

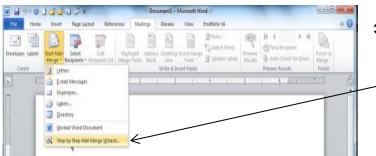


Using Mail Merge in Word 2010

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**.

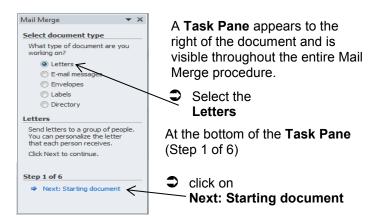
The **Mail Merge** file will hold special symbols (**Mail Merge Fields**), which will substitute the name and address and other relevant information stored in the data file.



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

Performing the merge

Step 1: Selecting document type



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.

If you require this document in an alternative format, such as larger print, please email IS.skills@ed.ac.uk

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

Create...

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

| ype recipient in | formation | in the table. To | add more entries, | , click ! | New Entry. | | |
|------------------|-----------|------------------|-------------------|-----------|--------------|------------------------------------|----|
| Title | - | First Name | - Last Name | - | Company Name | Address Line 1 | ۰. |
| \triangleright | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
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| | | | | | | | |
| | | | | | | | |
| · | m | | | | | | |
| New Entry | m | End | 1 | | | | |

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.

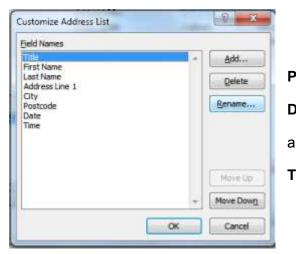
Click on the **Customize Columns** button to delete or add columns.

| Vew | Address L | ist | | | | | | 9 | 23 |) | | You can remove fields you don't |
|------|----------------|-----------|------------------------|--------------|------------------------------|------------------|-----------|-----------------|------------|-------------------|------|------------------------------------|
| Туре | e recipient is | nformatio | in the table. | To ad | d more entries, c | ikk New Entry | is - | w.:- | | | | |
| | Title | - | First Name | • | Last Name | + Company | Name 👻 | Address Line | 1 \star | | | need, for |
| Þ | | | | | | | | T. | 1100 | | | example: |
| | | | | | Customize A | ddress List | | | 8 | 22 | | |
| | | | | | Ejeld Names | | | | | | | E-mail Address |
| | | | | | Title First Name | | | * | Add | d | | Work Phone |
| | | | | | Last Name Company Na | | | | Del | ete | | |
| | | | | | Address Line Address Line | | | | Rena | me | | Home Phone |
| | | | | | City State | | | | | | | Country or |
| | | | | | ZIP Code Country or F | | | | | | | Region |
| | | | | - | Home Phone Work Phone | - | | | | | | Region |
| | ew Entry | | Eind omize Columns. | - | E-mail Addre | | | | Mov | eUp | | Zip Code |
| 129 | sere chay | Cust | omze courins. | <u>terii</u> | | | | | Move | Down | | State |
| | | | | | | | 1 | OK | Car | ncel | | State |
| _ | | | | _ | | | | | <u></u> | | | Address Line 2 |
| Mic | rosoft Wo | rd | | | | | | | | | × | Compony Nome |
| | 0 | | | | | | | | | | | Company Name |
| | O ^ | re you su | ire you want to | deleta | e field 'E-mail Add | Iress' ? Any ini | formation | contained in th | is field w | III be deleted as | wel. | |
| | | | | | Yes | No | | | | | | |
| - | _ | _ | | _ | | | _ | _ | _ | | | |

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 |
| ind |
| īme |
| |

Click OK.

| Interviewces.mdb Responds Colwym Mrs. 32 Abbot's View Glasgow 28/02/11 GWS 9(.) 28/02/11 10.30am Interviewces.mdb McLeod Callum Mr 19 Ranfield Road Edinburgh EH2 8YB 28/02/11 12.30pm Interviewces.mdb McPhail Roberta Ms Orchard House Edinburgh EH8 4D8 28/02/11 2.30pm Data Source Refine recipient list Interviewces.mdb Association As | Data Source | ~ | Last Name | First Name | ➡ Title | ✓ Address Line 1 | ✓ City | + Postcode | 🗸 Date 🗸 | Time 👻 |
|--|------------------|---------|-------------------|------------------------|---------|------------------|-----------------|------------|----------|---------|
| Interviewees.mdb V McPhail Roberta Ms Orchard House Edinburgh EH8 4DB 28/02/11 2:30pm | Interviewees.mdb | ~ | Reynolds | Colwyn | Mes | 32 Abbot's View | Glasgow 28/02/1 | 11 GW5 9L) | 28/02/11 | 10.30am |
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| Interviewees.mdb 21 Soft Fibr Edf Refresh Valdate addresses | Interviewees.mdb | ~ | McPhail | Roberta | Ms | Orchard House | Edinburgh | EH8 4DB | 28/02/11 | 2.30pm |
| Edit Refresh | | | * 24 Sort | N | | | | | | |
| | | | - Contended Final | duolcates recipient | | | | | | |
| | | 100 A | | | | | | | | |
| | Edit | Refre | sh | | | | | | | ок |
| Refine rec | Edr | Refre | sh | | | | | | | |

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

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.

C 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:

| Mail Merge | - × | | |
|--|---|----------------------|--|
| Write your letter | | Address block | Use this option to insert a |
| If you have not alread write your letter now. | y done so, | | formatted address |
| To add recipient inform your letter, click a local document, and then cli- the items below. | tion in the | Greeting Line | Use this option to insert a formatted salutation |
| Address block | 11 () () () () () () () () () (| — , , , , , , | |
| Greeting Inc | and the second se | Electronic postage | Use this option to insert |
| Eectronic post | age | | electronic postage |
| More items | | More items | Use this option to insert |
| When you have finishe your letter, dick Next, can preview and perso recipient's letter. | Then you | More items | 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.

| ert: | Qatabase Fields |
|--|-----------------|
| jelds: nce first Name aast Name Address Line 1 City Date Time | |
| | |

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.

| Merge records | | | |
|---------------|-------|-----|--|
| Current re | ecord | | |
| C Brote: | | Tot | |

Example of merged document

| Mr Callum McLeod |
|--|
| 19 Ranfield Road |
| Edinburgh |
| EH2 8YB |
| Dear Mr McLeod |
| 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. |
| Yours faithfully |
| |
| |
| Ann Smith |

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.