

Microsoft Word Mail Merge

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1. Course objectives.
 - a. To explore the mail merging with Microsoft Word.
 - b. To develop computer and basic database literacy.
 - c. To address the class' questions.
2. Schedule - 9:30 - 12:00
3. Handouts available in Adobe Portable Document Format (PDF) for download at www.crowleycomputers.com/handouts.htm



1. Basic concepts

- a. All mail merges require two sources of information.
 - i. Document
 - (1) Could be letter, email, fax, envelope or label, or a directory (listing).
 - (2) Contains the content of your message
 - ii. Recipients list or database
 - (1) Can be existing or new source of information
 - (a) If it exists, don't retype it!
 - (2) Many possible sources:
 - (a) Outlook Contacts or Address Books
 - (b) Access, dBase, Excel and ODBC registered databases
 - (c) Word, RTF documents
 - (d) Web pages
 - (e) And more!
 - (f) Any database that can be exported into a recognized data format! IE QuickBooks can export lists into Excel!

b. Database concepts

- i. Database - a collection of data (that is, items of unstructured information) organized to make it easy to search and easy to retrieve in a useful, usable form.
- ii. Table - a single store of related information. You can think of the phone book as a table: It contains a record for each telephone subscriber, and each subscriber's details are contained in three fields – name, address and telephone.
 - (1) Record - a table consists of records
 - (2) Field - each record is made up of a number of fields.

2. Wizard

- a. Having started the document or recipients list will not keep the wizard from working. Having your document started simplifies the wizard.
- b. Wizard appearance changes greatly between Word versions, but concepts are the same.
- c. Think "database" when you see "recipients".

October 21, 2003



Dear Magical Patron,

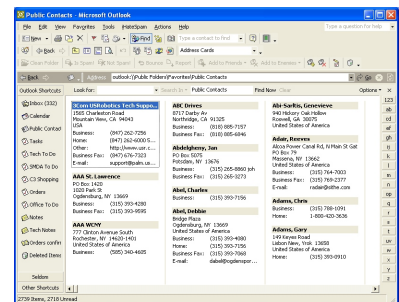
The Mystical Library has always had a warm place in its heart for donors which have helped us in past years. As a "Magical Patron" your past donations have helped us increase our spell collection, expand our young magicians program and build the Merlin Wing – of which we are all so proud.








It is time once again for our appeal. This year brings the Mystical Library extra difficulties meeting our financial goals. Outbacks in potions, more rare illnesses due to wasteful expenses of this precious resource, and the operational cost of many precious pieces have put us all behind the proverbial eight ball.

Your contributions are our life blood – no offense to the appropriate evil spirits – and without your support the Mystical Library may vanish. Please give until it hurts using the enclosed form and envelope.

Thank you for your assistance.

Hermione Granger
Head Librarian



<p>Select document type</p> <p>What type of document are you working on?</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Letters <input type="radio"/> E-mail messages <input type="radio"/> Envelopes <input type="radio"/> Labels <input type="radio"/> Directory <p>Letters</p> <p>Send letters to a group of people. You can personalize the letter that each person receives.</p> <div style="border: 1px solid black; padding: 5px; text-align: center; margin: 20px auto; width: 100px;"> Mystic Library Letter.doc </div> <p>Click Next to continue.</p> <p>Step 1 of 6</p> <p>⇒ Next: Starting document</p>	<p>3. Not sure what an option is? Select it, the description below the choices will change to describe your selection.</p>	<p>4. Select your document</p> <p>a. Start from template allows you to start a new document, choose Blank Document from General tab for a "clean slate."</p> <p>b. Start from existing document allows you to open a document.</p> <p>Select starting document</p> <p>How do you want to set up your letters?</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Use the current document <input type="radio"/> Start from a template <input type="radio"/> Start from existing document <p>Use the current document</p> <p>Start from the document shown here and use the Mail Merge wizard to add recipient information.</p> <p>Step 2 of 6</p> <p>⇒ Next: Select recipients</p> <p>⇐ Previous: Select document type</p>
<p>Select recipients</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Use an existing list <input type="radio"/> Select from Outlook contacts <input type="radio"/> Type a new list <p>Use an existing list</p> <p>Use names and addresses from a file or a database.</p> <ul style="list-style-type: none">  Browse...  Edit recipient list... <p>Step 3 of 6</p> <p>⇒ Next: Write your letter</p> <p>⇐ Previous: 5 Next wizard step</p>	<p>5. Select the database which contains your data or create it now!</p> <p>a. Finding your existing list is the hardest, you need to know where it is stored!</p> <div style="border: 1px solid black; padding: 5px; text-align: center; margin: 20px auto; width: 100px;"> OFA 83 Reunion.mdb </div>	<p>6. Your letter can use <u>all</u> Word tools and formatting.</p> <p>a. Fields are inserted - they will be replaced with the information from your database.</p> <p>b. Fields will highlight when you click on or cursor to them.</p> <p>Write your letter</p> <p>If you have not already done so, write your letter now.</p> <p>To add recipient information to your letter, click a location in the document, and then click one of the items below.</p> <ul style="list-style-type: none">  Address block...  Greeting line...  Electronic postage...  Postal bar code...  More items... <p>When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.</p> <p>Step 4 of 6</p> <p>⇒ Next: Preview your letters</p> <p>⇐ Previous: Select recipients</p>

Preview your letters

One of the merged letters is previewed here. To preview another letter, click one of the following:

<< Recipient: 1 >>

Find a recipient...

Make changes

You can also change your recipient list:

Edit recipient list...

Exclude this recipient

When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments.

Step 5 of 6

Next: Complete the merge

Previous: Write your letter

7. Previewing is a critical step!

- a. Verify
 - i. Document
 - ii. Data
- b. Be sure to look at enough records to see what is and isn't working!

8. You'll likely find you will need to:

- a. Edit field mapping
- b. Adjust the database

9. Editing individual documents requires saving the entire merged document. Do you need this?

Complete the merge

Mail Merge is ready to produce your letters.

To personalize your letters, click "Edit Individual Letters." This will open a new document with your merged letters. To make changes to all the letters, switch back to the original document.

Merge

Print...

Edit individual letters...

Step 6 of 6

Previous: Preview your letters

Select recipients:

To sort the list, click the appropriate column heading. To narrow down the recipients displayed by a specific criteria, such as by city, click the arrow next to the column heading. Use the check boxes or buttons to add or remove recipients from the mail merge.

List of recipients:

<input type="checkbox"/>	Last name	First name	Address	State	Zip	Maiden
<input checked="" type="checkbox"/>	Amo	Chris	1 York St	NY	13654	
<input checked="" type="checkbox"/>	Anson	Brian	Penningto...	FL		
<input checked="" type="checkbox"/>	Armstrong	Kelly	42 Tait Rd	NY	13658	Barr
<input checked="" type="checkbox"/>	Badlam	Tony	506 New Y...	NY	13669	
<input checked="" type="checkbox"/>	Bailey	Jeff	5 Mile Line ...	NY		
<input checked="" type="checkbox"/>	Baker	Jeff	5430 41St ...	WA	98136	
<input checked="" type="checkbox"/>	Barber	Lisa	716 Bigelo...	NY	13669	Haines
<input checked="" type="checkbox"/>	Barnes	Kelly	10 Grant St	VT	05452	Knowles
<input checked="" type="checkbox"/>	Barr	Troy	623 Patters...	NY	13669	
<input checked="" type="checkbox"/>	Barr	Timothy	215 Tate St...	NY	13669	
<input checked="" type="checkbox"/>	Barr	Donna	5054 Creek...	OH	44212	Gooshaw
<input checked="" type="checkbox"/>	Barr	Dave	25 Bearhu...	NY	13413	

Select All Clear All Refresh

Find... Edit... Validate OK

Inserting fields:

Specify address elements

Insert recipient's name in this format:

Joshua
Joshua Randall Jr.
Joshua Q. Randall Jr.
Mr. Josh Randall Jr.
Mr. Josh Q. Randall Jr.
Mr. Joshua Randall Jr.

Insert company name

Insert postal address:

Never include the country/region in the address

Always include the country/region in the address

Only include the country/region if different than:

Preview

Mr. Joshua Randall Jr.
Blue Sky Airlines
1 Airport Way
Kitty Hawk, NC 27700
United States of America

Match Fields... OK Cancel

Mail Merge has special features for easily working with addresses. Please specify address field components to simplify address insertion.

Required information

Last Name: Last name

First Name: First name

Courtesy Title: (not available)

Company: (not available)

Address 1: Address

City: (not available)

State: State

Postal Code: Zip

Spouse First Name: Spouse first name

Optional information

Middle Name: (not available)

Suffix: (not available)

Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)

OK Cancel

Chris Amo
1 York St
, NY 13654

October 21, 2003

Dear Chris,

The Mystical Library ha:

Creating address list

New Address List

Enter Address information:

Title: Mr.
 First Name: James
 Last Name: Crowley
 Company Name: C3 - Crowley Computer Consulting
 Address Line 1: 9148 State Hwy 37
 Address Line 2:
 City: Ogdensburg
 State: NY

Buttons: New Entry, Delete Entry, Find Entry..., Filter and Sort..., Customize...

View Entries:

View Entry Number: First, Previous, 1, Next, Last

Total entries in list: 1

Close

Filter and Sort

Filter Records | Sort Records

Field: ZIP Code | Comparison: Equal to | Compare to: 13428

Buttons: Clear All, OK, Cancel

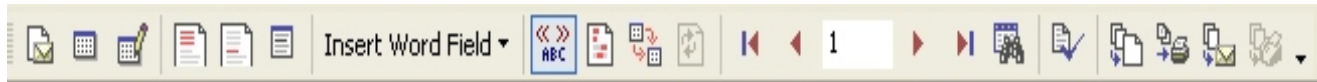
Customize Address List

Field Names:

- Title
- First Name
- Last Name
- Company Name
- Address Line 1
- Address Line 2
- City
- State
- ZIP Code
- Country
- Home Phone
- Work Phone
- E-mail Address
- 2002 Donation

Buttons: Add..., Delete, Rename, Move Up, Move Down, OK, Cancel

Merge toolbar



- Merge to fax
- Merge to email
- Merge to printer
- Merge to new doc
- Check for errors
- Find
- Last record
- Next record
- Current record
- Previous record
- First record
- Propagate labels
- Match fields
- Highlight merge fields
- View fields/data
- Insert Word field
- Insert merge field
- Insert greeting line
- Insert address block
- Mail merge recipients
- Open data source
- Main document setup

Labels

Label Options

Printer information:

Dot matrix
 Laser and ink jet | Tray: Manual Paper Feed

Label information:

Label products: Avery standard

Product number:

- 2186 Mini - Diskette
- 2660 Mini - Address
- 2662 Mini - Address
- 2663 Mini - Shipping
- 3110 - Sticker
- 3111 - Sticker
- 3112 - Sticker

Label information:

Type: Address
 Height: 1.33"
 Width: 4.13"
 Page size: Mini (4 1/4 x 5 in)

Buttons: Details..., New Label..., Delete, OK, Cancel

