

7. Mail Merge

Mail Merge is not about merging shredded letters from tax authorities, but to write a form letter that you "merge" with a list of recipients.

Imagine that you have to send identical letters to 100 recipients. You could choose to write a form letter that you use as a template. On the template you should insert the first recipient's name and address and print the letter. Then you insert the next recipient's name and address and so on.

This process takes a long time, which is why "merge" was invented. In Word, you can mail merge from names and addresses that you type directly into Word, but there are also other possibilities. For instance, you can merge with the names and addresses you may have in your Outlook address book.

The smartest and most versatile option is to merge from a file. Word can enter names and addresses from a variety of file types. Many corporate databases can provide a text file containing lists of employees. You might also have a small member file in Excel or Access from your local residents' association. These can also be entered

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7.1 Part One - Preparation

Whether you are entering data in Word or downloading them from a file the process is the same. We will review the process step by step.

1. Select the Dispatches tab in the Ribbon.
2. Click on the Start Mail Merge button.
3. 3 Click on the Step By Step Mail Merge Wizard in the menu that appears.

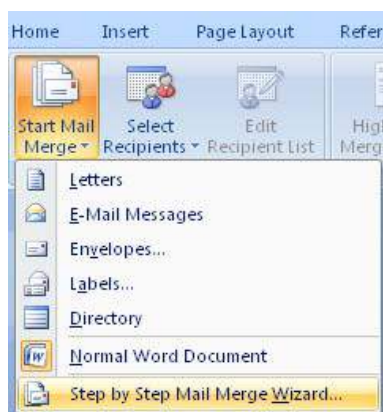


Figure 66: The Start Mail Merge button.

A panel will open on the right side of the screen (see Figure 75). The panel will guide you through the entire process of writing the letter and merge it with your mailing list.

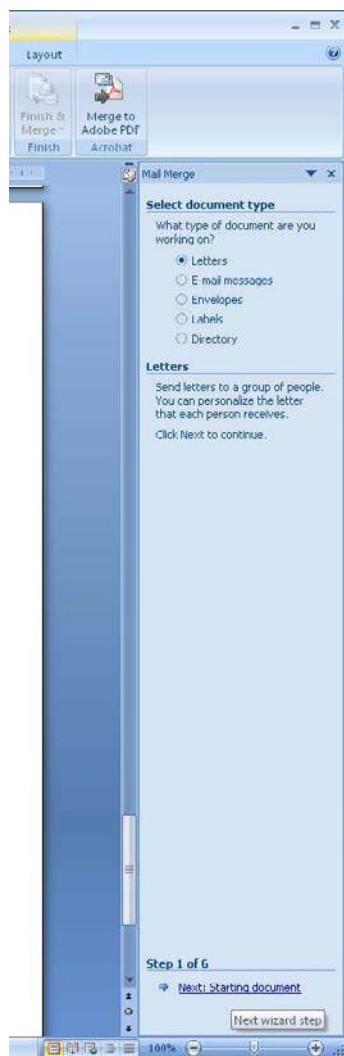


Figure 67: The Panel will guide you through the process.

4. Select Letters on the panel, then click at the bottom of the panel on the text Next: Starting Document.
5. Now you must choose whether you want to work in the current document and whether to use a letter template or an already defined template. Select Start From A Template.
6. Click on Select Template to open an new window.

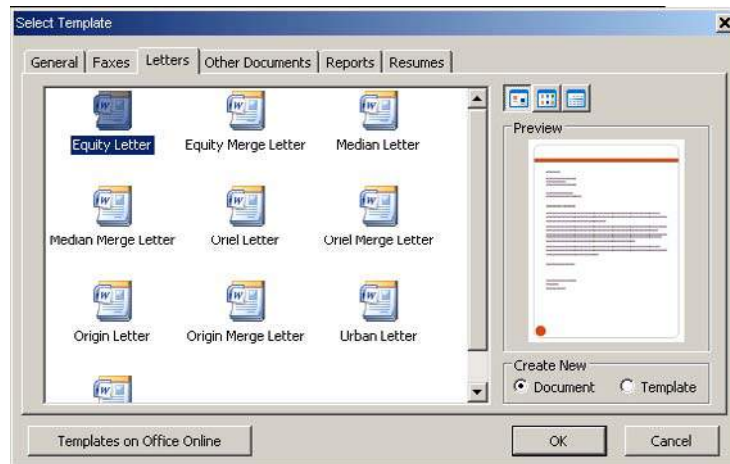


Figure 68: Choice of mail template.

7. In the window, there is a series of Tabs at the top. Select the Letters Tab, then click on the template Aktier brev.
8. Click Ok.

Now we have a letter template that is similar to the one we had in the exercise earlier in the book, where we created a letter from a template.

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- Write your letter but do not fill in the fields "[Enter name of recipient]" and "[Enter address of recipient]". We will return to them shortly

My letter looks like this:

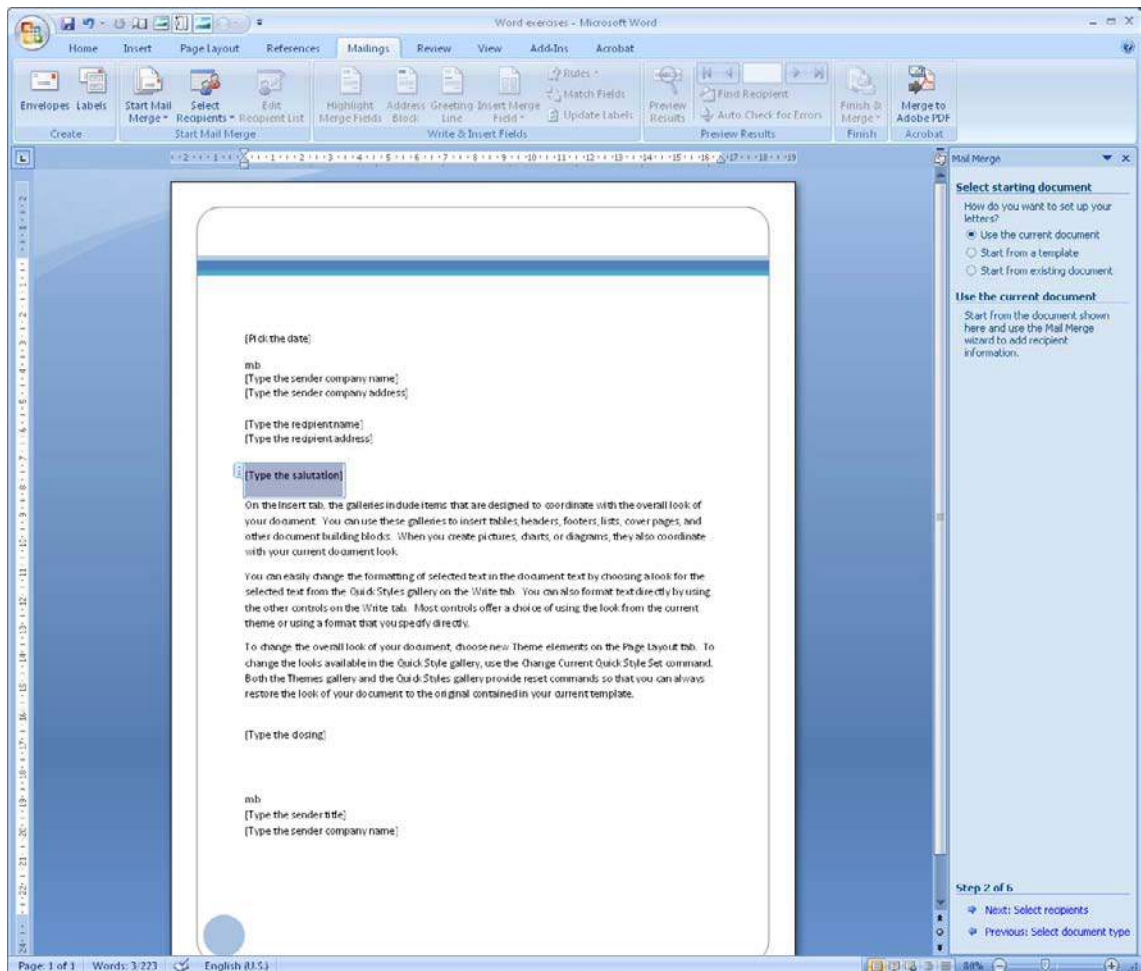


Figure 69: An example of a form letter.

- Click at the bottom of the panel on the text Next: Select Recipients.

7.2 Part Two – Retrieving Merge Data

For this to work properly when you pull data from an Excel file, be sure that the address list is set up sensibly in the spreadsheet. There cannot be a lot of other stuff in the same spreadsheet. The column headings must be in the top row of the spreadsheet, so there is nothing above to confuse Word.

You must also remember to write down the name of the Sheet Tab in the Excel project file where the addresses are. Word will ask for it when you load the addresses.

The following address book is not optimally laid out, because there is a heading above the table of addresses.

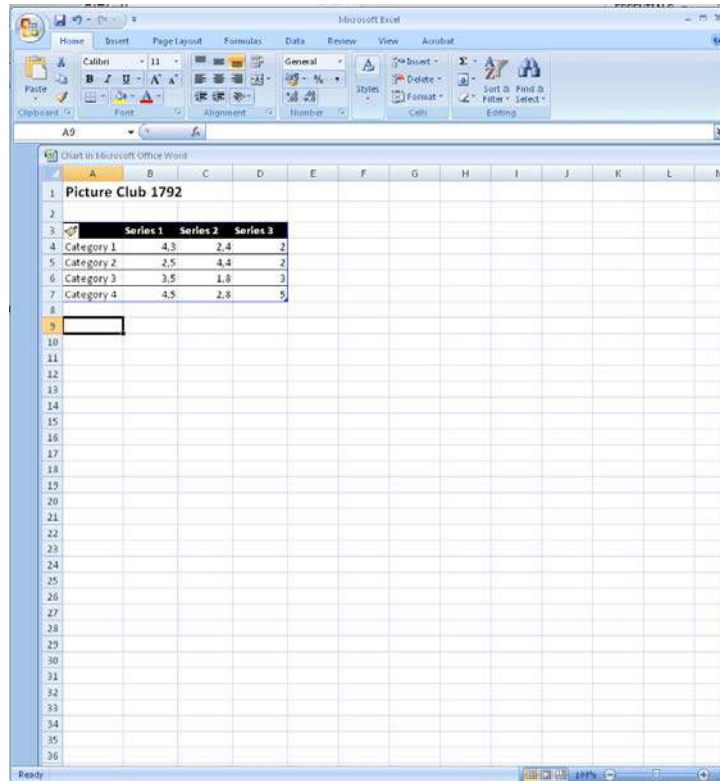


Figure 70: Layout which is not optimal. The heading may confuse Word when the addresses are pulled out.

This address book, however, is perfect. Here is only what you need and nothing else.

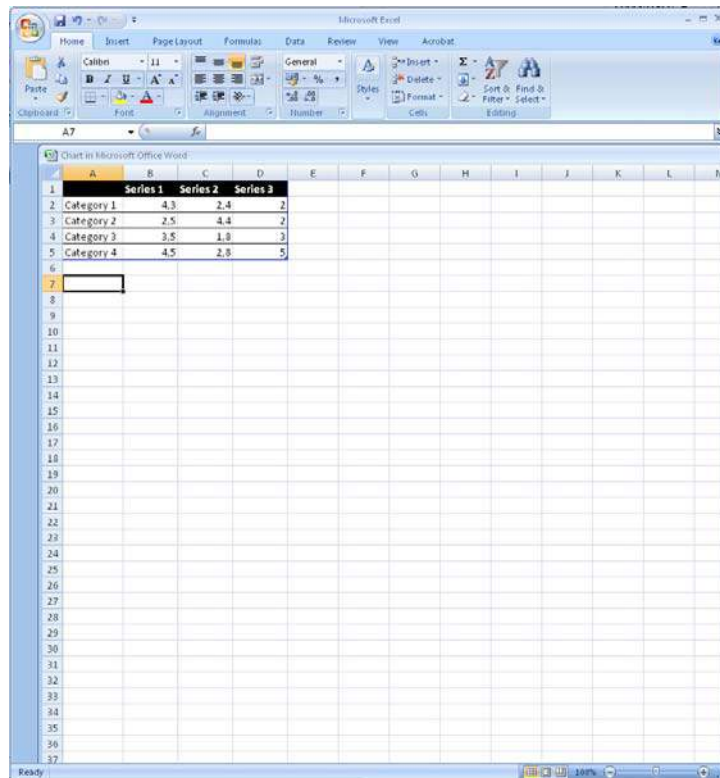


Figure 71: An optimally laid out address book for mail merge.

It would be nice to be able to identify the area in the spreadsheet that Word should read, so you can concentrate on adapting the spreadsheet. But this is not the case. Maybe it will be added in a later version of Word.

11. On the panel, select Use Existing List, then click Browse.
12. Select the Excel file you want, and click the Open button. A new window will open.
13. Select the Spreadsheet Tab that you had your addresses in and click OK. Another window will open where you can see the names and addresses.

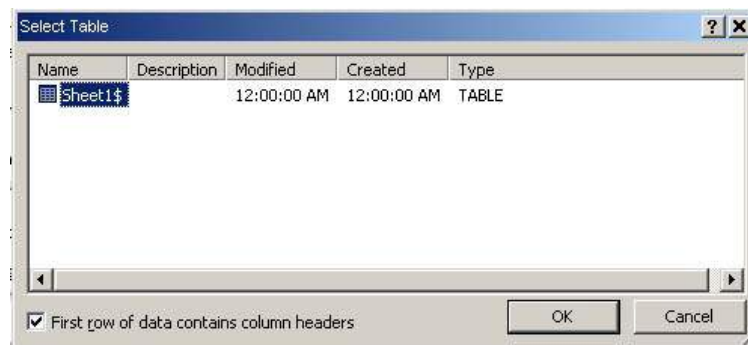


Figure 72: Select the Sheet Tab in the workbook that contains the addresses.

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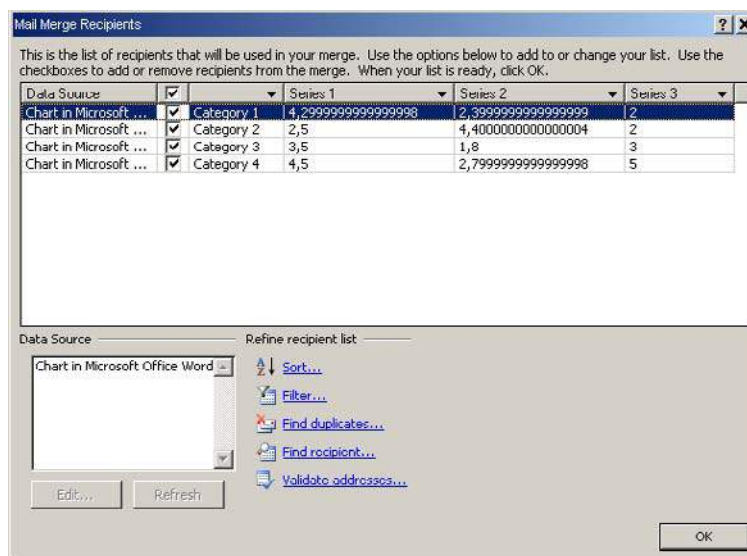


Figure 73: Sort and/or deselect recipients on the list.

In this window you can also deselect recipients by removing the "checkmark" next to them, or you can click the titles to gain access to filtering the list. This allows you to choose that only recipients who meet certain criteria are included in the merge.

If it is not necessary to make a change to the list, click OK.

14. In the panel to the right, click at the bottom of the text Next: Write Letter.

You have now loaded the data that are to be used as a basis for the merge. Instead of retrieving data from Excel, we could have chosen to create a new list in Word. It would require the input of name, address, zip code and city for all recipients. It is therefore only advisable to use this method when there are few receivers, or if you do not already have a file with the recipients' data.

7.3 Complete the Merge

We have written the letter itself, and we have also added a number of recipients either from an Excel file or by entering them, but we are still missing something important. We have not told Word, where the names and addresses should be inserted. This is done by inserting so-called "merge fields". There are markers in the document which indicate that here a first name is added and here an address etc.

In the right panel, there are different options. You can choose to insert an entire address block or a pre-designed greeting; however, I recommend that you insert all merge fields one by one manually. In that way you have better control.

15. Click on [Enter Name Of Recipient] in the letter template.
16. Click More Items in the right panel. A box will open where you can choose between the various merge fields.
17. Double-click on First Name.
18. Double click on Middle Names.

19. Double-click on Last Name.
20. Click Close.

Where it said "[Enter Name Of Recipient]", it must now say <<First Name>> <<Middle Names>> <<Last Name>> ". But remember that Word in this case only does what you tell it to, so do not forget to insert a space between each merge field. Otherwise Johnny B. Good will be renamed Johnny B. Good, and that would not be good at all.

21. Insert spaces between the individual merge fields.
22. Click on "[Write The Recipient Address]" in the letter template.
23. Click on More Items in the panel to the right.
24. Double-click on Address.
25. Double-click on Zip Code.
26. Double click on City.
27. Click on Close.

Once again there are some fields that need a bit of adjustment.

28. Insert a line break between <<Address>> and <<Zip Code>> by putting the cursor between them and pressing ENTER on your keyboard.
29. Insert a space between <<Zip Code>> and <<City>>.
30. Place the cursor right after "Dear" and insert a space.
31. Insert the merge field <<First Name>> the same way you inserted the other merge fields.

Now we are ready to mail merge. Your document should look like the one in Figure 82.

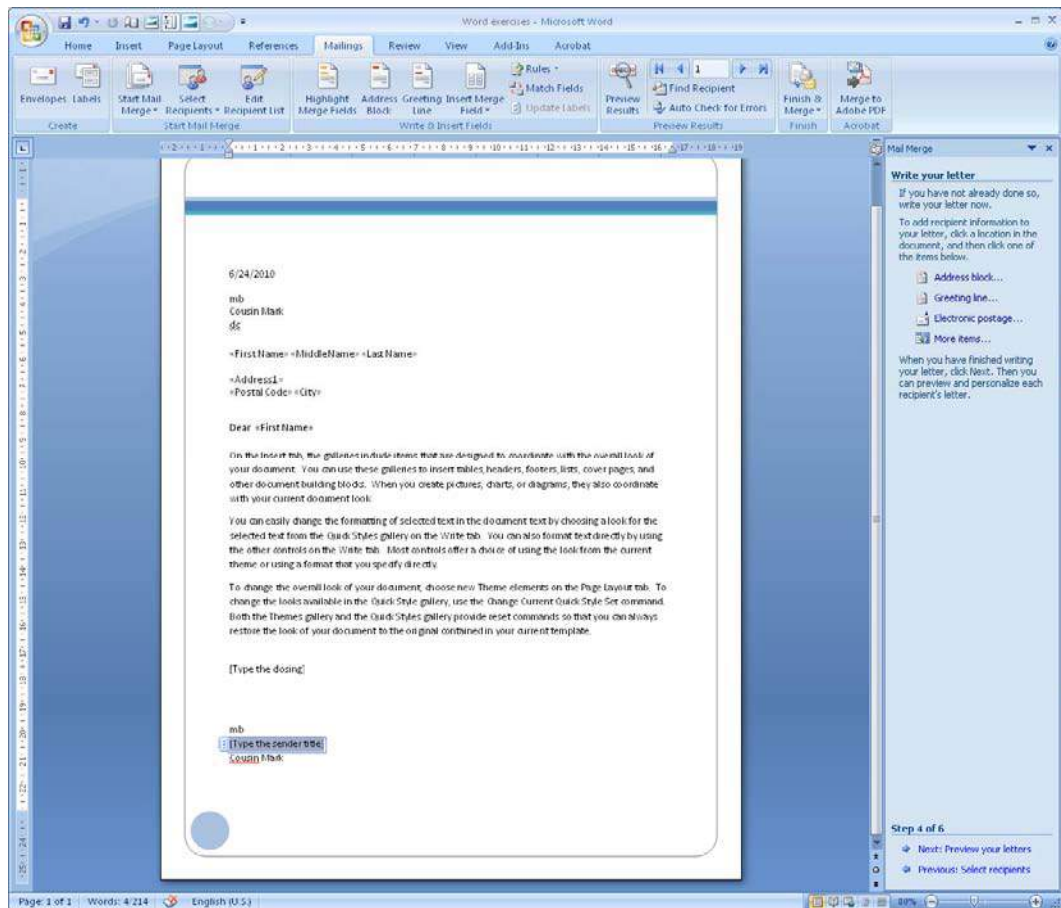


Figure 74: Document ready to merge.

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32. On the panel, click the bottom of the text Next: Preview Your Letters.

You can now see what your letter will look like. On the right panel you can choose between different recipients. Merge fields should have been replaced with real names and addresses.

You can edit the text of the letter at this point. The actual merge is not completed yet, so if you change the text, it will be reflected in the letters to all recipients.

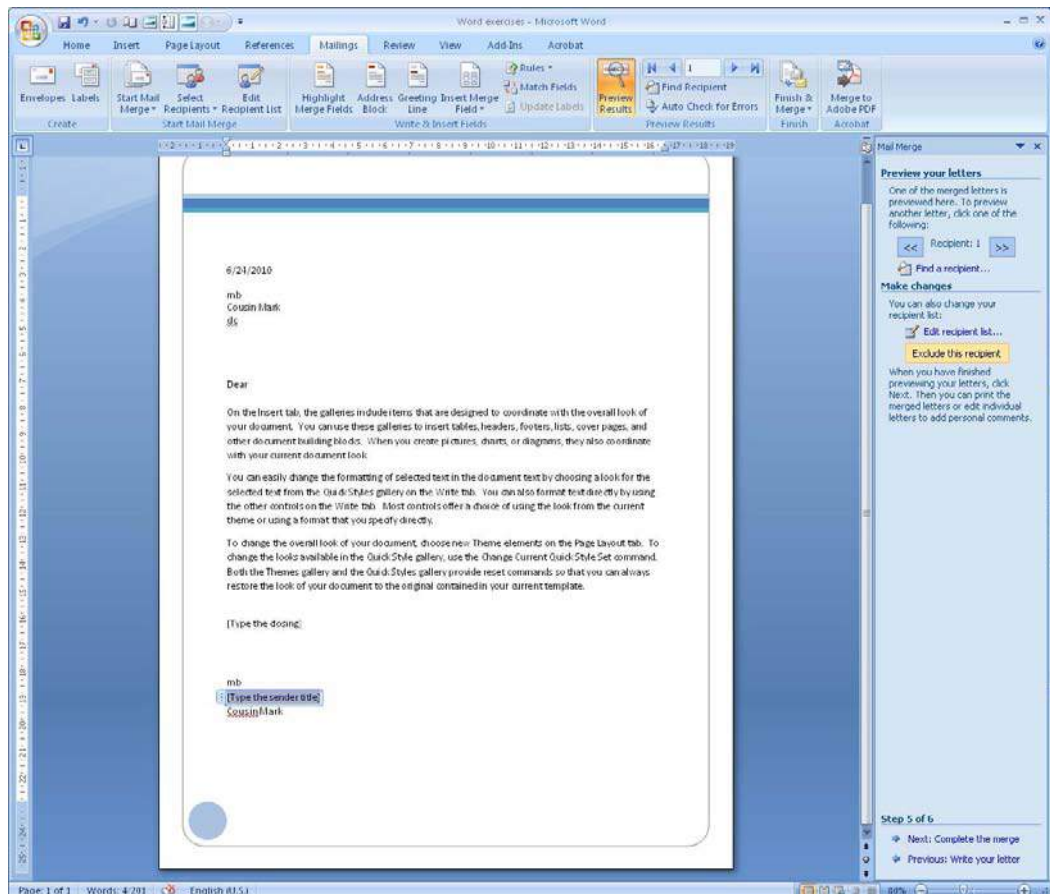


Figure 75: A sample letter to Johnny B. Goode

33. Click on Next: Complete The Merge.

But we are not finished yet. You need to complete one more step because you can select Print and send the merged letters directly to printing. You can also select Edit Individual Letters, which will create a new document that contains all the letters. You can thus edit individual letters if you need it. It also allows you to save all the letters for later use.

34. Click on Edit Individual Letters.
 35. In the box that opens, select All and click OK.
 36.

A document containing your merged letters and a number of pages corresponding to the number of recipients will be created. You can now edit the individual letters, save them or print them.