Word: Mailing Lists and Mail Merge

In this Lesson you are going to apply what you have learned about tables in Word Processing. The process is called Mail Merge and it is an important word processing skill with which every one should be familiar.

Microsoft's *Office* is an integrated suite of programs. This means that the different components of the *Office* software: - *Word*, *Excel*, and *PowerPoint*, for example, are all part of the same system. As a result, you can easily switch from one component to another, cut and paste data between documents.

The steps required to edit, copy, arrange, print, format, cut and paste, and so forth, are more or less the same, whether you are in the word processor, spreadsheet or presentation components of Microsoft *Office*.

You can merge data from a database into different types of *Office* documents to produce any number of versions of a standard document tailored to address individual recipients.

2.0 What is Mail Merging?

Mail merge is a feature in word processing and email programs that allows users to create personalized documents or emails in bulk by combining a template with a data source.

This means you can create one template, like a letter or email, and then automatically populate it with unique information, like names and addresses, for each recipient from a data source like a spreadsheet or database.

Mail Merge Process:

- Mail merge is a way of combining lists of information into a standardised document.
- The most common example people see is on junk mail that comes to you either through the post or via email.
- We are not going to encourage you to create Junk mail however – but to learn to use a useful tool which can speed up your daily processes as long as you remember to use it!

Key benefits of mail merge:

- Efficiency: Saves time and effort by automating the process of creating personalized documents for multiple recipients.

- Personalization: Allows for creating customized communications that feel unique and relevant to each recipient, improving engagement.

- Accuracy: Reduces errors by using a single, accurate data source.

2.1. How does it work?

In order to do a mail merge there are three steps that you have to take.

- Have a list of items to be merged
- Have a document to merge into
- Merge the two

Items one and two can be created in any order but the magic happens when you combine them.

2.2. What is a list?

The list (or data source) can be

- a table in *Word*
- an *Excel* spreadsheet or
- a table or query from a database

Of course, there are a few details about each of these that you have to be careful about but essentially any one of them can be used.

When you create a mail merge the columns headings are used to identify the information that will be placed in the document. Remember that it is not necessary to have anything else other than the headings at the top of the file.

2.3. What kind of document can be used?

Here there are a variety of choices:

- A letter
- Labels
- An email
- A long report
- An invoice

One thing to remember about these documents is that they can be used over and over again; sometimes by using the same list of people or items and sometimes with a different list. When you have mastered the technique you will find all sorts of ways to use it. Once a document has been set up to be a Mail merge file it will continue to be one, automatically linked to the data file you selected.

3.0 Step by step instructions

We are going to work through the process using a straight forward list created in *Word* and a standard letter. Scenario: Sending joining instructions to people going on courses.

3.1. Create the data file or list

1. Open *Word*
2. Create a 7 by 5 table
3. Click on Insert Table , drag over the square to select 7 x 5

In the top row we are going to put the labels for the list, then the details to be merged.

Note: *please make sure that when you are typing up information to be used during a Mail Merge that you make sure that you leave no blank lines/spaces at the top of the document. If you do when you load the recipients then Word will expect the first data to be at the top of the page, if it isn't then Word will state that there is no data to merge!*

Type the following data:

Fname	Sname	Dept	Course	Date	Deposit Paid	Balance	Final Payment
Max	Winter	IT Services	Web Design	28th May 2015	£60.00	£40.00	21st May 2015
Kyle	Sutton	Admin	CSS Essentials	02nd June 2015	£45.00	£45.00	26th May 2015
Leah	Wells	Admin	Web Design	28th May 2015	£60.00	£40.00	21st May 2015
Connor	Blackwell	IT Services	CSS Essentials	02nd June 2015	£45.00	£45.00	26th May 2015
Keira	Hambell	Academic	Photoshop Intro	9th June 2015	£80.00	£60.00	2nd June 2015
Callum	Dobson	Academic	Web Design	28th May 2015	£60.00	£40.00	21st May 2015
Nikki	Almond	Admin	CSS Essentials	02nd June 2015	£45.00	£45.00	26th May 2015
Danni	Woodford	Sciences	Photoshop Intro	9th June 2015	£80.00	£60.00	2nd June 2015

Figure 1: Data for Mail Merge

Save this document in on your Desktop as Student IT Courses Names .   Then close the file.

3.2. Next: create the letter

- Open a blank document in *Word*
- Create something that looks like the letter below see figure 2.

Courses Team IT Courses Banbury Road Oxford 0X16NN

«Fname»«Surname»
«Dept»

Dear «Fname»

Thank you for your recent deposit of «Deposit Paid» to confirm you place on the «Course» course to take place on «Date».

Please can you ensure that the balance of «balance» for your course is paid by the «Final Payment» upon receipt of this payment you will then be forwarded all the details for the course including materials and times.

We look forward to seeing you on the «Date».

Yours sincerely

Figure 2: Mail Merge letter

Save the file as ICT Dept. Courses Letter on the Desktop.

You can see that the letter doesn't make a lot of sense – *yet* – we need to add the codes from the dataset in the places where we want the information.

To do this we must first join the Student ICT Courses Names file to the ICT Dept Courses Letter.

Once the letter and recipients list has been created you will then need to start the Mail merge process.

3.3. Starting the mail merge

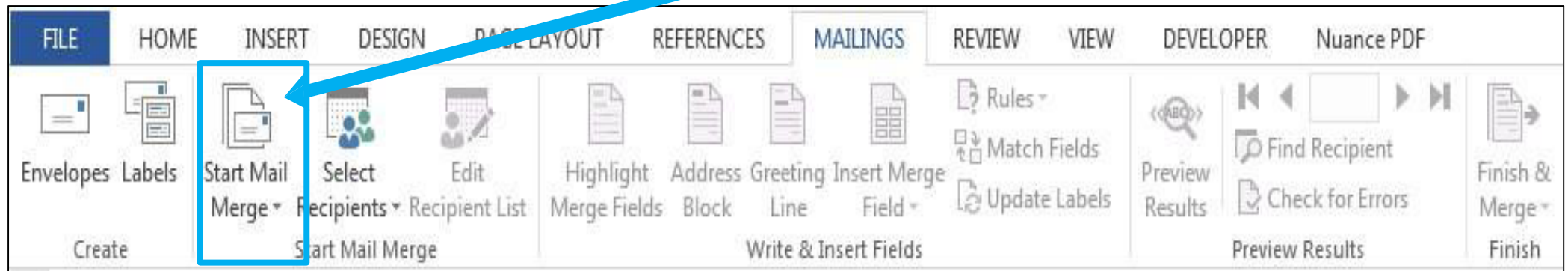On the Mailings ribbon select **Start Mail Merge**:

Figure 3: Mail Merge Ribbon

Next you need to choose letters – you can see from figure 4 that you have the option of creating email messages, envelopes, labels and directory mail merge.
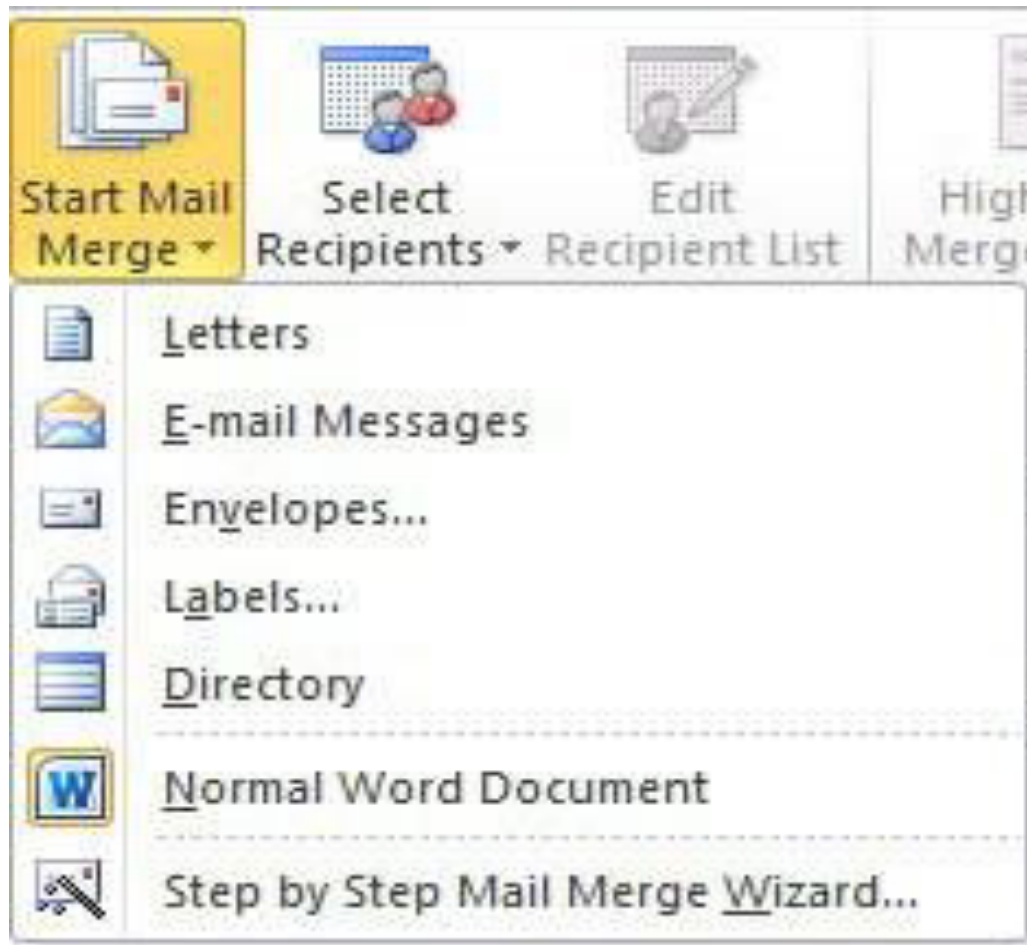

Figure 4: Selecting type of Mail Merge

Next step is to **Select Recipients**, this then gives you the option to either choose a list (data source) that has already been created, type a new list or use your Outlook Contacts for email Mail Merge, see figure 5.
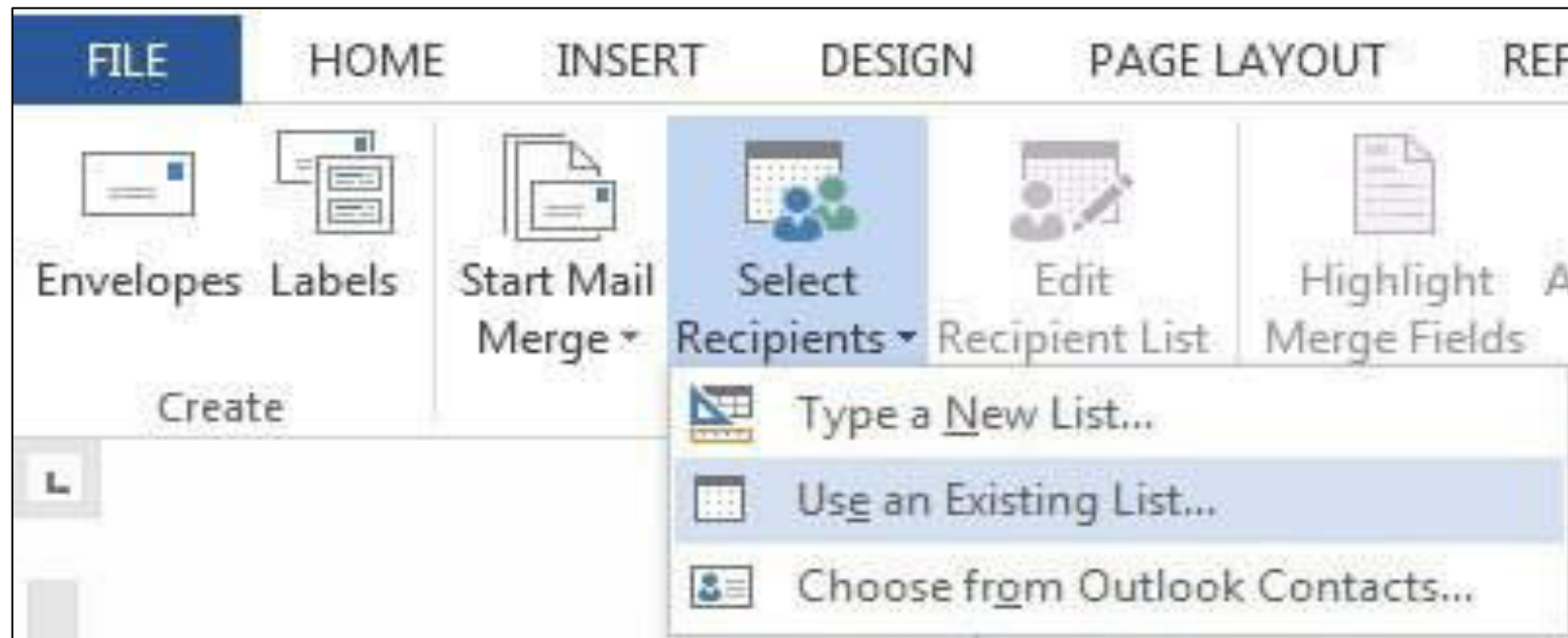

Figure 5: Select Recipients for Mail Merge

- In this instance you will be using an Existing List which you will need to navigate to the student files on the H:/ Drive – the teacher will instruct you where to locate these.

- Navigate to your Student IT Courses Names folder and select the IT Dept Courses Letter file.

- When you have done this you should notice that more of the buttons on the Mailings ribbon are available and are no longer greyed out.
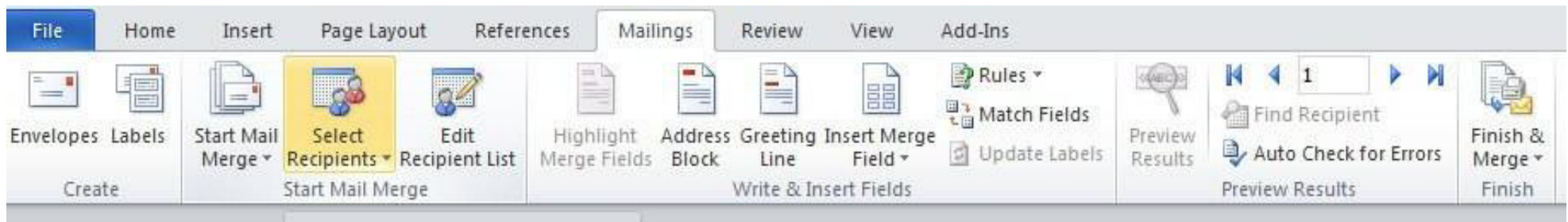
Figure 6: Mail Merge ribbon ready to start merging the data

- With your letter open next position your cursor where you want to place the information in the letter.

- Click in the line <<Fname>> <<Surname>>

- On the Mailings Ribbon Click the bottom half of the Insert Merge Field Button and you will see the list of field names from the Student IT Courses Names file, See figure 7 below; (You get something slightly different if you click on the top part.)
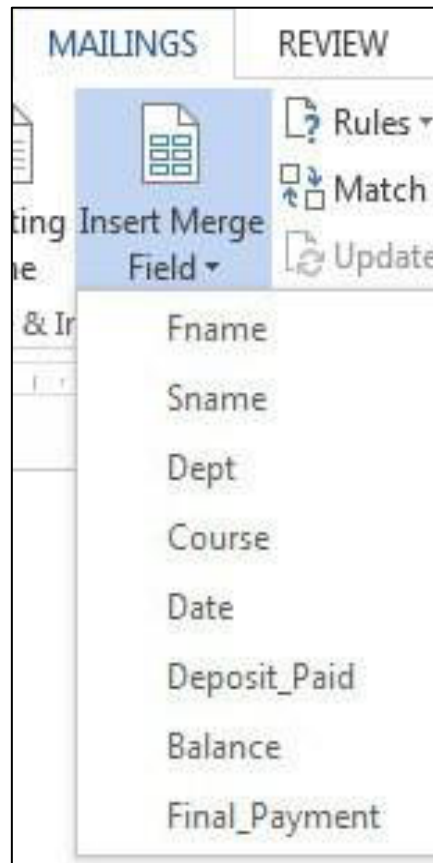
Figure 7: Insert Merge Fields into your document

Click on the First_Name field. This places a code into the document. (Making sure that you remove <<Fname>> and <<Surname>> otherwise they will appear on your merged document.)

- Type a space – if you do not type a space then all the words will just run into each other.

- Click on the Insert Merge Field again and select Last_Name

- Next move down to <<Dept>> then add the Dept field name in the same way

- Move the cursor to the next position, just after the word **Dear**, and then insert the First_Name field again. (You can use the fields more than once in the same document)

Add the Deposit Paid , Course, Date and Final Payment
field codes in the main body of the letter.
Now the document should look like this:

Courses Team
IT Courses
Banbury Road
Oxford
OX1 6NN

«Fname» «Sname»
«Dept»

Dear «Fname»

Thank you for your recent deposit of «Deposit_Paid» to confirm you place on the «Course» course
to take place on «Date».

Please can you ensure that the balance of «Balance» for your course is paid by the «Final_Payment»
upon receipt of this payment you will then be forwarded all the details for the course including
materials and times.

We look forward to seeing you on the «Date».

Yours sincerely

Figure 8: Letter with merged fields highligted

- The codes are shown highlighted in this example this can be turned on or off using the button on thetoolbar. It makes it easier for you to see where the codes have been placed.

- When the document is in this state you can preview what the merged information will look like before you Finish & Merge .

- Click on the Preview Results button on the Review Results section. But remember this is **just** a preview and not the merged file. You can now check the document and make sure that you haven't left out any spaces and that the document looks OK.
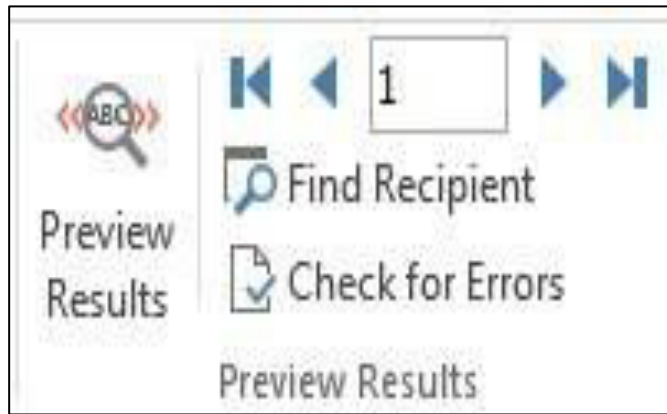
Figure 9: Preview results

3.4. Final step: merge the files

- The final button on the ribbon is the Finish & Merge .
  To create the merged document chose Edit Individual
  Documents. This creates a new file with each record
  merged to a letter. It allows you to check what you have
  got before you print it or email it.

- When you choose this option you are then asked if you want to merge all records or a selection. Merge all for now and the programme creates another file called Letters 1 which contains the combined data.
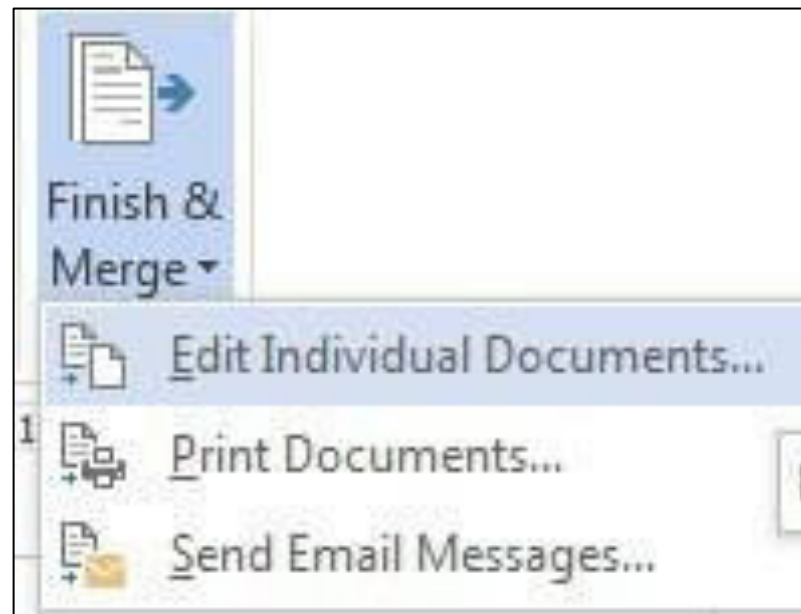

Figure 10: Finish and Merge Options

- You can now check the final document and go ahead and print it if that is to be the final output.

- I think it is always a good idea to check by doing this final merge – even if you are going to output it to an email. It gives you the opportunity to see what will be sent prior to dispatch. As well as give you the opportunity to correct any errors that might be in the document before it is merged and ready to be sent/printed.

4 Variations on the basic merge

- There are variations to this. You can filter the number of items that you are going to merge and you can specify how many records you are going to merge.

4.1. Filtering records

- Sometimes you may have a large dataset and only want to use some of the records within it. It is possible to make a selection from within Mail merge.
- On our example letter we want to send the letters only to the CSS Essentials Class. Click Edit Recipient List and the dialogue box showing the data will appear.
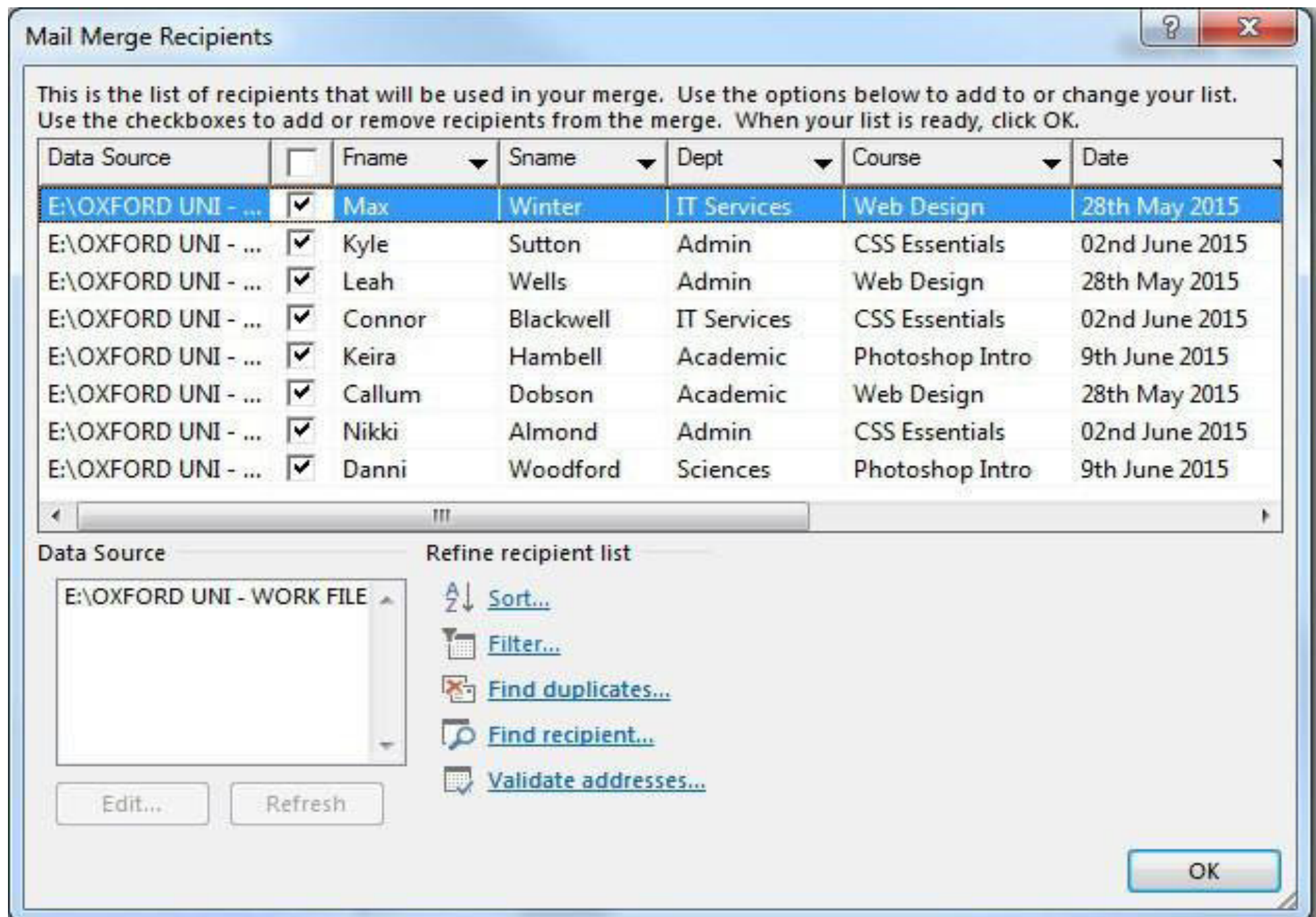
Figure 11: Edit mail merge recipients

- The list we are using is very short so the quickest way of selecting is to use the tick boxes. But we can also use the filter selection to make selections according to the fields or other criteria.

- Clicking the Filter option on the dialog box brings the Query Options Dialog box up. This has two tabs one for Filtering and one for Sorting. The Filter one allows you to set criteria for each field that is in the data set (even if it is not being used in the mail merge document)