

Word: Mail Merge

Form Letters, Labels, Directories



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1.0 Hour

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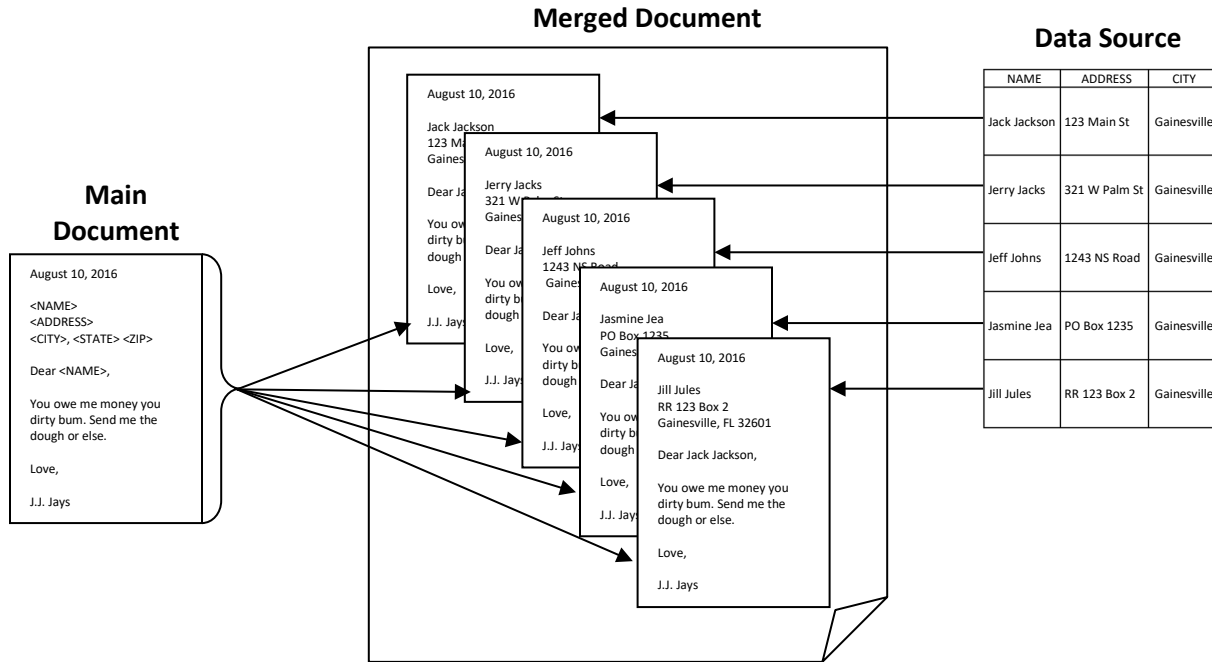
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Mail Merge

Mail Merge is used to create a set of documents such as Form Letters or Mailing Labels. The **Main Document** is the structured format of how you want each result to look. The **Data Source** is a structured list of related data, such as an Excel spreadsheet or Access database. The **Merged Document** will consist of one **Main Document** for each **Data Source** item.



Document Type

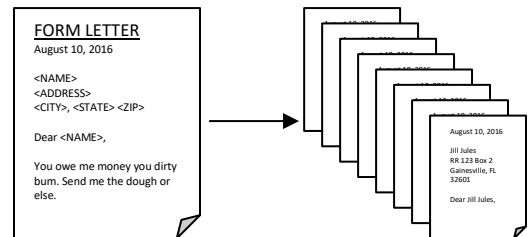
There are five options for the resulting Merged Document.

1. Letters

Create individual letters to each person all at once.

Using the fields (columns) of the Data Source, you can personalize each letter for each record (row).

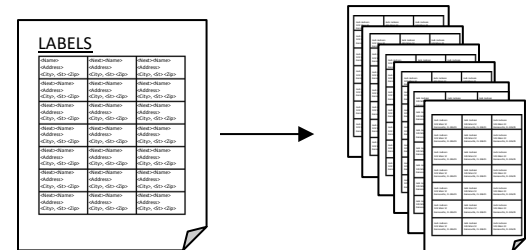
For example, we can list each person's account balance or assignment specific to that individual.



2. Labels

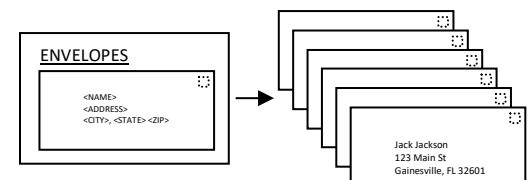
Create labels for a group mailing. This option usually creates a formatted table using predefined sizing based on the product number you choose. Avery 5160 and 5660 tend to be the most common mailing labels.

Among others you can also use this option to create name tags, file labels, tent cards.



3. Envelopes

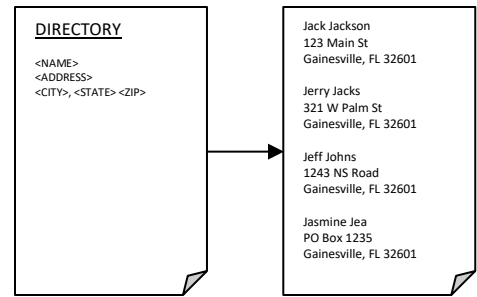
Create a document sized to an envelope based on the product number. The standard is size 10, but it will be listed on the box.



4. Directory

Create a document containing a catalog or printed list of addresses.

This option is unique because there is no break. With a letter or envelopes, the next record (row) is pulled into the merge when it reaches the end of the file and it starts over with the next record. With labels, there is a <<Next Record>> option to begin the next label.



With Directories all the records are brought in at once. If you want the next record to be on the next line, make sure you end your main document with an Enter or two.

This is an underutilized tool. This option can take the data out of the raw data table view and rearrange the data into any format you set up.

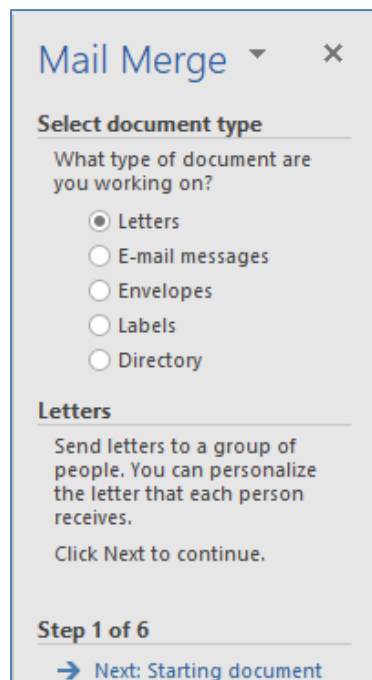
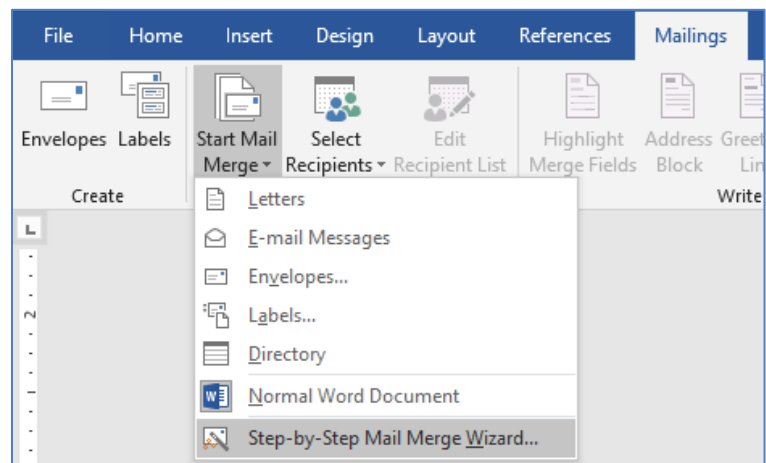
5. E-mail messages

Send e-mail messages to a group of people through Microsoft Outlook. You can personalize the e-mail messages that each person receives using the merge fields. This will be discussed more in the next Mail Merge session.

Mail Merge Wizard

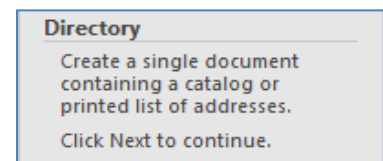
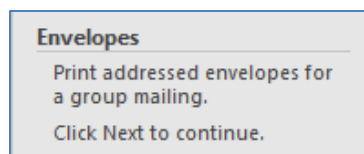
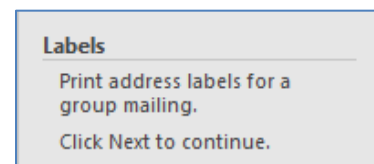
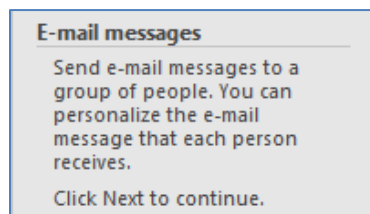
To start a mail merge, go to the **Mailings** tab in the ribbon. The merge tools are only available as you reach each step, so you may wish to use the wizard until you become comfortable with the individual steps.

From the **Mailings** tab, choose **Start Mail Merge** and choose the **Step-by-Step Mail Merge Wizard**.



Step 1 decide the type Document Type.

Letters, Emails, Envelopes, Labels or Directories. Look for the "Next" option at the very bottom of the side pane.

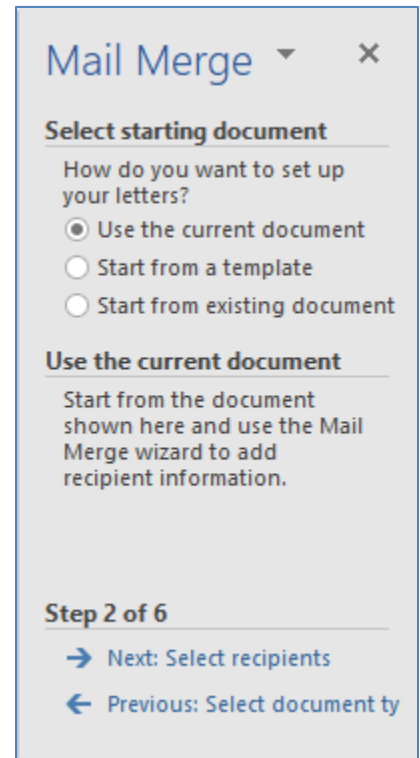
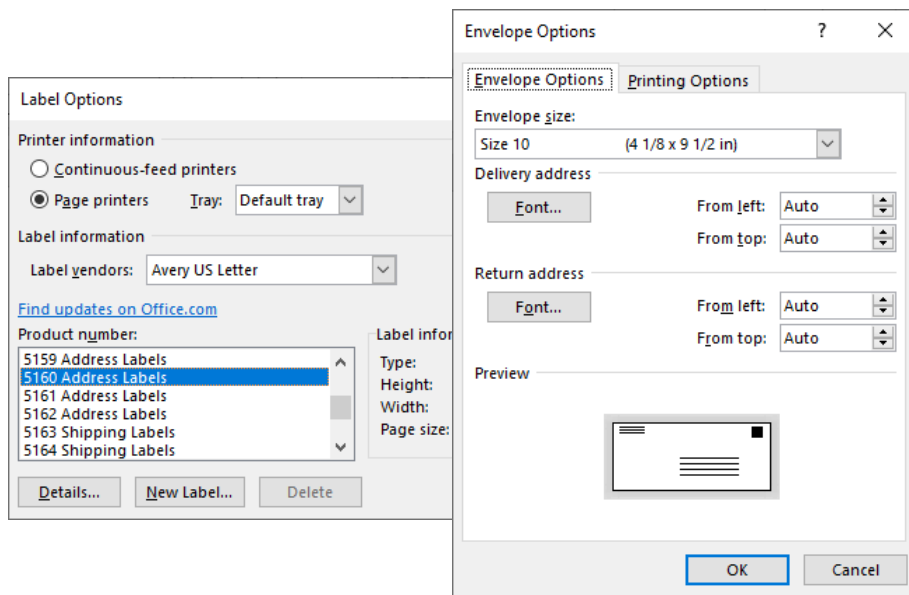


Step 2 select the Starting Document.

Typically, we use the current document, but from here you can open a saved file, or start from a template.

Envelope and Label document types will offer the chance to change the layout. At this point you would choose the label or envelop numbers from the box of labels or envelopes. If you don't have the original box, there is an option to build your own.

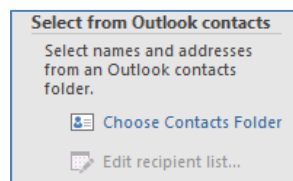
Look for the "Next" option at the very bottom of the side pane.



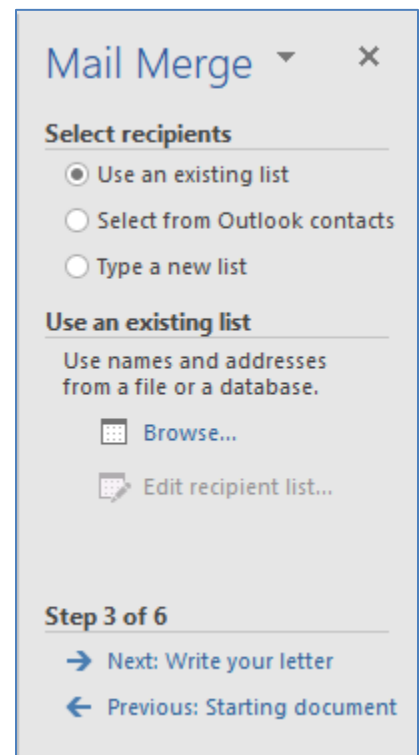
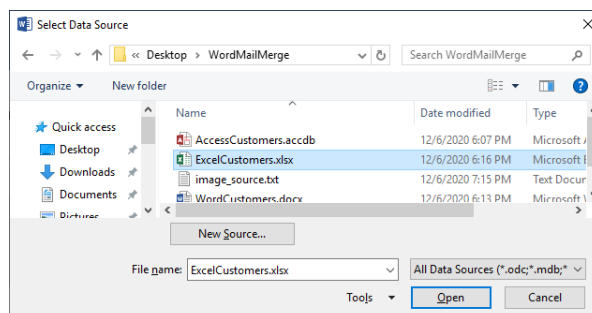
Step 3 Select the Recipients, the Data Source.

Most of the time we use an existing list, typically an Excel file. Data sources can come from multiple data types including tab delimited text files, CSV files, Excel workbooks, Access databases, and even other Word documents.

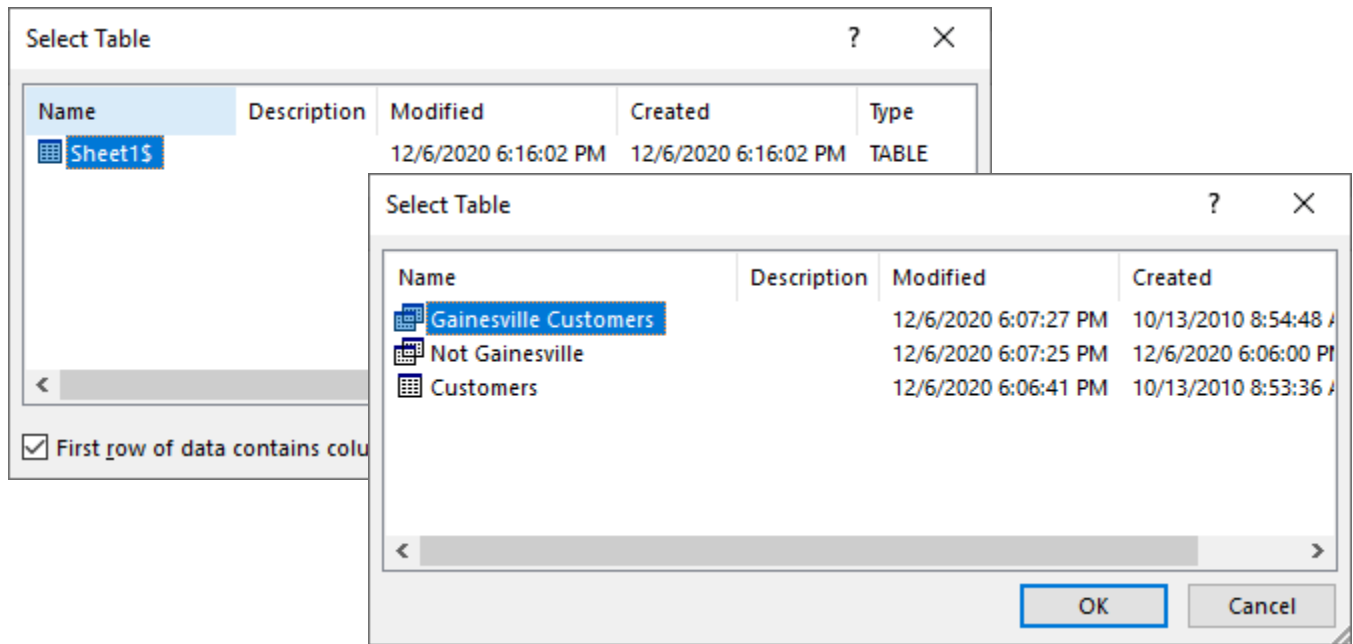
If you have been very conscientious with your Outlook contacts you may choose this option. Since you can keep the addresses of contacts in Outlook, this is not limited to the email document types.



Usually we have an "existing list". Word defaults to a Data Sources folder. Browse for the file you plan to use and click the **Open** button.

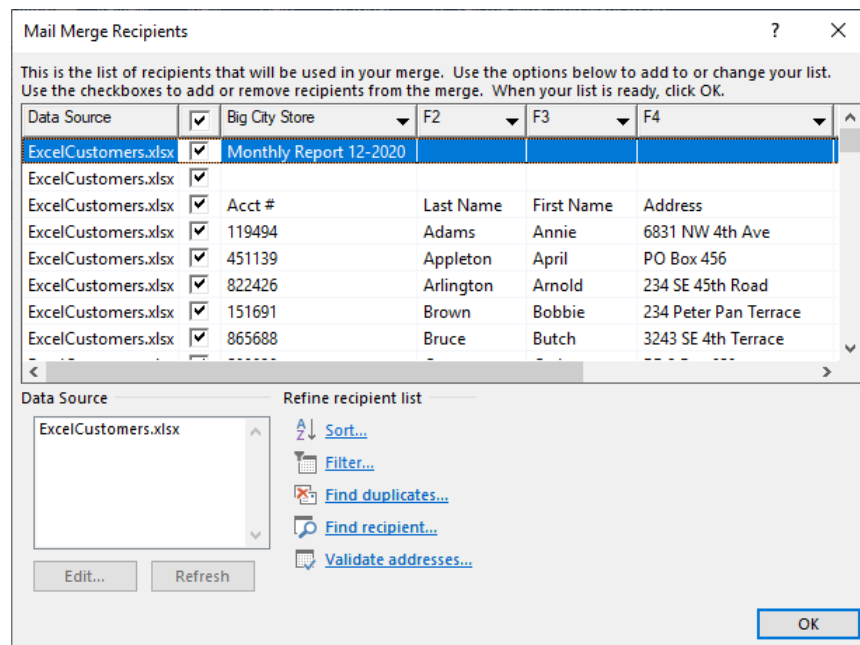


Once you have chosen the data source file you may need to make choose which "table" contains your data. For example, you will need to select the worksheet within an Excel file, or the query within an Access file.



Once you click the **OK** button, you will see the data. Notice the data source below needs to be adjusted.

The first line of your data source from a text, CSV, Word, or Excel file, should be the titles of your dataset. Since this Excel file has a header above the title row, there are strange headings like F2, F3...



This is also the screen where you can set up a custom Sort and Filter options. I highly recommend you clean up your data in Excel before you bring it into Word. While these options exist here, they are difficult to work within Microsoft Word.

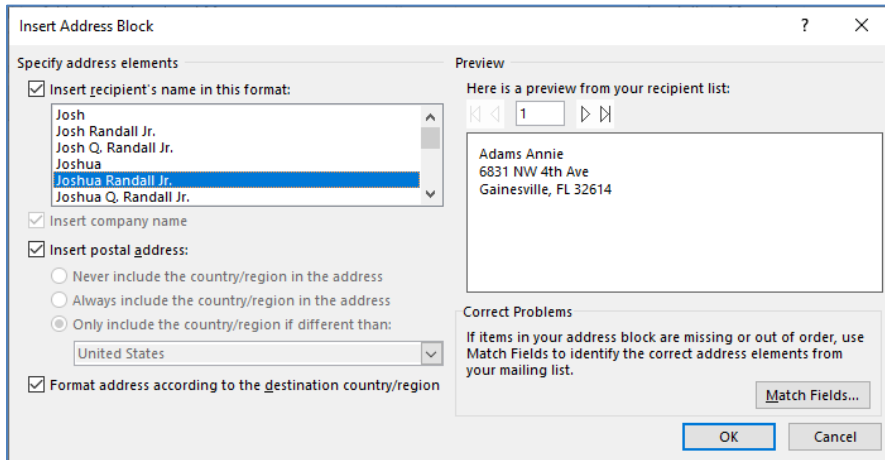
Step 4 Write your Letter

For envelopes and labels, this step is called Arrange your envelopes or Arrange you Labels.

All document types have the options:

Address Block

Since most mail merges are set for Form Letters and Labels, the standard Address block is a preset option. The left side determines how the name will appear on the label, the right side shows a preview of how the first label will appear. Notice there are previous and next buttons to scroll through the different records in the data source file.



If the preview doesn't look right, or is missing a data point, choose the **Match Fields** option.

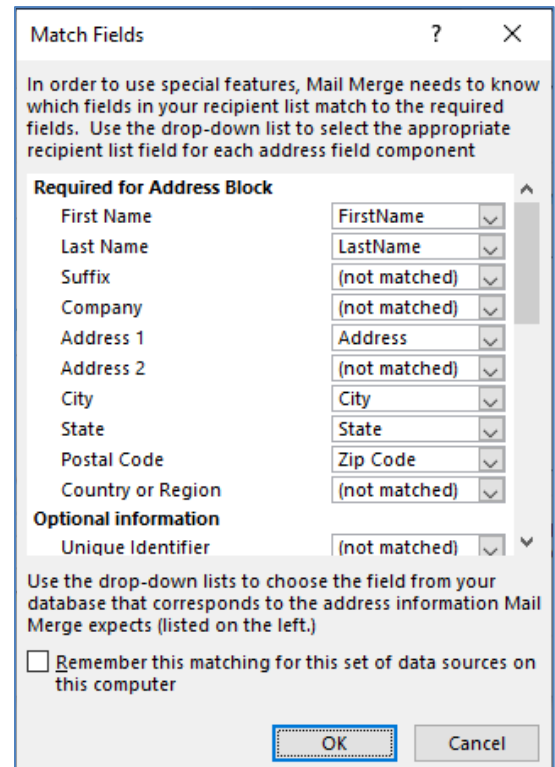
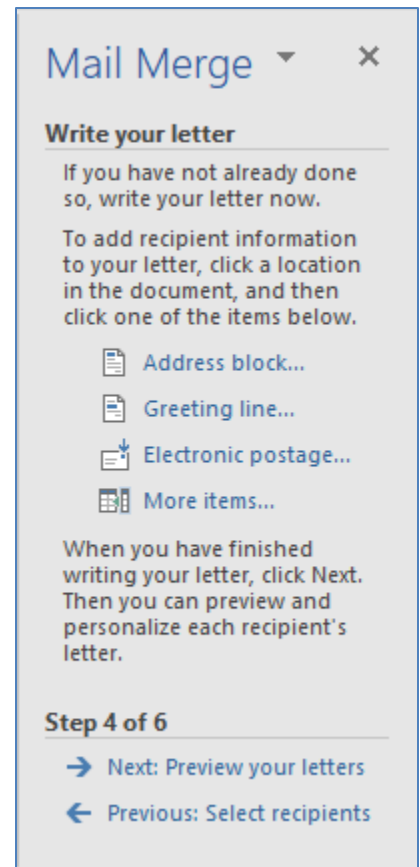
From here you can choose your field names to back the names Word is expecting.

For example, if the State column was abbreviated in the data source file to ST I would see it missing from the preview.

In the **Match Fields** window, click on the (not matched) menu and choose the field name (column) from the original data.

If you plan to use this dataset for more than one Mail Merge document, you may wish to check the **Remember this matching for this data source on this computer**.

The Match Fields option is also available on the Mailings tab, so if you don't notice the missing field until later, you can fix the option even after the address block has been created.



Greeting Line

We start most letters with a "Dear" or "To" greeting. If a name is missing it would be awkward to see a letter that starts:

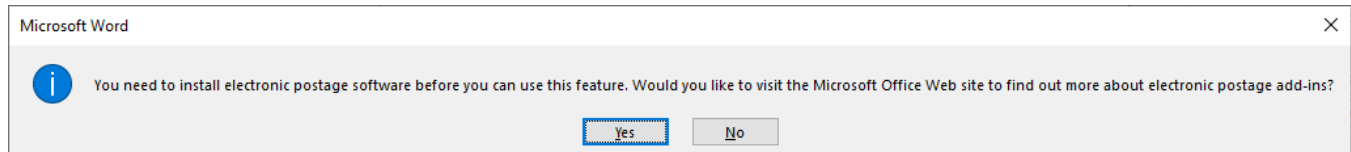
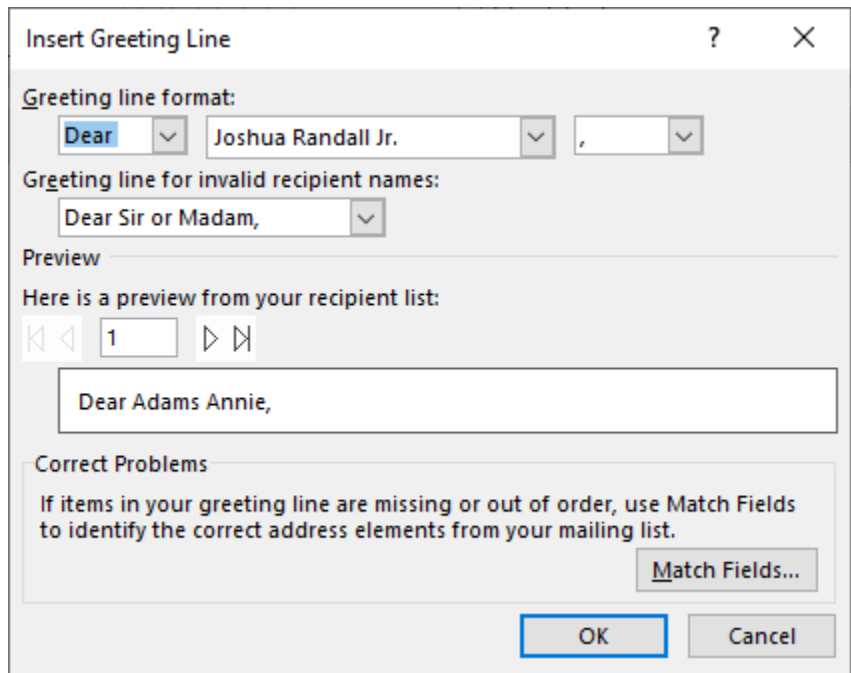
Dear ,

Using the built in Greeting line give an option on what to do if the fields you need for your opening are missing.

This window also offers the **Match Fields** option.

Electronic postage

If you have an electronic postage software installed, you can use this option.



More Items

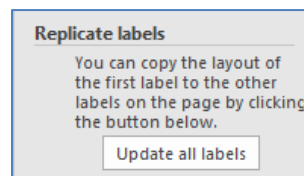
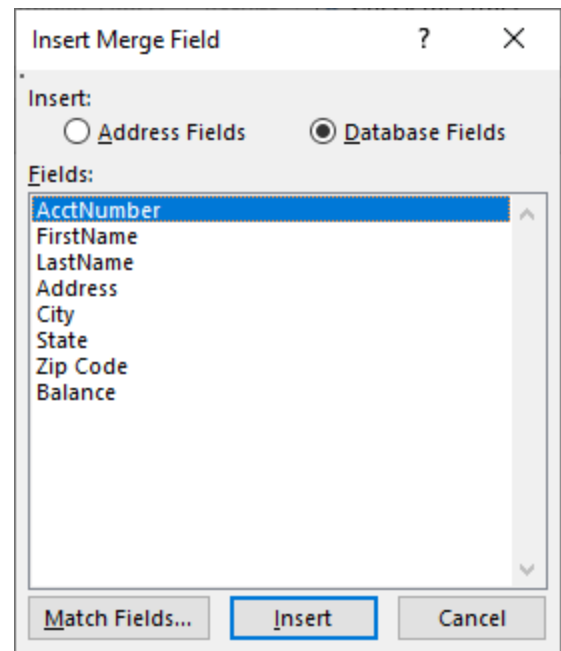
If you are sending the same letter to each of your recipients the Address block and Greeting lines may be enough, but if you want to customize the body of the message you may want other fields (columns) from your original dataset.

Examples would be due dates, and account balances. The More Items window will list all of the fieldnames in your dataset. As mentioned earlier, if Word does not like the fields names you may see generic column headings like F1, F2, F3...

Place your cursor where you want the field (column value) to appear and open the Insert Merge Fields window by clicking the **More Items** option. Click the Insert button. You can insert multiple fields at once, but you cannot change the cursor location, or type other text while this window is open.

Replicate Labels

When you set up labels through the wizard, you only build the first label. Once it appears the way you desire, click the Update All Labels option (it will only be on this step for Labels. If you edit the label, remember to click the update button again to change all the labels in the document.

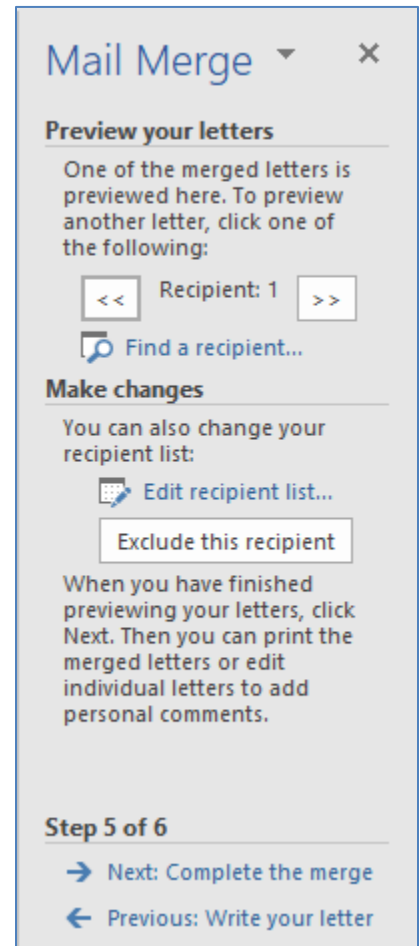
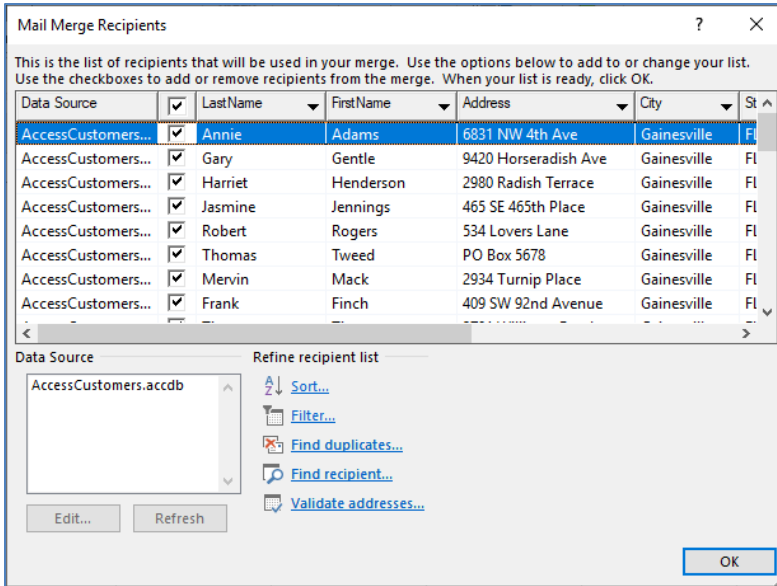


Step 5 Preview

This step will display the current record (recipient). Use the previous and next buttons in the Mail Merge Pane to view different recipients.

If you are using labels, you will see all the labels shift as you move through the list. The Edit Recipient List reopens the Mail Merge Recipients window.

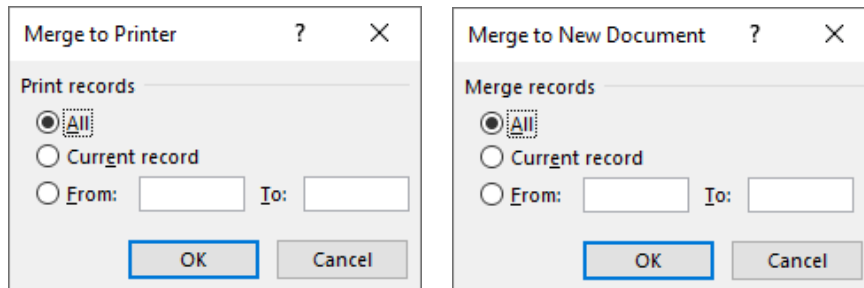
To Exclude a recipient, use the button in the pane, or uncheck the boxes within this list.



Step 6 Complete the Merge

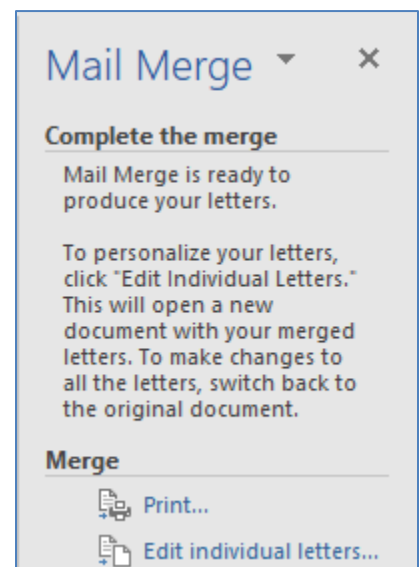
This step will create the final document, pulling all the records (rows, recipients) into each entry in the main document.

You can send the file directly to the printer, but it's highly recommended to edit the individual options first. One can never know when a printer will jam.



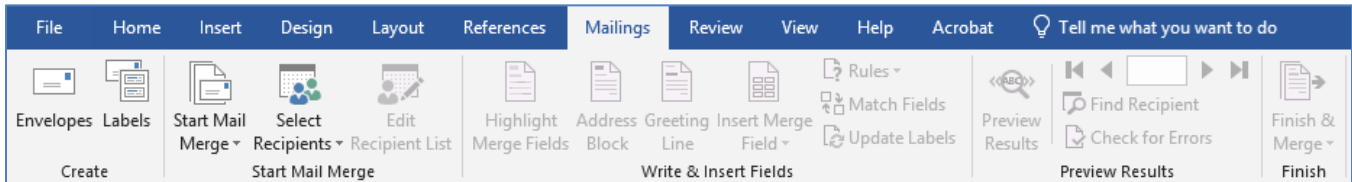
Either way you can choose to send All the records, the Current one, or choose a set of consecutive records.

Emails have another option to set the subject of the email and choose the field from the data source that contains the recipients email address.

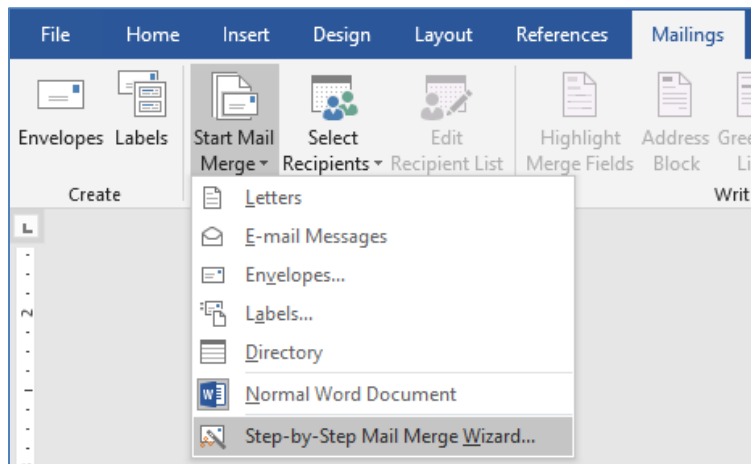


Building a Merged file without the Wizard

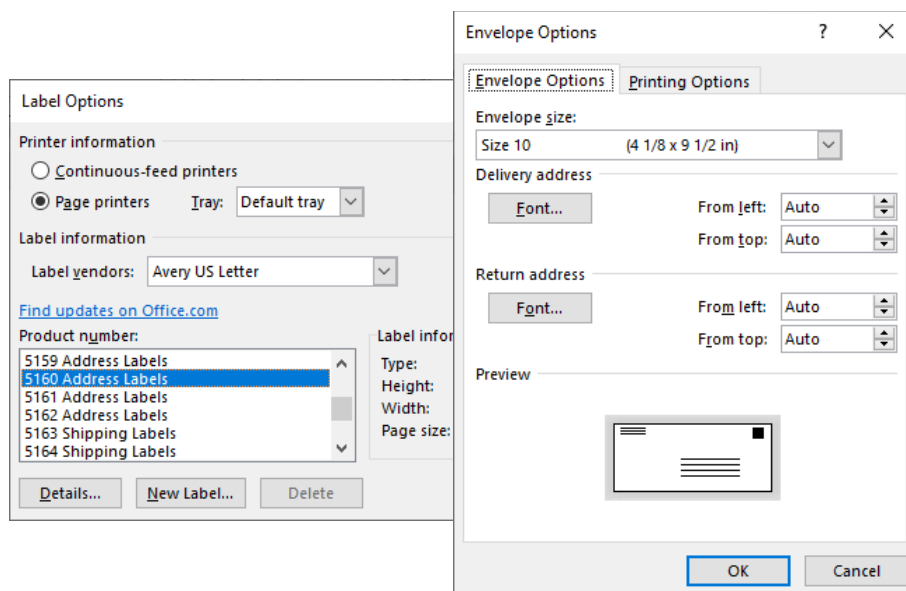
As mentioned earlier, the Mailings tab will mostly be disabled until you begin your merge.



Step 1 is to choose the document type. You can skip this step if you are creating Form letter, as that is the defaulting Mailing type. But if you want a different document type, choose the option from the Start Mail Merge menu on the Mailings tab.

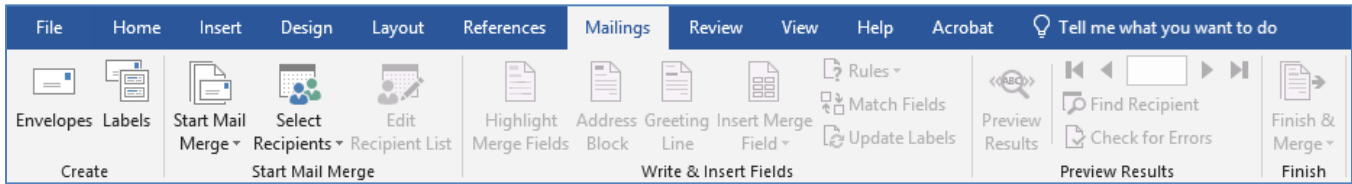


Like the wizard, if you choose an Envelope or Label you will be prompted to choose the product number and Word will change the document layout to match.

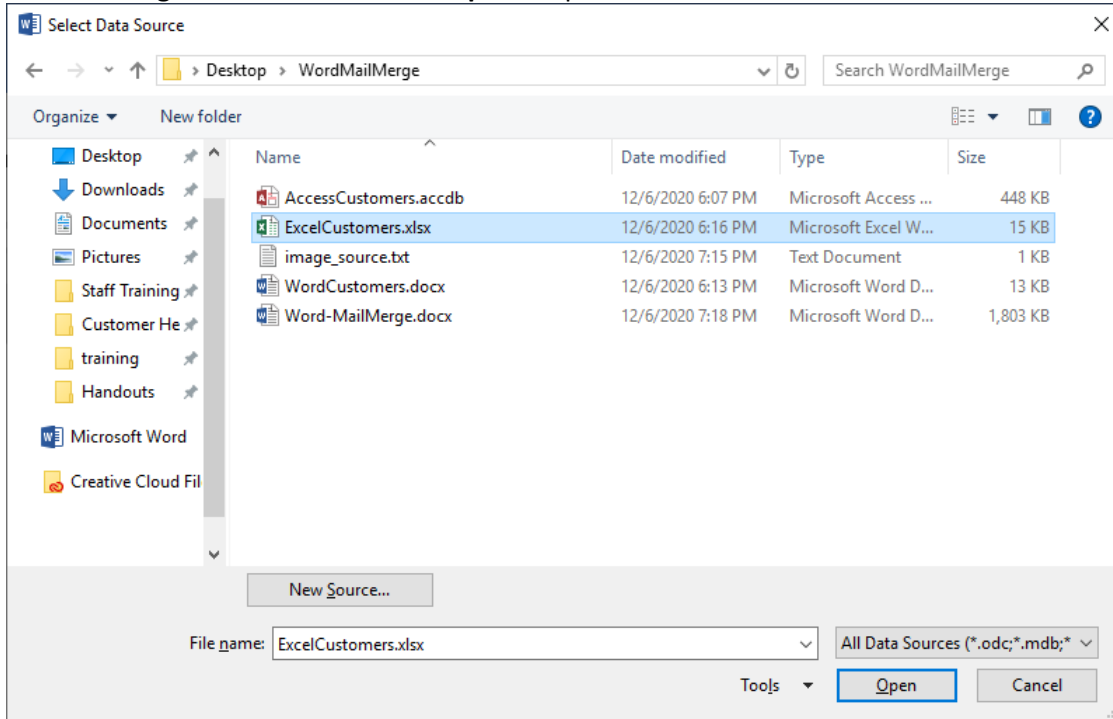


In the wizard, *Step 2* selects the starting document. If you are building this document without the wizard, Word assumes you are already in the file you plan to use as your Main Document.

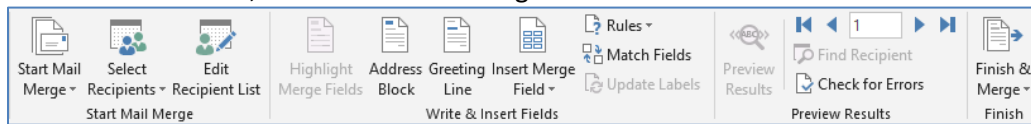
Step 3 selects the data source, the recipients. Notice it's the only other button currently available within the Merge tools in the Mailings tab of the ribbon.



Choose **Use an existing List** from the **Select Recipients** option and Browse for the Data Source file.



Once you choose the data source, the rest of the Mailings tab will become available.

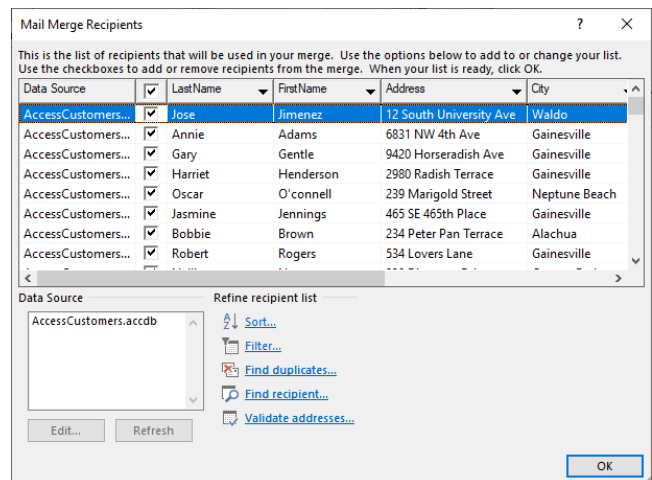


The wizard automatically shows the records when you choose a data source.

If you want to see the Mail Merge Recipient lists, click on the Edit Recipient list button.

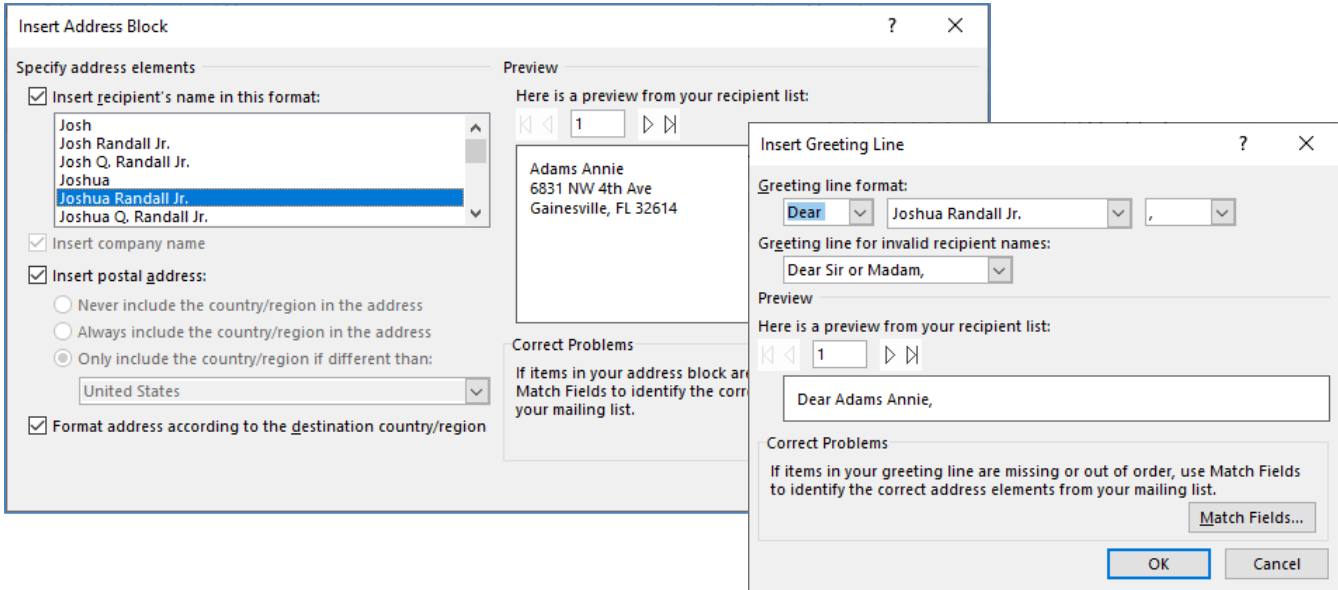
Remember, you will find the Sort and Filter options in this window.

If you uncheck the recipients they will be excluded from the final merge.



Step 4 of the wizard was to build the document, and Step 5 was to Preview. Once the recipient list is selected you can use any of the **Write & Insert Field** tools, and you can **Preview the Results** at any time.

Like the wizard there are options to insert **Address Blocks**, **Greeting Lines**, and other **Merge Fields**. If you use the drop-down list to insert your fields, you can skip having to open the field list every time you need a field.



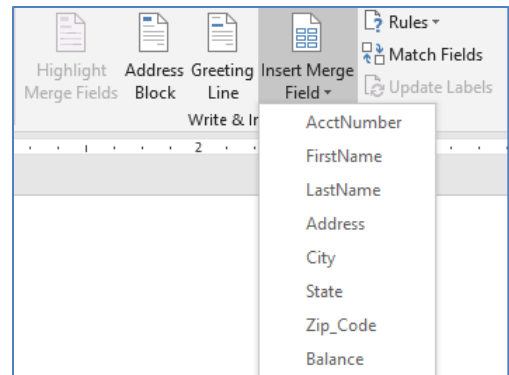
The drop-down list to insert fields, skips the need to open the **Insert Merge Field** window each time you need a field.

Match Fields button is in this group.

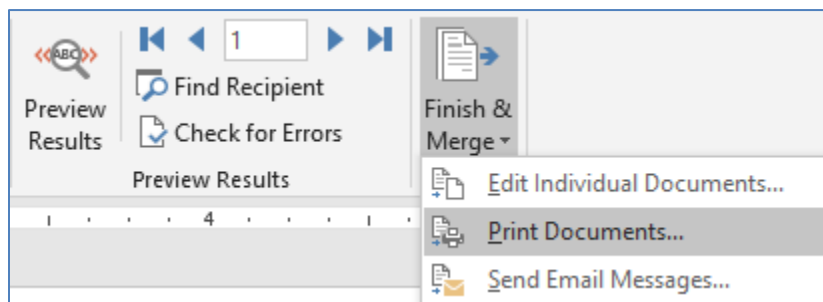
As is the **Update Labels**, which will only be available when the document type is set to Labels.

The Preview group has the Previous and Next record buttons to allow you to scroll through the recipients.

If the document looks "weird" try turning off the preview and then turning it back on.

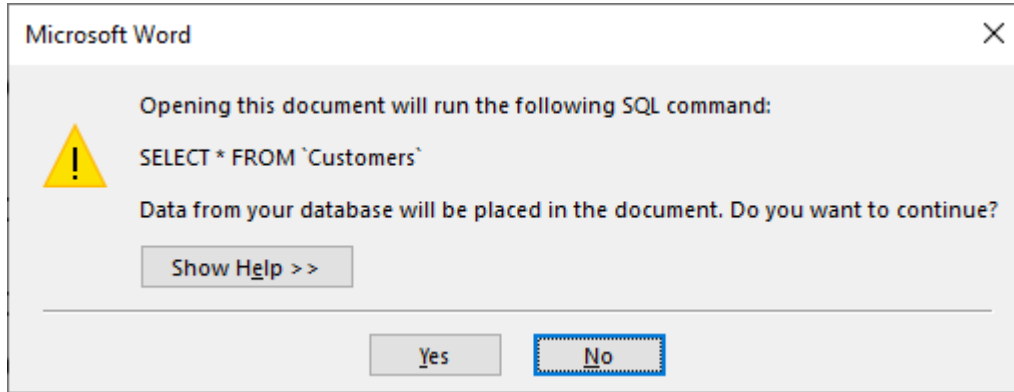


Step 6 of the wizard was to Finish and Merge. This is also the last step available in the **Mailings** tab.

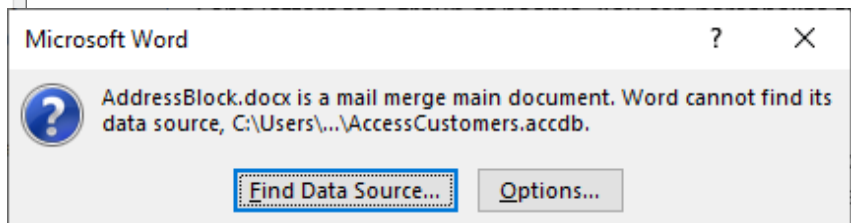
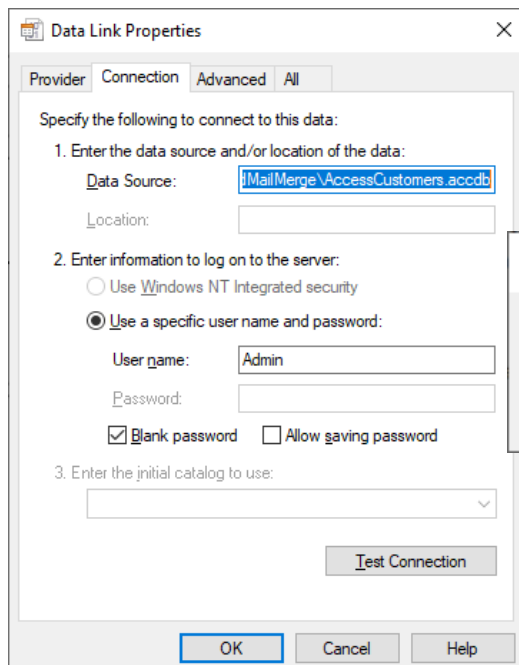
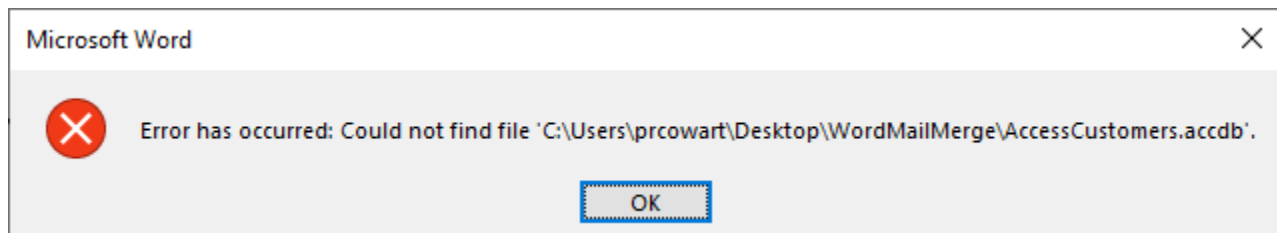


Opening the Main Document

After you set up the Main Document, when you open it you will get a message like this:



- If you click **No** you will not be able to use your Merge tools. Use this option if you need to change the data source.
- If you click **Yes**, Word will continue still attached to the original data source (recipient list)
 - If Word cannot find the original files you will get a series of error messages and will eventually be given a chance to search for the data source. I recommend cancelling the messages and openin the file again, choisin the No option and resetting the source yourself.



Things to Remember

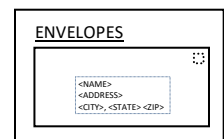
Labels

- Set the first label only and then click on the **Update Labels** button in the **Merge Wizard** pane, or the **Write & Insert** group on the **Mailings** tab.
- Do not delete the <<Next Record>> option, that triggers Word to find the next row (recipient) in the record set.
- Labels are typically set up in a table. The first time you create labels in Word, you will not see the gridlines defining the cells of the table. If you want to see them make sure you are on the first label, go to the Table Tools **Layout** tab, typically it'll be the last tab in your ribbon. The second button should say View Gridlines.



Envelopes

- Word has a text box available for the mailing address, but it's invisible. Click near the middle, a little past half way down to find the text box where the mailing address should appear.



Directories

- There's no natural break in a directory. If you want the next record to start on the next line, make sure your last character is a paragraph break (an Enter).
 - Directories often use columns or tab stops to organize the data.
 - Columns can be set on the document Layout tab.
 - Tab stops are set through the Paragraph window. Right-click and choose Paragraph, click on the Tabs button in the bottom left corner of the window. This is also where the dot leader is set.
- Total..... \$123

General

- The buttons on the **Mailings** tab are available any time after you choose your recipient list. Even if you have started with the wizard, you can use the buttons in the **Mailings** tab to **Edit the Recipient List**, add in Fields, Modify the **Match Fields**, and turn on the **Preview Results** at any time.
- You will not be able to edit the original data source in its original program while working in the main document. This is because Word has the file "Open". You must close the file in Word to edit the data in its original program.
- Once you merge your Main Document with your Data Source (recipient list), Word will change the title of the resulting file. If you get confused between your main document and the resulting file, look at the title bar in the Word window.

Letters1 - Word

Envelopes2 - Word

Labels3 - Word

Directory4 - Word

Changing or Removing the Data Source

- You can change the data used in the Mail Merge at any time by changing the Select Recipients menu and using **Use an Existing List**.
- To return the document back to "Normal" so it is no longer a Main Document of merge, choose **Normal Word Document** from the Start Mail Merge List.