

MICROSOFT WORD 2010

How to Do a Mail Merge

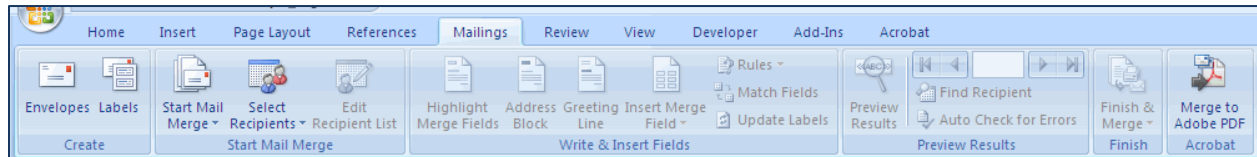
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Introduction

If you have used any of the Office 2007 applications then you are already aware that the *Ribbon* interface replaced the familiar menus and toolbars with *Tabs*, *Groups*, and *Commands*. Although Word 2010 retains the same interface it offers: (1) a new *Backstage* view to manage your documents, (2) the ability to customize the *Ribbon* with custom *Tabs* and *Groups*, (3) an *Info* menu that displays different commands, properties, and metadata depending on the status and location of the document, (4) a new *Screenshot* tool and other numerous features.

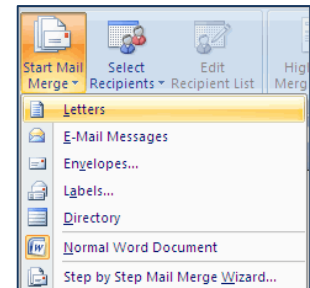
However, creating a mail merge in the latest version has remained the same as in Word 2007. The tab “Mailings”, still hosts the tools and commands used to create merged documents for e-mail messages, labels, address envelopes or even a directory. This includes retaining the popular *Mail Merge Wizard* to provide users with step by step help to complete their task.

Note: The term directory refers to address lists that can be saved along with your mailings.



Creating a Merged Document

1. Click on the tab “Mailings” and then the icon “Start Mail Merge”.
2. Choose either the icon “Letters” or the “Step by Step Mail Merge Wizard”. For this example select the Step by Step Mail Merge Wizard.



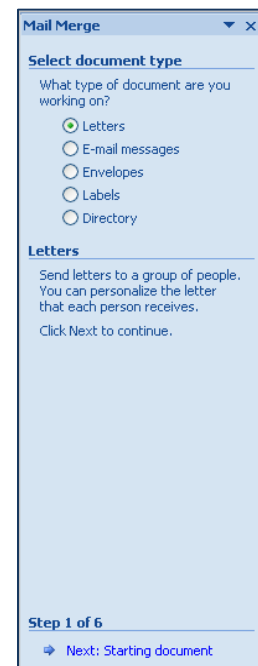
New users often prefer the *Step by Step Mail Merge Wizard* because it uses six steps to generate a merge document. In addition, the user may return to a previous step at any time.

3. This will open the Wizard in a Task Pane located in the right hand side of the current documents window.

Special Mention: Notice that when you make a selection in the Wizard pane the next level reflects your choices and may require making additional choices.

Step 1

Select document type – The five different document types are Letters, E-mail messages, Envelopes, Labels, or a Directory. Choose “Letters” for the document type and then click on “Next”.



Step 2

Select starting document – In the second step the user decides on whether to use the current document, an existing template, or another document (form letter) for the working file.

You will choose to Starting from an existing document.

- Current document – allows the user to enter text immediately in the present document.
Special Note: Word allows the recycling and editing of past form letters. Simply open the desired document before starting the Word Mail Merge Wizard and attach the data source if prompted.
 - Starting from a template – There are *ten* mail merge templates to choose from, each can be edited to meet your needs.
 - Starting from an existing document – The user locates and opens the desired document (form letter) from a designated location.
4. Click on “*Open*” to locate the document. Word provides a warning message that the contents of the existing document will be lost during the change.
 5. Click “*Next*” to continue to Step 3.

Creating a New Data Source Step 3

Select recipients – In third step the user is required to select a *Data Source* from an *existing list* or to *create a new one*. Data sources are any Word, Excel, or Access file that contains information to use in the Mail Merge.

1. Select the option to “*Type a New List*” and then click the link “*Create*” located in the lower menu. This opens the “*New Address List dialog box*”.
 - To add information type in the fields provided.
 - To rename, delete, or reposition a field click on the button *Customize*.
 - To add another entry click on the *New Entry* button.

Title	First Name	Last Name	Company Name	Address Line 1
Ms	Sharon	Smith	University of Scr...	123 Nowhere Lane

Mail Merge

Select recipients

Use an existing list

Select from Outlook contacts

Type a new list

Use an existing list

Use names and addresses from a file or a database.

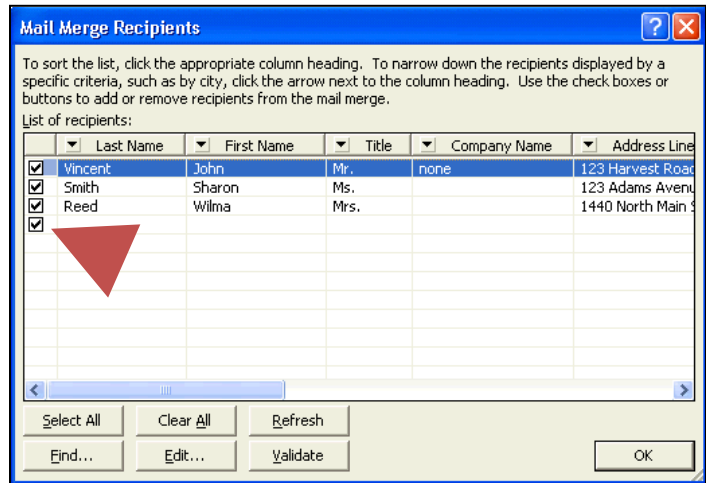
Step 3 of 6

Next: Write your letter

Previous: Starting document

2. After completing the address list click *OK* to name and save the list. *By default the file is saved as an .mdb database file in a folder titled My Data Sources.*

Note: When opening an existing data source remember to remove the last row's checkmark to remove the blank data from the file.



3. In the *Mail Merge Recipients dialog box* you can edit each recipient's information or search for specific fields.

How to:

Sort – click on the column heading.

Remove a recipient without deleting them – remove the checkmark in front of the name.

Select All – all recipients will be included in the data source.

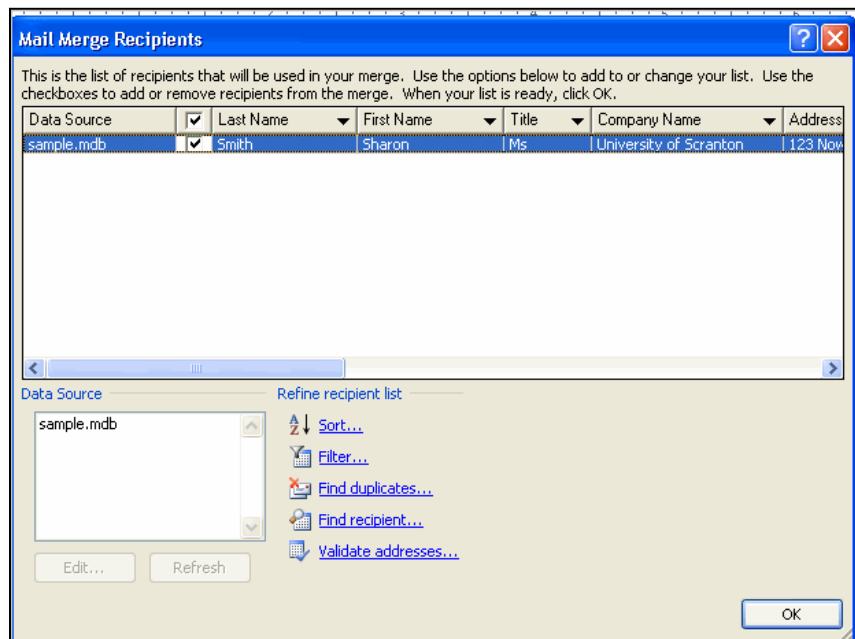
Clear All – deselect all recipients in the data source.

Find – a search function used to find a specific recipient.

Edit – click on an existing record and then the *Edit button*, edit the existing information when the *Address dialog box* opens.

Add New Record (Entry) – click on an existing record and then the *Edit button*, when the *Address dialog box opens* click on the *New Entry button*. Add the new information.

Validate – requires a third party source to check the validity of the data.



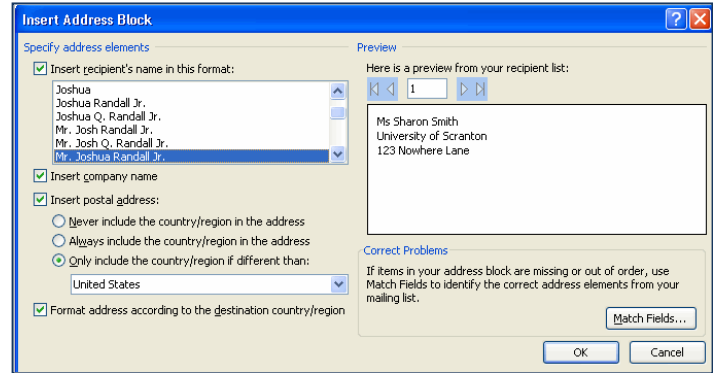
Step 4

Adding Merge Fields

Word provides assistance with several items such as *Address Blocks*, *Greeting Lines*, *Electronic Postage*, *Postal Bar Codes*, and fields specified in your data source.

To add a field click inside the document location where the first field is to be inserted and then choose from one items listed or click on “*More items*” to access the *Insert Merge Fields dialog box*.

If you are creating a new form letter for distribution click on the *Address Block link* to open the *Insert Address Block dialog box*.



Select the proper format and then check or uncheck any elements that you want included in the *Address Block*.

To hide any undesired elements remove the check mark from its location.

Close the dialog box by clicking on the OK button. Word now inserts the code *Address Block* where the insertion point was located.

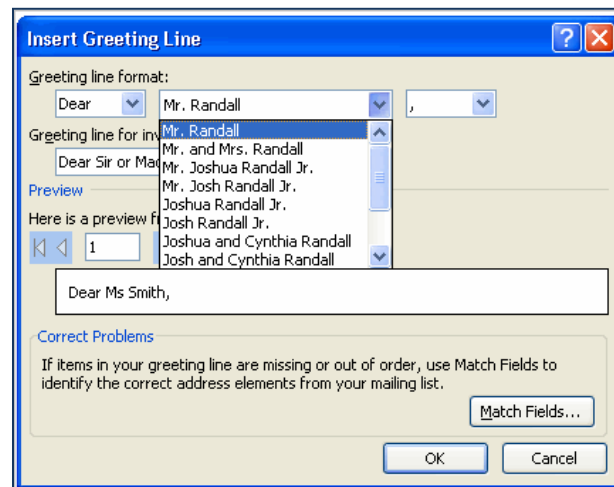
Add a Greeting Line

Place the insertion point where you want to add the greeting, then click on the link *Greeting Line*, shown in Step 4.

Choose the proper salutation for your document from the *Greeting Line dialog box* and then click on the OK button.

Word 2010 also provides the option of adding a generic greeting for those addresses that show an empty entry.

Click on OK to add the *Greeting Line* code. Next press *Enter twice* and start typing your letter.



Special Note: Merge fields can be entered anywhere deemed appropriate. This is demonstrated on the next page.

Inserting Merge Fields within the Document

Open the Insert Merge Field dialog box, then click on the button “Match Fields,” to verify that the naming conventions used in your data source match the merge fields in Word. Especially if you are using a data source that someone else created.

1. Method 1 - *click* on the *Insert Merge Field* button located on the *Mail Merge Toolbar*.
2. Method 2 - *click* on the *link More Items* displayed in *Step 4*.

Check the circle (radio button) for either *Address Fields* or *Database Fields*. Address Fields exist in your personal address book (Outlook) and Database fields are the traditional fields found in a database.

To insert a field first select the field and then click on the buttons *Insert* | *Close*. Unfortunately, Word does not allow you place a space between fields or press the Enter key when the Insert Merge Field dialog box is open.

However, you can insert multiple fields and then go back and add spacing or to move a field to a new line by pressing the Enter key. Just place the insertion point between the start and end arrows of the fieldbar that requires the space or move to a new line. Press the *Spacebar* or the *Enter key* to accomplish the required task.

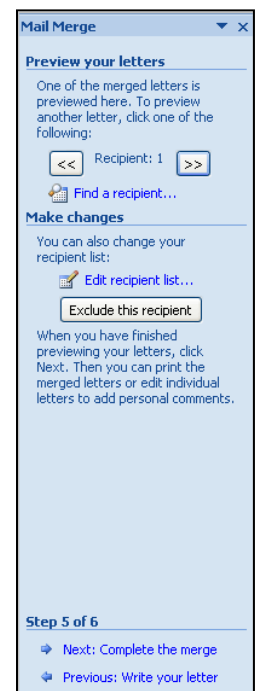
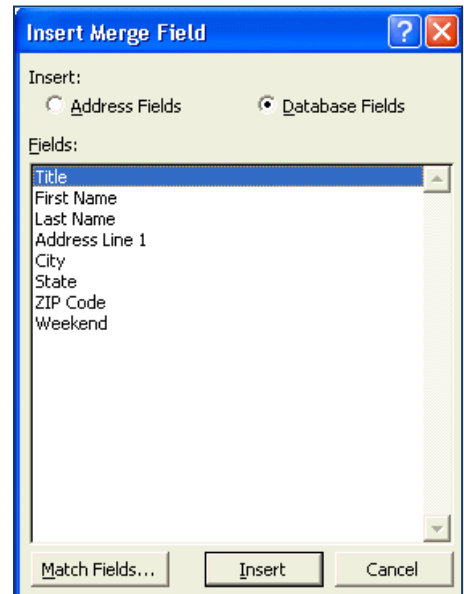
Step 5

Preview your letters – in Step 5 the Wizard allows you to *preview you letters*, *edit the recipient list*, or *exclude a recipient*. To finish click on the *link Complete the merge*.

Check for Errors

To check for and report mail merge errors with a Mail Merge document click on the Check for Errors button located on Mail Merge Toolbar. Clicking on the button activates the Checking for and Reporting dialog box, which provides the user with three personal preference options.

- Simulate the merge and report errors in a new document - this is a simulated test that only reports errors it finds and does not change the working document.
- Complete the merge and report each error as it occurs - completes the merge but stops the process at each error found.
- Complete the merge without pausing - reports the errors in *a new document*.



Merge Options

These options include *Merge to New Document*, *Merge to Printer*, *Merge to E-mail*, and *Merge to Fax*. The latter requires a faxing system supported on your system such as *Microsoft Fax* or *WinFax* (Symantec) to name a few. The buttons for these options are located on the Mail Merge Toolbar.

- *Merge to New Document* – Exactly as stated the mail merge is completed in a new document.
- *Merge to Print* – Print all records, Print displayed record, and From To. The first two options are self-explanatory. The third option From and To allows the user to define how many letters will be printed at one time. Selecting this option prevents overloading the spooling capacity of the printer. Make your selection based on the number of letters you are generating.
- *Merge to E-mail* – This option by default is configured to work with Microsoft Outlook, which the University of Scranton does not support. Activating this link would allow the user to send the mail merge as an Attachment, HTML, or Plain Text.

Printing Envelopes and Labels

To print a single envelope or label a Mail Merge is not required. Simply select the tab Mailings | and then either *Envelopes or Labels* from the group Create. If you select the option *Add to Document* this will add an envelope to the current document and both will print together.

Creating a Data Source in Excel

1. Open *Excel* and then enter the fields Salutation, First Name, Last Name, Address, City, State, and Zip Code as column headings. Populate the spreadsheet with five fictitious names and then save the example file as My Data Source.
2. Open *Word* and then start the Mail Merge Wizard using the earlier instructions.
3. Repeat *Steps 1 & 2* from the earlier instructions In *Step 3* opt to use an existing list and then click on the button *Browse*. When the *Select Data Source dialog box* opens click on the down arrow and change the Files of type to All Files. Select the Excel file you created earlier from the list or navigate to the folder where the files were saved.
4. Click on *Open* and another dialog box opens asking whether to use the Entire Spreadsheet or a Named Range within the spreadsheet. Choose to use the entire spreadsheet.

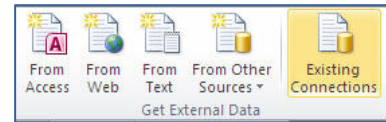
Note: A named range contains a selected group of cells with an assigned name.

5. Complete the Form Letter using the steps outlined earlier.

Importing a Data Source into Excel (Text delimited file)

To use a data source that was exported from Banner into a text file, you must import the file into Excel.

1. In an open worksheet, click the tab *Data* and then the command *Get External Data*. In this example the source is a text file located within your Royal Drive account.

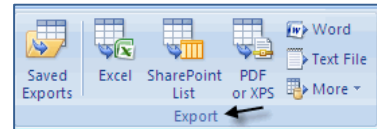


Note - You must be logged into your Royal Drive account using the desktop client.

2. Click the command “*Existing Connections*” and then the button “*Browse for More.*”
3. Navigate to the *R: Drive*, the directory *Users* and then *your named directory*. Locate the text file and select it.
4. Click “Open” to start the *Text Import Wizard*, and choose Delimited as the type of the file that best describes your data.
5. Select the proper delimiter and review your data. Click “*Next*” to choose format options and then “*Finish*”, to import the data.
6. Select the cell where the data should be imported and then click *OK*.

Creating a Mail Merge in Access

1. Start Access and then open the database that is storing the desired information. Select the Table or Query that you will use for your data source.
2. Click on the tab *External Data* and then in the Group *Export* click on the command “*Word Merge*”.
3. Select the option *Create a New Document* and Link the Data to It, from the dialog box. Choosing this option creates a *New Merged Document* using the fields from the selected *Table* or *Query*.
4. Click on the *OK* button and Microsoft Word will launch the *New Mail Merge Document*. Verify you data source from *the Insert Merge Field List*. Follow the same steps using in creating normal mail merge.



Creating a Directory

A directory is often used to keep a complete listing of all records in your source file. Example directories include address books, preferred customers, etc.

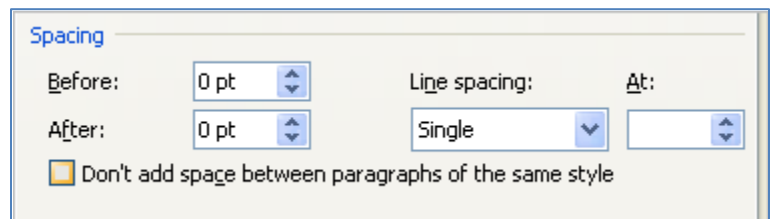
1. In this example create and save an Excel file named *Directory* for the data source. Type the fields *Name* and *Phone Number* for column headings. Type four or five fictitious names and phone numbers for data. Type the first and last name as one name.

2. Click on the tab “*Mailings*” and then the icon “Start Mail Merge”.
3. Choose either the icon “*Letters*” or the “*Step by Step Mail Merge Wizard*”. For this example select the *Step Mail Merge Wizard*.
4. In Step 1 choose *Directory* as the document type and then click on *Next*.
5. In Step 2 elect to *use the current document* and then click on *Next*.
6. In Step 3 under the label *Select Recipients* elect to use *an existing list* and then click on the *Browse button*. When the *Select Data Source dialog box* opens choose the Excel data file *Directory*.
7. In the next dialog box choose Sheet 1 as the data source and then click on the OK buttons.
8. In Step 4 click on *Arrange Your Directory* and then type the label *Name:* followed by pressing the spacebar once. Insert the field called *FName* and then close the *Insert Merge Field dialog box*. Press the spacebar once and then insert the field *LName*. Press the *Enter key once*.
9. Type the label *Phone:* and then press the spacebar. Open the *Insert Merge Field dialog box* and insert the field *Phone*. Close the dialog box.

10. Select the fields *Name* and *Phone* with the mouse pointer.

Right click and choose Paragraph from the side menu.

Set the spacing to “0” and line-spacing to single. Click *OK* and then press the *Enter key* twice.



11. Click on the button *Preview your document* to view the document.
Note: At this point you are viewing only one record in the document window, this changes when you complete the merge. Click on the button *Next: Complete the merge*.
12. Click on the link *To New Document* in the *Merge* section. Click on the menu *All* and then *OK* to complete the merge.

