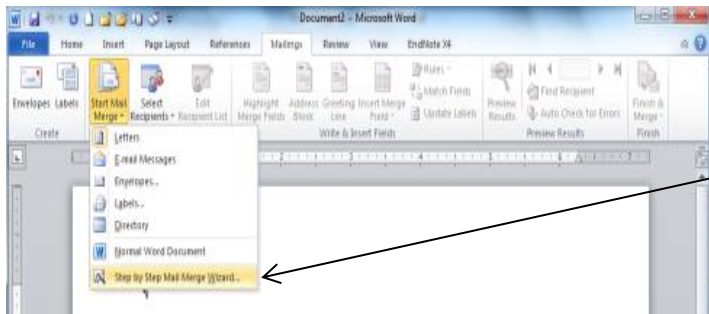


Using Mail Merge in Word 2010

Introduction

The **Mail Merge** feature allows you to write to many different people with the same information which can be modified for each individual. **Mail Merge** involves creating two documents. A **Main Document (Mail Merge File)** and a **Data Source**. Combining these files into a single document automates time-consuming tasks such as **(form) letters, labels, memos and reports**.

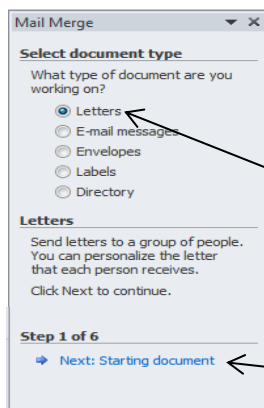
The **Mail Merge** file will hold special symbols (**Mail Merge Fields**), which will substitute the name and address and other relevant information stored in the data file.



➔ From the **Mailings** tab select **Start Mail Merge** and select **Step by Step Mail Merge Wizard**

Performing the merge

Step 1: Selecting document type



A **Task Pane** appears to the right of the document and is visible throughout the entire Mail Merge procedure.

➔ Select the **Letters**

At the bottom of the **Task Pane** (Step 1 of 6)

➔ click on **Next: Starting document**

You are given information on the choices available at each step. When you complete a step, click the **Next** button at the bottom of the **Task Pane** to move forward to the next step. If you make a mistake, click the **Previous** button to retrace your steps.

Step 2: Select Starting Document

You have a choice of using:

The current document

The blank document displayed on screen

Starting from a Template

if you have previously created a template of your choice, would prefer to use one of Word's own Mail Merge templates

Start from an existing document

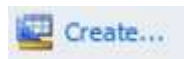
This could be a document that already contains pre-typed text

Choose **Use the current document**

Step 3: Select recipients.

From the three choices in **Select recipients**, choose **Type a new list**

➔ Click on **Create**



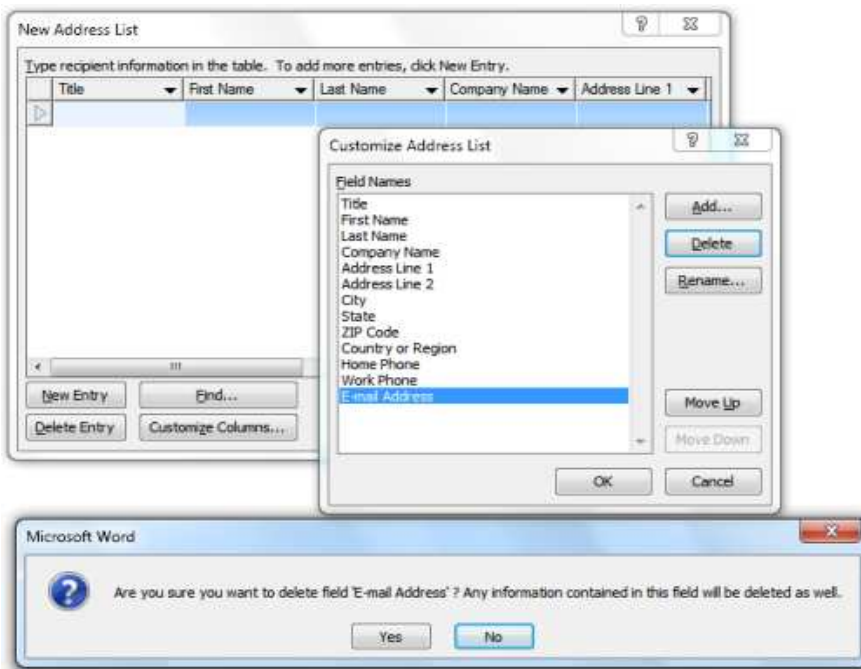
In the **New Address List** dialog box you can specify and create a file that contains the recipients' names and addresses (**Data Source**).



➔ Type in address information, one address per line.

If you scroll across using the scroll bar at the bottom of the dialog box you'll see that there are many columns, (**Field Names**). Use the tab key to move from column to column.

➔ Click on the **Customize Columns** button to delete or add columns.



You can remove fields you don't need, for example:

E-mail Address

Work Phone

Home Phone

Country or Region

Zip Code

State

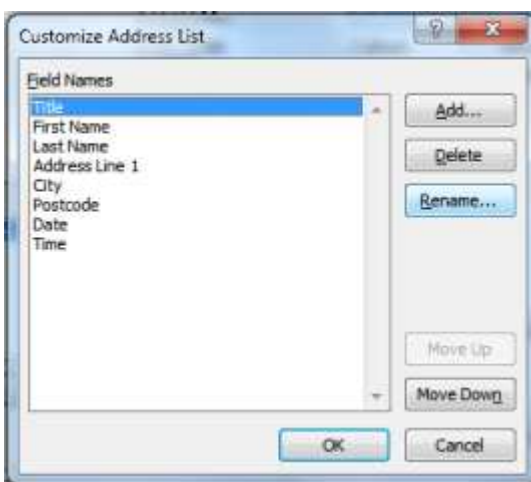
Address Line 2

Company Name

➔ Click on **Yes** to confirm the deletion

To complete the **Address List** the field **Postcode** should be added.

In our example, applicants are being invited to attend a job interview, therefore fields **Date** and **Time** need to be added also to the **Address List**.



➔ Click on **Add** and enter the fields names

Postcode,

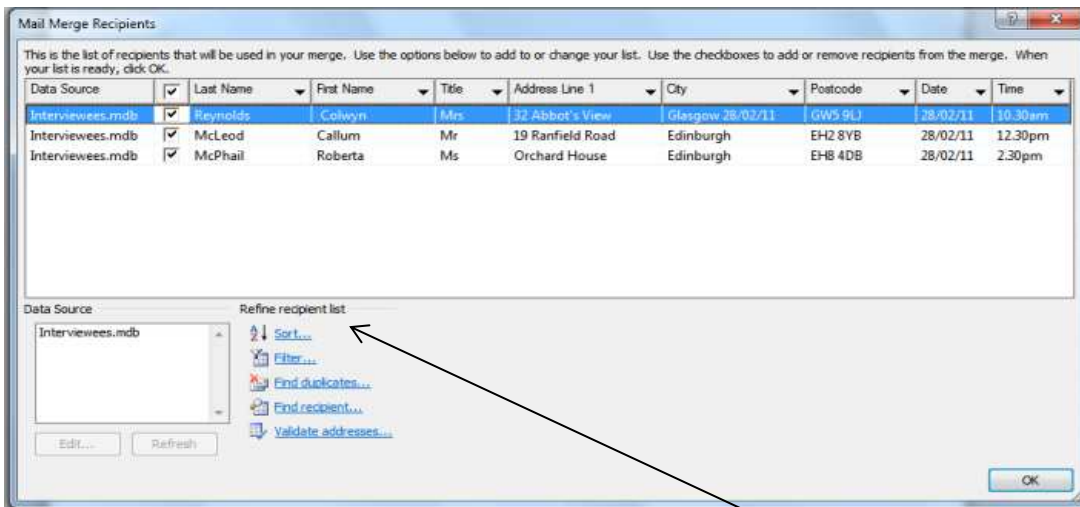
Date

and

Time

Click **OK**.

Enter the recipient's names and addresses as in the example below.



Refine recipient list

You can refine the recipient list by selecting any of the options below, **sort**, **filter**, **find duplicates**, etc.

➡ Click **OK**.

A **Save As** dialog box opens, take note of where the file is being saved, and the file type. The type of file is a **MDB** database.

➡ Type a name for your file in the **File Name** box.

Call it **Interviewees**. Click the **Save** button to save your address list. You will then be returned to Microsoft Word.

If you want to add new addresses to your list,

➡ click on **Edit Recipient List** on the **Start Mail Merge** panel.

Step 4: Write Your Letter

In the **Mail Merge** task pane, you have four options:



Address block

Use this option to insert a formatted address

Greeting Line

Use this option to insert a formatted salutation

Electronic postage

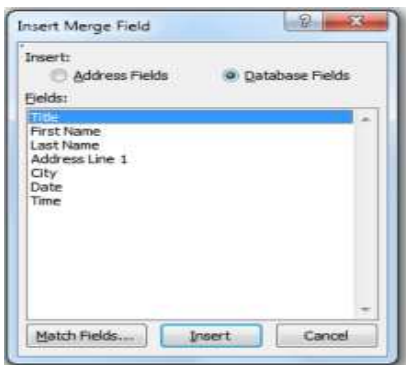
Use this option to insert electronic postage

More items

Use this option to insert individual merge fields

When you click **More Items**, the **Insert Merge Field** dialog box appears. Add the field codes where you want the variable information to appear.

Insert the merge fields where the address will appear, continue by typing Dear, followed by a space. Then insert the **Title Field** followed by **Lastname Field** and press **Enter** a couple of times to create some space between the opening salutation and the rest of the letter, which you can now type.



Complete the letter with an appropriate ending such as **Yours faithfully** or **Yours sincerely** and add your name. Save the letter with a name you won't forget, such as **Master1.docx** as this is the master letter for the mail merge.

Mail Merge Letter

«Title» «First_Name» «Last_Name»
«Address_Line_1»
«City»
«Postcode»

Dear «Title» «Last_Name»

An interview for the post of Maintenance Supervisor has been arranged for you on «Date» at
«Time». If this is not convenient, please contact us as soon as possible.

Yours faithfully

Ann Smith

Step 5 Next: Preview your letters.

Preview what the merged letters will look

- ➔ Click the **Preview Results** button in the top right of the **Mailings** tab.

The **Preview Results** button turns orange when selected. Word will then substitute the details for the first record in your letter.



You can then preview each letter in turn

- ➔ Click the right pointing **Next Record** button.



Step 6: Complete the Merge

Select Next: **Complete the Merge** and choose **Edit Individual Letters**. In the **Merge to New Document** dialog box

- ➡ Click **All** and click **OK** to create a separate letter for each recipient.



Example of merged document

<p>Mr Callum McLeod 19 Ranfield Road Edinburgh EH2 8YB</p> <p>Dear Mr McLeod</p> <p>An interview for the post of Maintenance Supervisor has been arranged for you on 28/02/11 at 12.30pm. If this is not convenient, please contact us as soon as possible.</p> <p>Yours faithfully</p> <p>Ann Smith</p>
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It is now possible to edit individual letters without affecting the remaining correspondence.

Saving the letters

The merged letters are all contained in one file. Save this file

Click on the **File** tab on the **Word** Ribbon. You can copy and paste any of these letters into an individual file.