link. The Write your letter page appears (see Figure 7-18). On this page, while typing your letter, you can use links to insert an address block, a greeting line, and other information from your data source, just as you did earlier using the buttons in the Write & Insert Fields group on the ribbon. As in the manual procedure, you can correct the mapping of the data fields to your inserts, if necessary, using the *Modify Address Block* dialog box and the *Modify Greeting Line* dialog box.

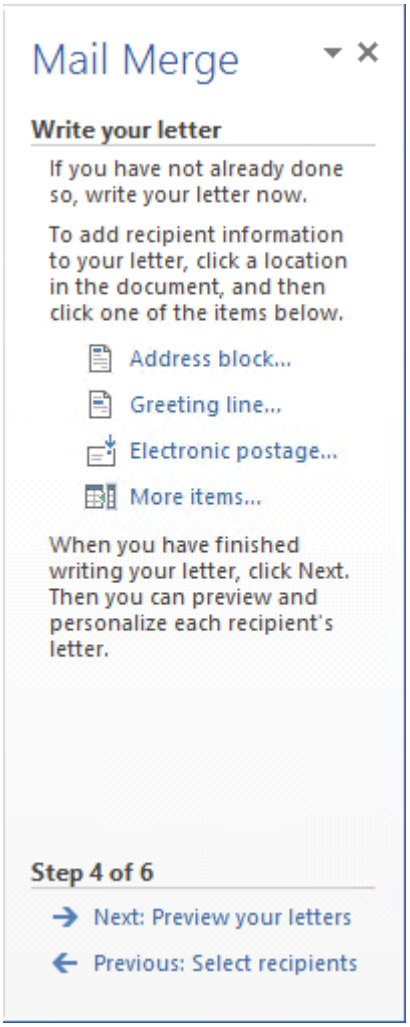


Figure 7-18
Write your letter page in the Step-by-Step Mail Merge Wizard

5. When you have finished creating your letter, click the Next: Preview your letters link. The Preview your letters page appears (see Figure 7-19). From this page, you can display each of the letters your merge will create, using the arrow buttons to scroll through them. You can also search for a specific recipient and edit your recipient list, if necessary.

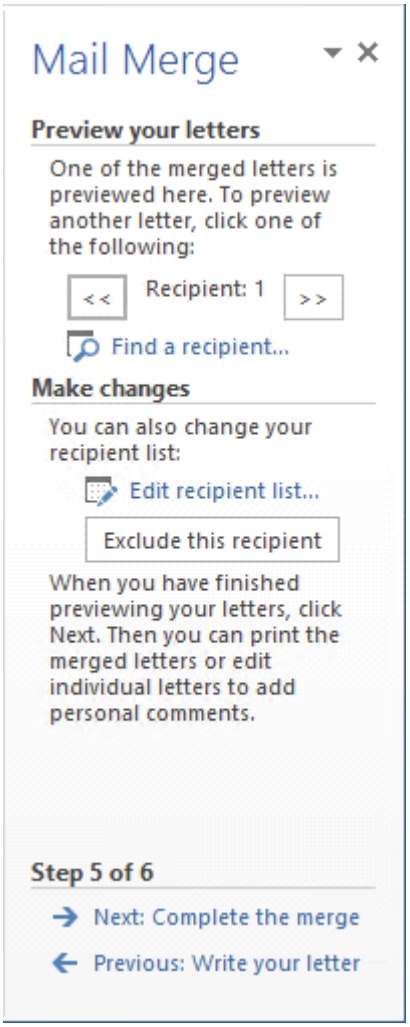


Figure 7-19
Preview your letters page in the Step-by-Step Mail Merge Wizard

6. When you have finished previewing your letters, click the Next: Complete the merge link. The Complete the merge page appears (see Figure 7-20). On this page, you can send the merged letters directly to your printer or click Edit individual letters to open the Merge to *New Document* dialog box you saw earlier. As before, this enables you to create a new document containing some or all of your merged letters.

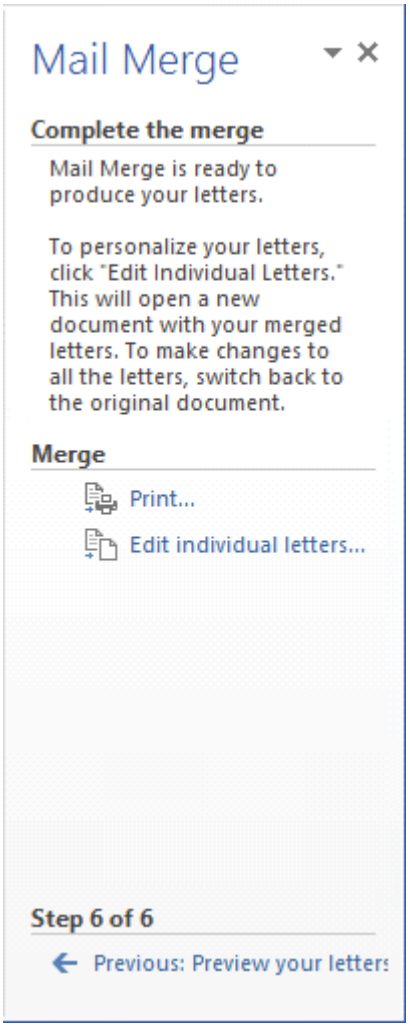


Figure 7-20
Complete the merge page in the Step-by-Step Mail Merge Wizard

7. Once you have completed the six steps of the wizard, you can save your original main document for later use with a different recipient list or save the merged document containing all of your letters.
8. CLOSE the Mail Merge pane.

PAUSE. CLOSE the document. **LEAVE** Word open for the next exercise.

Merging a Document with Different Data Sources

Previously in this lesson, you learn to perform a mail merge using a Word document and an Access database as the data source. However, you can use other data sources in a mail merge, including Word tables, Excel workbooks, and Outlook contact lists. Each of these different formats includes fields—name, address, city, state, zip code, and so on. If the format of the data source is not correctly recognized by Word, then you can use the Match Fields button to correct any errors.

In the next exercise, you learn to merge an existing letter with different data sources, both manually and by using the Step-by-Step Mail Merge Wizard.

Step by step **Merge a Letter with a Table**

GET READY. OPEN the Scholarship document from the lesson folder.

1. On the Mailings tab, in the Start Mail Merge group, click the Start Mail Merge button. Choose Letters.
2. In the Start Mail Merge group, click the Select Recipients button to display the menu.
3. Select Use an Existing List. The *Select Data Source* combo box appears. Locate your flash drive and navigate to your data files for the lesson folder.
4. OPEN the Student Listing data source file from the lesson folder. The Student Listing file is a Word document containing a table with fields as headers and records displayed within the table.
5. In the Scholarship document, at the insertion point, type November 28, 20XX. Press Enter twice.
6. In the Write & Insert Fields group, click the Address Block button to open the *Insert Address Block* dialog box. Notice that the preview area does not display the street address.
7. Click the Match Fields button to correct the problem. The *Match Fields* dialog box appears, as shown in Figure 7-21.

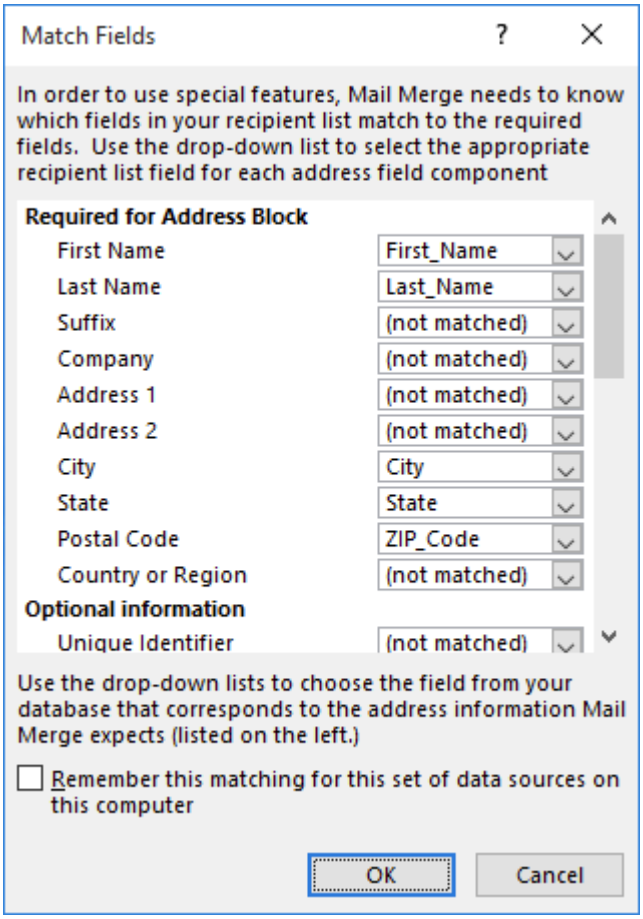


Figure 7-21
Match Fields dialog box

8. Under *Required for Address Block*, Address 1 displays as *Not Matched* because the

field heading in the table is listed as Address Line and does not directly match the field name in the address block in Word.

9. Click the drop-down arrow next to Address 1, select Address_Line, and then click OK to close the dialog box. Review the preview area and notice that the problem has been corrected and the address is now displayed correctly.
10. Click OK to close the *Insert Address Block* dialog box. Press Enter once
11. Click the Greeting Line button. The *Insert Greeting Line* dialog box appears.
12. Change the punctuation to a colon and then click OK.
13. Click the Preview Results button and notice that the spacing in the Address Block needs to be formatted correctly. Click the Preview Results button again to see the field codes.
14. Select the «Address Block» and, on the Layout tab, in the Paragraph group, decrease the Spacing Before setting to 0.
15. In the Page Setup group, click the Margins button. The *Page Setup* dialog box appears, with the Margins tab selected.
16. Change the top margin to 2" and the left and right margins to 1". Click OK to close the dialog box. Preview the results before finishing the merge.
17. On the Mailings tab, in the Finish group, click the Finish & Merge button and then click Edit Individual Documents. The *Merge to New Document* dialog box appears.
18. In the *Merge to New Document* dialog box, keep the defaults and then click OK. A new Word document appears containing individual letters for all of the recipients in the data source.
19. SAVE the document as Merged Academic Honors Scholarship in the lesson folder on your flash drive and then CLOSE the file.
20. Make sure you turn off Preview Results so that the field codes are displayed in the main document.
21. SAVE the main document as Academic Honors Scholarship Letter in the lesson folder on your flash drive and then CLOSE the file.

PAUSE. LEAVE Word open for the next exercise.

In the next exercise, you learn to merge a letter with an Excel data source using the wizard, Ribbon, and insert field codes to complete the mail merge process.

Step by step **Merge a Letter with Excel**

GET READY. OPEN the Scholarship document from the lesson folder.

1. On the Mailings tab, in the Start Mail Merge group, click the Start Mail Merge button, and then select Step-by-Step Mail Merge Wizard to open the Mail Merge pane.
2. In the *Select document type* section, Letters is the default. Click Next: Starting document.
3. Select the Use the current document option and click Next: Select recipients to advance to the next step.
4. In the *Select recipients* section, click Browse and, in the Select Data Source combo

box, locate the Student List (Excel) file in the lesson folder on your flash drive.

5. Click Open. The *Select Table* dialog box appears (see Figure 7-22).

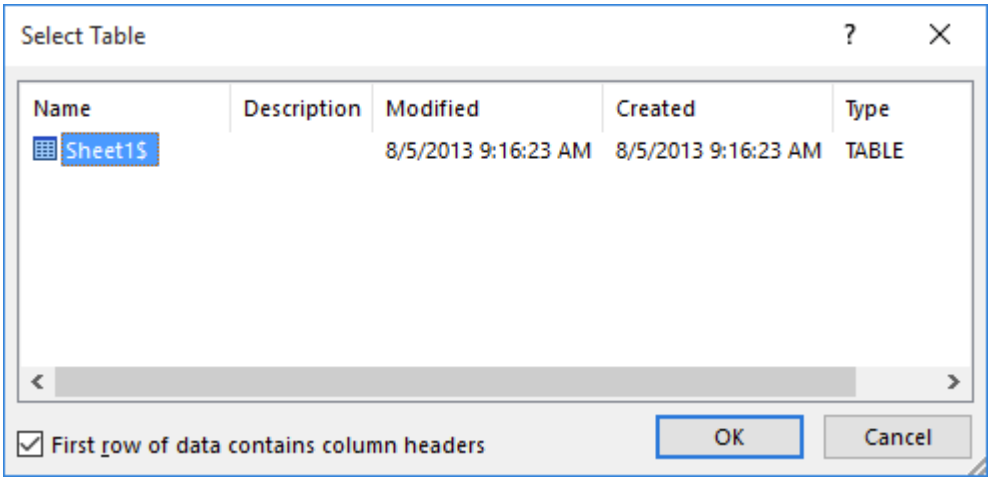


Figure 7-22
Select Table dialog box

Take Note
The student files for this lesson include two source files containing recipient data. One is a Microsoft Access database called *Student List (Access)* and one is a Microsoft Excel spreadsheet called *Student List (Excel)*. The main difference between the two in the mail merge process is the dialog boxes that appear after you select the recipient file. Excel files generate a Select Table dialog box first, in which you can select a specific table from the workbook, if it contains more than one. Access files proceed directly to the Mail Merge Recipients dialog box you saw earlier in the lesson. Be sure to select the correct file for each of the exercises in this lesson.

6. The selected state of the First row of data contains column headers checkbox indicates that Word automatically recognizes the column headings in the selected worksheet. Click OK. The *Mail Merge Recipients* dialog box appears.
7. Notice that in the Data Source box, the Student List (Excel) file name appears. Click OK to close the dialog box.
8. CLOSE the Mail Merge pane.
9. Position the insertion point at the beginning of the document and then type the current date.
10. Press Enter twice.
11. Click the Insert Merge Field button to open the *Insert Merge Field* dialog box (see Figure 7-23).

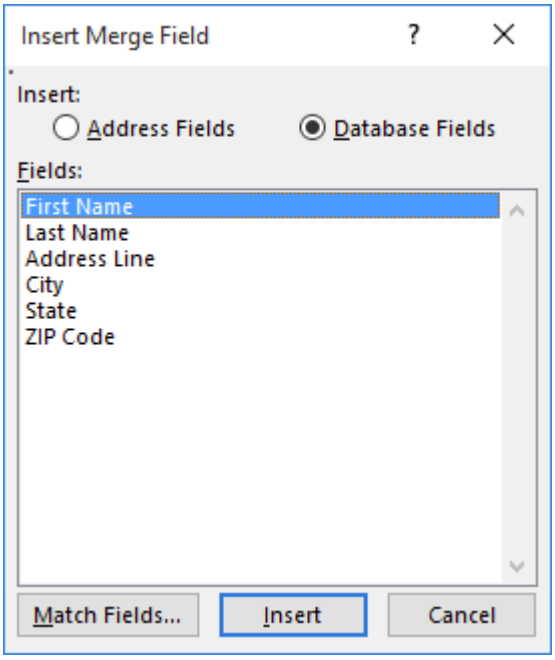


Figure 7-23
Insert Merge Field dialog box

12. Select *First Name* and then click the Insert button to insert the «First_Name» field code in the document.
13. Click the Close button to close the *Insert Merge Field* dialog box.
14. Press the spacebar once and then click the Insert Merge Field drop-down arrow to display the fields (see Figure 7-24). This is another way to insert field codes in a document.

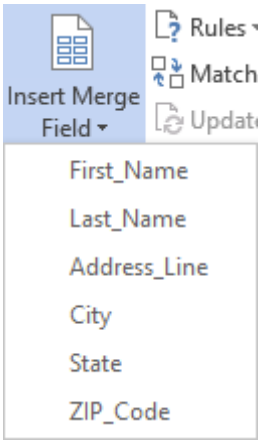


Figure 7-24
Fields menu

15. Select Last_Name to insert the «Last_Name» field code in the document.
16. Press Enter to create a blank line.
17. Click the Insert Merge Field drop-down arrow and then select Address_Line to insert the «Address_Line» field code in the document.
18. Press Enter to create a blank line.
19. Click the Insert Merge Field drop-down arrow and then select City to insert the

«City> field code in the document.

20. Type a comma after «City» and then press the spacebar once.
21. Click the Insert Merge Field drop-down arrow and then select State to insert the «State» field code in the document. Press the spacebar once.
22. Click the Insert Merge Field drop-down arrow and then select ZIP_Code to insert the «ZIP_Code» field code in the document.
23. Press Enter once to create a blank line.
24. Type Dear and then press the spacebar once.
25. Click the Insert Merge Field drop-down arrow and then select First_Name to insert the «First_Name» field code in the document.
26. Press the spacebar once.
27. Click the Insert Merge Field drop-down arrow and then select Last_Name to insert the «Last_Name» field code in the document.
28. Type a colon after «Last_Name».
29. Notice the excess spacing between the lines of the field codes. To correct this, select «First_Name» through «ZIP_Code».
30. On the Layout tab, in the Paragraph group, set the Spacing Before value to 0, change the top margin to 2", and then change the left and right margins to 1". Preview the results before finishing the merge.
31. Click the Finish & Merge button and then click Edit Individual Documents.
32. In the *Merge to New Document* dialog box, keep the defaults and then click OK. A new document appears, with the merged document displaying all of the records in the worksheet.
33. SAVE the document as Merged Academic Scholarship in the lesson folder on your flash drive and then CLOSE the file.
34. Make sure you turn off the Preview Results so that the field codes are displayed in the main document and close the Mail Merge pane.
35. SAVE the main document as Academic Scholarship Letter in the lesson folder on your flash drive and then CLOSE the file.

STOP. CLOSE Word.

Knowledge Assessment

Multiple Choice

Select the best response for the following statements.

1. Which tab contains the commands used to perform mail merges?
   - **a.** Merge
   - **b.** Mailings
   - **c.** Mail Merge
   - **d.** Insert
2. Which of the following is *not* an option for selecting a list of recipients for the mail merge?
   - **a.** Download from an online directory
   - **b.** Type a new list
   - **c.** Use an existing list
   - **d.** Use your Outlook contacts
3. To merge information into your main document, you must first connect the document to which of the following?
   - **a.** An address validator.
   - **b.** A form letter.
   - **c.** A data source.
   - **d.** A website.
4. When mail merge fields have been inserted into a document, Word will automatically replace them with information from a data source when which of the following occurs?
   - **a.** When the main document is saved
   - **b.** When recipients are selected
   - **c.** When merge fields are inserted
   - **d.** When the mail merge is performed
5. When you save the main document, you also save which of the following?
   - **a.** All the data in an Excel spreadsheet
   - **b.** Any other open file
   - **c.** The default return address for Word
   - **d.** The main document's connection to the data source

True/False

Circle T if the statement is true or F if the statement is false.

T F 1. It is a good practice to check for errors before completing the merge process.

T F 2. Word makes the it easy to use an existing list of recipients in a new mail merge document.

T F 3. The Address Block also includes the Greeting Line.

T F 4. Fields correspond to the column headings in an Excel data source.

T F 5. You cannot preview a document before merging.

Projects

Project 7-1: Performing a Mail Merge

In this project, you will complete the mail merge to the list of professional members of the local business community volunteering to judge a state contest for high school business students.

GET READY. OPEN Judges Main Letter from the data files for this lesson.

1. A message box appears, informing you that data from your database will be placed in the document. Click Yes.
2. On the Mailings tab, in the Finish group, click Edit Individual Documents. The *Merge to New Document* dialog box appears.
3. Leave the default option *All* option selected and then click OK. A new document opens containing all four merged letters.
4. SAVE the merged document as 7-1 Judges Merged in the lesson folder on your flash drive and then CLOSE the file.
5. SAVE the main document as 7-1 Judges Main Letter in the lesson folder on your flash drive and then CLOSE the file.

PAUSE. LEAVE Word open for the next project.

Project 7-2: Creating a Mail Merge Document

The marketing representative, Isabel Diaz, has asked you to prepare a short letter to the members of a committee, reminding them of a deadline. In this project, you will use the Step-by-Step Mail Merge Wizard to create the merge document.

GET READY. OPEN the Advertising Letter document from the lesson folder.

1. Set up the letter as the main document for a mail merge.
2. Select the Committee Members file as the recipient's list from the lesson folder.
3. Type May 29, 20XX under the image and then press Enter.
4. Insert the Address Block and Greeting Line. Use the colon in place of the comma.
5. Place your insertion point in the Address Block, and on the Home tab, in the Paragraph group, click the Line and Paragraph Spacing button and then select Remove Space After Paragraph.
6. Place your insertion point in the Greeting Line. In the Paragraph group, click the Line and Paragraph Spacing button and then select Add Space Before Paragraph.
7. On the Mailings tab, click Check for Errors, select the Simulate the merge and report errors in a new document option, and then click OK.
8. Dismiss the results message and then click the Preview Results button.
9. Click Finish & Merge and Edit Individual Documents and then click OK.
10. SAVE the merged document as 7-2 Advertising Merged Letter in the lesson folder on your flash drive and then CLOSE the file.
11. SAVE the main document as 7-2 Advertising Main Letter in the lesson folder on

your flash drive and then CLOSE the file.

CLOSE Word.