

# MICROSOFT® WORD

## MAIL MERGE

### LECTURE

## Instructions

Print this lecture and refer to it as you go through the Let's Do It exercise. After reading this lecture, print the documentation for reference, and complete the Let's Do It exercise. When completed, e-mail your finished merge document to [Sandi@fortheloveofsoftware.com](mailto:Sandi@fortheloveofsoftware.com) and receive feedback on your work. At any time during the course, you may e-mail your questions and comments for additional feedback.

## Lecture

### What is a Mail Merge?

The purpose of a **Mail Merge** document is to simplify a task that over the years has been quite a chore. In the days before computers and copy machines, if you wanted to send out the same letter to 500 people and have each one customized to address the person to whom you were sending it, you had to type the letter 500 times.

When copy machines became advanced enough to give quality copies, you could copy a typed letter 500 times, but you still had to somehow line up the address with the text in the typewriter carriage and type the name and address for each recipient on the individual copies.

When computers came along, and DOS was the main program used, a letter was typed once and then the name and address was changed in each document, printing them one at a time after each change. It was very easy to make a mistake when working this way.

Microsoft® Word takes all those laborious efforts and simplifies them into six simple steps. You are provided with a **Task Pane** that takes you through the steps one at a time and gives you hints on how to complete each step.

The idea is to type your **Form Merge Document** (document, letter, envelopes, e-mail, labels etc.) once, with the information that will not be changing and then create a second document, the **Data Merge Document**, with the information in it that will change from letter to letter, envelope to envelope, e-mail to e-mail, etc.

As with all Microsoft® products, more than one way to do some of the steps is built into the application. This lesson will teach one way to do each merge step and when you find a method that fits your work style better, use it. There is no wrong way to accomplish your task, there are just different ways.

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## How do I create a Database?

You should know that there are four different applications you can use to create your **database**.

1. Access **database** (the default used by Word when the **database** is created within the **Mail Merge** steps)
2. Excel spreadsheet (This is the method used for this lesson)
3. Word table
4. Outlook Contacts

### 1. Access **database**

When going through the six **Mail Merge** steps, step number three is the step that allows you to select your **database**. When you get to this step one choice is to "Type a new list." If you make that choice, the **data** will automatically be saved in an Access **database** and you don't have to do anything special to get it there. You don't even have to know how to use Access, the software does all the work for you, you only have to type in your **data**. This **database** can be edited either in Access or in the Word **Mail Merge** document.

### 2. Excel spreadsheet

The Excel spreadsheet is set up with the name for each **field** on the first row and the **data** for each letter in the following rows, one row per letter. This **database** can only be edited in the Excel document and the **Form Merge Document** must be closed to edit the data.

### 3. Word table

A Word table is set up just like an Excel spreadsheet. The first row of the table contains the name for each **field** and the **data** for each letter in the following rows, one row per letter. This **database** can be edited in both the Word **database** document (**Data Merge Document**) and in the **Form Merge Document**. However, if you are editing in the Word table, the **Form Merge Document** must be closed.

### 4. Outlook Contacts

This **database** is taken right from your Outlook contacts. The **data** can only be edited in Outlook, however, you do not need to close the **Form Merge Document** to make the edits to a contact and there is an update button to accept changes in the **data** that have been made in the Outlook contacts.

Each option serves its own purpose and you must decide for yourself which you will use. This lesson will only take you through the method using an Excel spreadsheet for the **database**.

To learn how to create a **database** using a Word table, [click here](#).

To learn how to create a **database** using an Access **database**, [click here](#).

To learn how to create a **database** using Outlook contacts, [click here](#).

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#### Final Notes

- You are creating two documents the **Form Merge Document** and the **Data Merge Document**. The **Form Merge Document** has information that does not change and will contain the **Field Codes** found in the **Data Merge Document**. The **Data Merge Document** has information that does change and contains the **Field Codes** that will be inserted into the **Form Merge Document**.
- The top row of an Excel spreadsheet or Word table is the name of the **Field Code** that will be inserted into the **Mail Merge**.
- On Step four, there are several pre-defined blocks for inserting **Field Codes**. If you have special **Field Codes** that do not fit any of the criteria available in those pre-defined blocks, select “More items” and you will be able to control the **Field Codes** one at a time and how they are inserted into your **Form Merge Document**.
- On step five, you have not completed your **Mail Merge** yet and the letters can be reviewed by clicking on the review arrows at the top of the **Mail Merge Task Pane**.
- On Step six, there are two options, “edit individual letters” and “Print.” You should be aware that if you select “edit individual letters,” those letters are created outside of the **Mail Merge** and can be printed just as you would any document. However, if you want to print all of the merged documents from this last step, you must print from within the **Mail Merge Task Pane** or you will only print the document showing on the computer screen.

#### Don't Worry

As you go through the documentation and complete the Let's Do It exercise, you will understand what each step and each term means and you will end up with your first successful mail merge.

#### Assignment

Print the documentation that accompanies this lesson and then complete the Let's Do It exercise. E-mail documents as directed in the exercise.

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#### Glossary of terms

**Data**-a collection of factual information

**Data Merge Document**-a document containing the **field codes** and **data** to be used in the **Mail Merge**

**Database**-the information to be used to personalize each letter, document, e-mail, etc.

**Field**-each individual part of the **database**, such as the Sandi (First Name) or Grandberry (Last Name) or 1928 E. Highland (Street Address), etc.

**Field Codes**-title for each individual part of the **Database**, such as FirstName, LastName, StreetAddress

**Form Merge Document**-document used in the **Mail Merge** containing information that does not change

**Mail Merge Task Pane**-a window displayed on the right side of your screen, containing the six **Mail Merge** steps; displayed by clicking on View, Task Pane and then selecting **Mail Merge** from the bottom of the list or using the keystroke Ctrl F1

**Task Pane**-a window displayed on the right side of your screen, containing several different **Task Panes**, a drop down menu at the top of the **Task Pane** displays a list of panes from which to choose