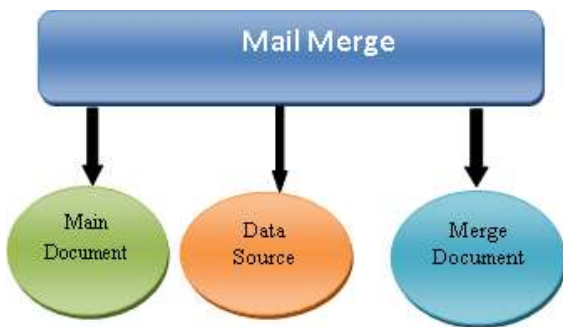# 5

MAIL MERGE

MAIL MERGE: It can be used to create personalized messages automatically for documents such as:

- Marketing emails
- Envelopes
- Mailing labels
- Newsletters
- Custom catalogues
- Form letters and more!

MAIN DOCUMENT: The personalized document (standard letter, envelope or mailing label) is known as main document.

DATA SOURCE: It is the file that contains the names and addresses or any other information.

MERGE DOCUMENT: When you merge the main document with data source a third document is known as merge document.

- Select Mailings →Start Mail Merge Select document type from Mail merge wizard
- Document type can be letters, email, addresses, directory and labels...
- If the letter is open, Mailings → Start Mail Merge → Step-by-Step Mail Merge Wizard.
- A new pane will appear on the right-hand side of your screen. Under the first section that says Select document type → choose Letters.
- You can choose E-mail messages if you want to send your letter via an email.

  Then click on Next: Starting document at the bottom to continue.
- Use the current document option to use your current letter for the task.
- If your letter is in another Word file, click the Start from existing document to open that file. Then click on Next: Select recipients at the bottom.
- Select recipients → select Use an existing list. You can select the Type a new list option if you don't have your recipients' data gathered.

- Then click Browse to import your Excel spreadsheet.

- Select the recipients you want to use for mail merge.
- Sorting lets you sort your records in ascending and descending orders. Filtering lets you compare the fields and filter out the ones you don't need. Finally, click Ok at the bottom.
- Click Next→Write your letter at the bottom.

- Choose the data field you want to add and click Insert at the bottom.
- Click Next→Preview your letters
- Click the left and right arrow icons to view letters for each of your recipients.

  Then click Next→Complete the merge.
- Click Print to print these personalized letters or select Edit individual letters to edit these letters.
- Mail Merge from existing Template
- Open MS-Word and choose a new document or an existing document that you would like to use as a Mail Merge template.
- Click Insert tab → Select Quick Parts→ Field.

- Choose Mail Merge from the Categories list.
- Select Field names→Select Merge Field

- Within the Field Properties section, enter a Mail Merge field in the Field name box.
- Click Ok

DATA SOURCE: If existing database information is not present, then you have to create Data Source.

- Data source using Mail Merge Helper: Mail merge wizard → Select recipients →Type a new list→ Select Create option

- A dialog box appears to create list with new set of data (Title, First Name etc...as Addresses)
- Fill required data fields. Click Ok
- Save As box will appear. Locate the folder and save the file name.

MERGING DOCUMENTS: Once main document and Data Source created, you have to merge the document.

- Click on the location of your letter where to insert the Addresses
- Select Address Book from Mail Merge wizard→Insert Address Block
- Using Address Block, you can select the individual address field.
- Click Office button→Save As

CHECK YOURSELF

1. In the first step of the Mail Merge Wizard, you need to select the ....

   A. recipients' list
   B. starting document
   C. document type
   D. none

2. In Mail Merge, multiple copies of the merged document can't be printed. **(True/False)**

3. You can start 'Mail Merge' by clicking on the .... option in the Ribbon.
   A. Insert
   B. Mailings
   C. Review
   D. None

4. In Mail Merge, the document containing the common text is called.........
   A. Merge Doc
   B. Data Source
   C. Main Document
   D. Additional Source

5. Mail Merge saves time and efforts. The statement is True or False **(T/F)**

STRETCH YOURSELF

1. How do you create and print From letters?
2. Can you use a merge field in the subject box of an e-mail message?
3. How do you perform a mail merge to envelopes?
4. How do you perform a mail merge to labels?

ANSWERS

Check Yourself

1. B

2. False

3. Mailings

4. C

5. True