



Mailings Tab (Important buttons marked)



Mail Merge Task Pane (Top)

How does Mail Merge work?

Hi everybody and welcome to this week's blog which is all about using MS Word to perform Mail Merges. This can be a thorny problem, and I get loads of questions about it, so I hope what follows will sort a few things out for you.

Once set up, Mail Merge can save you a huge amount of time, plus, you can really impress colleagues, clients and even yourself with the results! Have a read and download the example files too, you will need to reconnect them

See you next time.
"Les is more!"

1.1 What is Mail Merge

You often use mail merge to send out standard letters or emails to many customers or contacts. These will have the same static text but understandably the address and the "Dear ..." salutation will be different for each recipient.

You can use mail merge for other types of merge documents, though – address labels; envelopes, and directory lists ...

Mail Merge is actually 2 documents working in tandem:

MAIN Document	Contains static text & merge field "hotspots" for variable data (eg Standard letters, Labels ...)
RECIPIENT List (DATA Source)	A separate Word, Excel or Access file supplying the variable data

- It is easier to set up Recipient List in advance as a **TABLE** in Excel, Word or Access – I prefer an Excel list. You then connect this to the Main document via the Mail Merge Wizard (see below)
- Also, it is useful to show **Mailings Tab** and **Mail Merge Wizard** (These 2 items are illustrated at the top of this page)

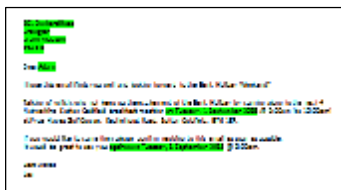
Creating the DATA Source List

FirstName	LastName	Job	Company	Tel	Mob	Email	Address1	Ad
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1. Decide on the field (column) headings you need and type them on Row1 in new Excel spreadsheet & format to suit
2. Complete each subsequent row with one recipient's details
3. Save the file with a suitable appropriate name and in a folder you can find again easily then close Excel (Step 3 below)

Working out how the Main Document will look

1. Until you're confident with mail merge, I suggest you type up the Main document in full, print it and use a highlighter to identify the variable parts of the doc
2. Later, replace the marked areas one at a time with the appropriate Mail Merge Field (Step 4 below)



1.2 Steps when using the Mail Merge Wizard

- Click the Mailings Tab, Start Mail Merge, then Step by Step Mail Merge Wizard
- Can navigate forwards / back through the following 6 Steps:
 1. Selecting the type of main document
 - The default is **Letters** ...
 - Click **Next ...** to continue (bottom of Wizard Pane)
 2. Starting the main document
 - The default is **Use the current document** ...
 - Click **Next ...** to continue (bottom of Wizard Pane)
 3. Selecting the Recipient List (Data Source)
 - The default is **Use an Existing List** ...
 - Click **Browse** to find and connect to it
 - Click **Next ...** to continue (bottom of Wizard Pane)
 4. Writing the main document
 - Using the earlier advice, position the cursor at each variable point then delete unwanted information
 - Click the **Insert Merge Field** button on the Mailings Tab and click the field needed in the field name list
 - Complete the main document like this - use natural spacing, "Enters" and punctuation as needed
 - Click **Next ...** to continue (bottom of Wizard Pane)
 5. Previewing the main document with merged data
 - Here the emphasis is on **Previewing** not **Printing** –
 - This step is designed to show how the document will look with each recipient's data in turn
 - Use the navigators on the **Mailings Tab** or on the **Mail Merge Wizard** to move between each letter
 - Click **Next ...** to continue (bottom of Wizard Pane)
 6. Printing or merging to a new document
 - Only do the latter if really necessary– definitely **DO NOT** save the merged doc, just the main doc and data source

1.3 Other Useful Options prior to Printing/Sending

Mostly found on the Mailings tab:

Opening/Editing/Relinking the Data Source

3. Click Mailings tab, **Select Recipients** to link to a new or different Data source Data Source file



Showing Data Merged in the Main Document

1. Click Mailings tab, **Preview Results**
2. The 4 navigation buttons help view records



Viewing/Editing Recipients

1. Click Mailings tab, **Edit Recipient List**
2. Tick/untick the recipients for the Mail Merge
3. Click a column heading to sort by that column
4. Click a column drop-down for filter options – (**Advanced**) opens the Query Options dialog (See next Section)



1.4 Filter/Sort Records Options

Can Filter/Sort the recipients to control the merge ...

Sorting Records

1. Click Mailings tab, **Edit Recipient List**, Sort link ...
7. Set record sorting options then click OK



Filtering Records

1. Click Mailings tab, **Edit Recipient List**, Filter link ...
8. Set record filtering options then click OK



1.5 Managing Merges

1. Click Mailings tab, **Finish and Merge** then:
 - Edit Individual Documents (Do not save it though – just for checking) ...
 - Print documents (Straight to printer) ...
 - Send e-mail messages ...

