

# 11

## MAIL MERGE

### 11.1 INTRODUCTION

A common word processing task is to produce periodic mailings to send to different people or agencies connected to you or your profession or your business. The mailing features in Word can help you to organize your address data, get it into a document, and print it out in the desired format. The main uses of Word's Mail Merge features are: You can merge a list of names and addresses to a single letter that can be sent to different people in their names and addresses. Create categories, a single letter with variable information fields in it, or labels. Produce merged documents such as directory lists, invoices, print address lists, or print addresses on envelopes and mailing labels.

### 11.2 OBJECTIVES

After going through this lesson you would be able to

- create form letters, mailing labels, envelopes, or catalogs
- organize address data and merging it into a generic document
- customize a mail merge

### 11.3 TYPES OF DOCUMENTS IN MAIL MERGE

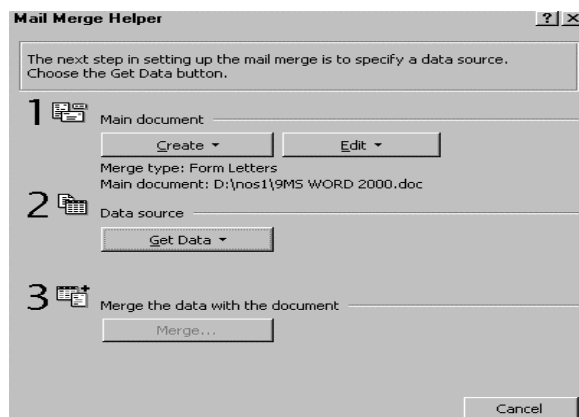
Mail Merge requires three types of documents: (a) Main Document, (b) Data Source, and (c) Merge Document.

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- (a) **Main Document:** In a Mail Merge operation, the personalized document (such as, a standard letter, or envelope, or mailing label) is known as the main document. It is the document containing the text and graphics that stay the same for each version of the merged document - for example, the return address and body of a form letter.
- (b) **Data Source:** Data source is a file that contains the names and addresses or any other information that vary with each version of a mail-merge document. For example, a list of names and addresses for a form letter you want to send to a list of clients or other people.
- (c) **Merge Document:** When you merge the main document with data source, a third document called merge document will be produced. The merge document can be merged to the screen to view letters along with addresses; or directly to the printer to print the letters along with addresses and print addresses on envelopes or labels; or save as some other file that can be used later for printing. Inserting the data or information from the data source in the main document creates the merge document. For example, insert the merge field «City» in a letter document to have Word insert a city name, such as “New Delhi” that is stored in the City data field.

### 11.3.1 Mail Merge Helper

The Mail Merge Helper guides you through the process of doing a mail merge. This involves creating and editing main document; creating a new data source or opening an existing data file; and merging the data source with main document. To use Mail Merge Helper, select **Tools→Mail Merge** command on the menu bar. The **Mail Merge Helper** dialog box appears.



**Fig. 11.1**

## 11.4 CREATING A MAIN DOCUMENT

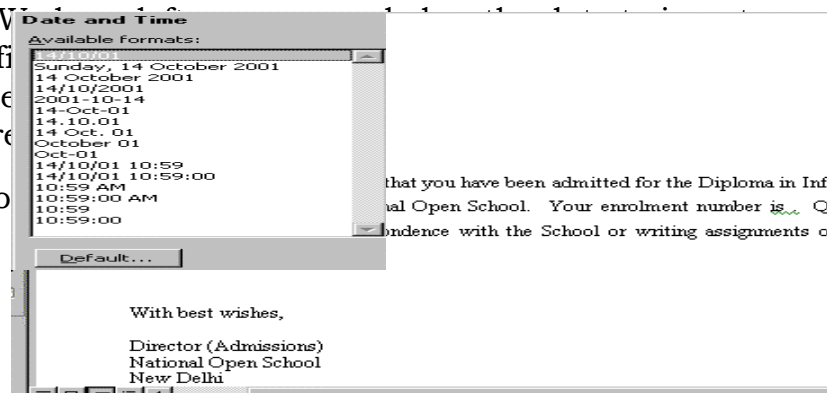
In this section you will learn how to create a main document using Mail Merge Helper, or in your own way. The main document is most often a form letter. However, it can also be a mailing label, an envelope etc. To create a simple letter with variable (current) date, follow these steps:

1. Open a new document. Select **Insert→Date and Time** command on the menu bar. The **Date and Time** dialog box appears, Select date format and click **OK** in the Date and Time dialog box.

**Fig. 11.2**

2. Leave some space (approximately 6 to 7 lines by pressing ENTER key) to insert addresses through merge fields later. Do not type any thing in this space. We will tell you how to insert addresses from data source through data fields later. You can also insert fields anywhere in the body of the letter. The following Figure shows an example of form letter created to send the letters to all the students admitted for DIT programme offered by National Open School. Variable fields like name address field also can be inserted if data source is ready.

3. Type the body of the letter.



**Fig. 11.3**

4. Save your document.

You can also use Mail Merge Helper to create Main Document. Follow these steps to do it:

1. Select **Tools→Mail Merge** command on the menu bar. The **Mail Merge Helper** dialog box appears.
2. Under **Main document**, click **Create**, and then click **Form Letters**. The **Microsoft Word** dialog box appears



**Fig. 11.4**

3. Click **Active Window**. The active window becomes the main document.

Observe that when you choose this helper, the action will be same as opening a new document to create main document.

## **11.5 CREATING A DATA SOURCE**

If you do not have existing database information, you must create your own data source of the fields of information that will be inserted into the letter or any other main document. For example, a Mail Merge letter you have created earlier might require that you have the following fields in address list of students as data source: Name, Address1, Address2, City, State, and PIN Code. In this lesson, you will learn on creating a data source using Mail Merge Helper or using a Word table or importing your Excel Worksheet.

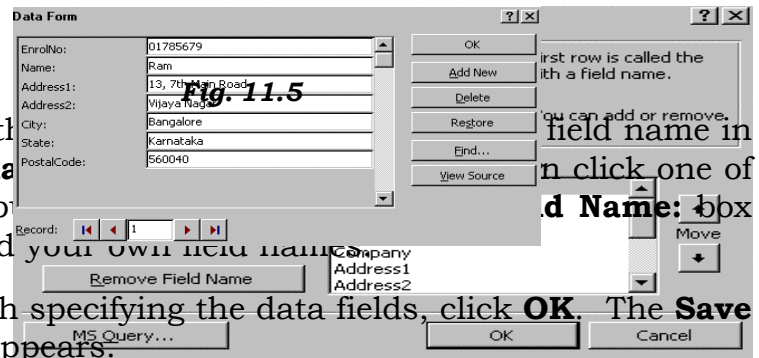
### **11.5.1 Creating a Data Source Using Mail Merge Helper**

You can use the Mail Merge Helper to create a Microsoft Word data source with up to 63 data fields.

Follow these steps to create a data source using Mail Merge Helper: Open a new blank document if you have not yet created the main document or open your existing main document.

1. Select **Tools→Mail Merge** command on the menu bar. The **Mail Merge Helper** dialog box appears.
  - If you have opened a new blank document observe that **Get Data** under **Data source** in the Mail Merge dialog box will not be highlighted. Click on **Create** drop-down menu under **Main document** and then choose **Form Letters** in the drop-down menu. The Word will ask you whether you want to use the **Active Window** or **New Main Document**. Click on **Active Window**. Observe that **Get Data** under **Data source** in the Mail Merge dialog box will be highlighted now.

- If you have opened an existing main document observe that Get Data under Data source in the Mail Merge dialog box will be highlighted.
2. Under Data source, click **Get Data**, and then click **Create Data Source**. The **Create Data Source** dialog box appears.
  3. In the Field names in header row box, specify the data fields that you want to include in the data source:
    - To delete a data field, click the field name in the **Field names in header row** box, and then click **Remove Field Name**.
    - To add a data field, type a new field name in the **Field name:** box, and then click **Add Field Name**.



- To change the field name, click the field name in the **Field names in header row** box, click one of the arrows, type your own field name, and then click **Add Field Name**.
4. When you finish specifying the data fields, click **OK**. The **Save As** dialog box appears.

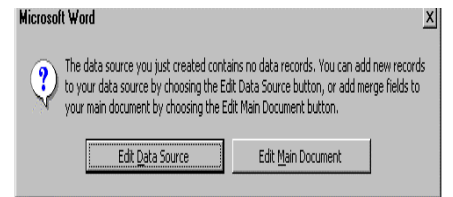



Fig. 11.6

5. Locate the folder that you want to save the data source in, type a file name, and then click **Save As** in the Save As dialog box. The **Microsoft Word** dialog box appears.
6. Click **Edit Data Source** in the Microsoft Word dialog box. The **Data Form** dialog box appears.

Fig. 11.7

7. In the Data Form dialog box, fill in the information for each data record:
  - o To fill in a record, type information for a data field, and then press ENTER to move to the next field. If you don't want to include information for a particular field, press ENTER to skip the field. Don't type spaces in the box.
  - o To start a new data record, click **Add New**.
8. When you finish entering data records, click the **View Source** in the Data Form dialog box. Observe that the data records created will appear in a table format along with **Database** toolbar similar to the one shown in the Figure. Save the data source by clicking **Save** on the Standard toolbar.



EnrolNo	Name	Address1	Address2	City	State	PostalCode
01785679	Ram	13, 7th Main Road	Vijaya Nagar	Bangalore	Karnataka	560040
01785680	Lakshmi	Rampur (Vill)	Shadipur (Post)	Chittoor (Dist)	Andhra Pradesh	571131
01785681	Renu	85A	Pocket-K	Sheikh Sarai-II	Nae Delhi	110030
01785682	Khan	76 Main Road	Vidya Nagar	Lucknow	Uttar Pradesh	

**Fig. 11.8**

9. To return to the main document, click **Mail Merge Main Document** button on the Database toolbar.

### 11.5.2 Editing Existing Data Records

To edit the existing data records in the data source file, follow these steps:

1. Open the data source file and then select **View→Toolbars→Database** command on the menu bar. The **Database** toolbar will appear on the screen.
2. Click on **Data Form** button. The Word will display the data source in the **Data Form** dialog box.
3. To locate a data record that you want to change, move to the record number you want change its contents by clicking the arrow keys or typing the record number; or click **Find**, and then search for information that you know the record contains.
4. Edit the records that you want to change.

- When you finish editing records, click **View Source** in the Data Form dialog box, and then click **Save** button on the Standard toolbar to save changes to the data source.

### 11.5.3 Add New Data Records

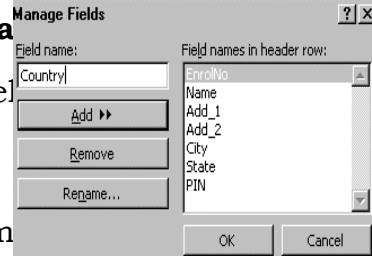
To add new data records in the existing data source file, follow these steps:

- Open the data source file and then select **View→Toolbars→Database** command on the menu bar. The **Database** toolbar will appear on the screen.
- Click on **Data Form** button. The Word will display the data source in the **Data Form** dialog box.
- Click **Add New** button.
- To fill in a record, type information for a data field, and then press **ENTER** to move to the next field.
- Repeat steps 3 and 4 for each new record.
- When you finish adding records, click **View Source** on the Data Form dialog box, and then click **Save** on the Standard toolbar.

### 11.5.4 Add New Data Fields to Existing Data Source File

To add new data fields to the existing data source file, follow these steps:

- Open the data source file and then select **View→Toolbars→Database** command on the menu bar. The **Database** toolbar will appear on the screen.
- Click on **Manage Fields** button. The Word will display the data source in the **Data Form** dialog box.
- In the **Field name** box, type a name for the new data field, and then click **Add**. When you finish adding fields, click **OK**.
- To add the new field information to each record, click **Data Form**, and then edit the records in the **Data Form** dialog box.



**Fig. 11.9**

### 11.5.5 Creating a Data Source Using Word Table

In fact, the Mail Merge Helper guides you step by step through

setting up a Word table that contains your names, addresses, and other data. Instead of taking advantage of Mail Merge Helper, you can also create a data source by entering field names and data directly in a Word table. Follow these steps to do this:

1. Insert a table by selecting **Table→Insert→Table** command on the menu bar as explained in an earlier lesson on Tables.
2. Type the data field names on the top row of the table. Start typing the data records from the second row.

EnrolNo	Name	Add 1	Add 2	City	State	PIN
01785679	Ram	13, 7 <sup>th</sup> Main Road	Vijaya Nagar	Bangalore	Karnataka	560040
01785680	Lakshmi	Rampur (Vill),	Shadipur (Post)	Chittoor (Dist)	Andhra Pradesh	571131
01785681	Renu	85A	Pocket-K	Sheikh Sarai-II	New Delhi	110030
01785682	Khan	76 Main Road	Vidya Nagar	Lucknow	Uttar Pradesh	

3. When you finish entering all the data records, save the table as a Word document. Your data source document is ready.

### 11.5.6 Using Excel Worksheet to Create a Data Source

You can use Excel program to create a data source. Follow these steps do this.

1. Start Excel program. Open Worksheet.
2. Type the data field names on the top row of the worksheet. Start typing the data records from the second row.
3. When you finish entering all the data records, save the worksheet.
4. Select the data field names and data records you typed in the worksheet, and then click on **Copy** button in the standard toolbar. Close the file and then exit Excel program.
5. Open Word program. Open a new document and then click on Paste button. The data will be copied to word document in a table form. Save the document. Your data source document is ready.

## 11.6 MERGING DOCUMENTS

Once if you have created your main document and data source docu-



ment, the next two steps in mail merge are to insert merge fields in the main document and then merge data in the main document. You will learn these two steps in this section:

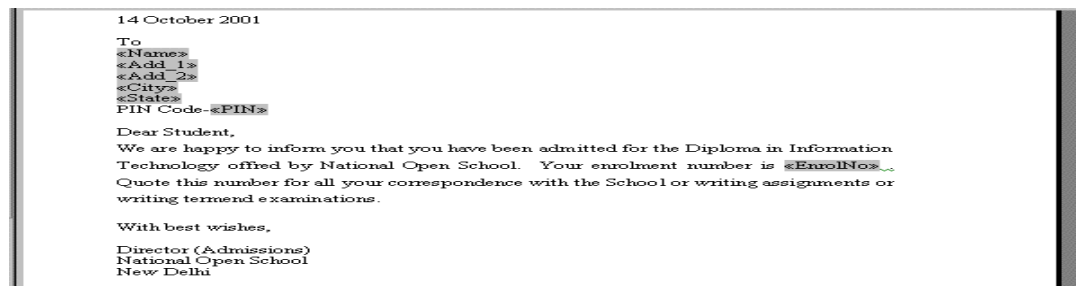
### 11.6.1 Editing the Main Document and Merging (Inserting) Fields in the Main Document

To merge the fields in the main document you may have to do some editing in the main document. Follow these steps to do this:

1. Open the main document.
2. Select **Tools→Mail Merge** command on the menu bar. The **Mail Merge Helper** dialog box appears.
3. Under **Main document**, click **Create**, and then click **Form Letters**. The **Microsoft Word** dialog box appears
4. Click **Active Window**. The active document becomes the main document.
5. To open the data source document, click **Get Data**, and then click **Open Data Source**. The **Open Data Source** dialog box will appear. Choose the data source file that you have earlier created and then click **Open**. The **Microsoft Word** dialog box will appear. Click **Edit Main Document**. Observe that the **Mail Merge** toolbar will appear on the screen.
6. In the main document, place the cursor where you want to merge names, addresses, and other data from the data source. Insert the merge fields by clicking **Insert Merge Field** on the **Mail Merge** toolbar, and then click the field name you want. In our example of student admission letters we have inserted the fields in the space provided for address of students and enrolment number.



**Fig. 11.10**



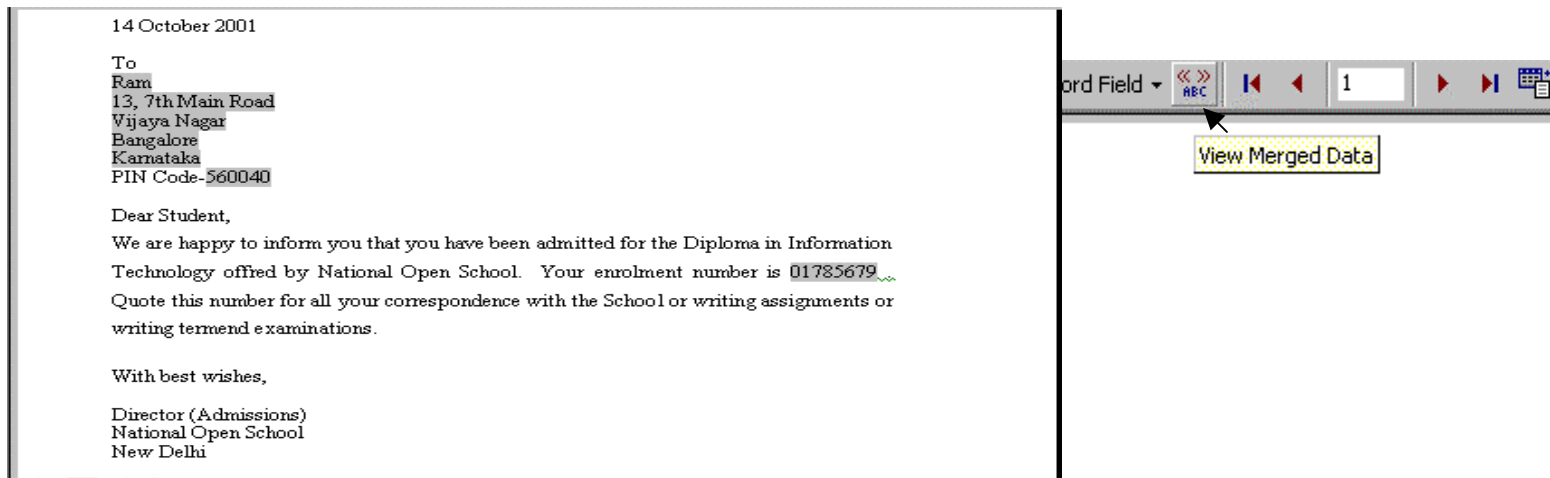
**Fig. 11.11**

- After you complete the main document and insert all of the merge fields, click **Save As** on the **File** menu. Name the document, and then click **Save**. Now your main document will work as merge document.

### 11.6.2 Merging the Data into the Main Document

To merge the data in the main document, follow these steps:

- Open the merge document. If the Mail merge toolbar is not on the screen, select **View→Toolbars→Mail Merge** command on the menu bar.
- Click **View Merged Data** in the Mail Merge toolbar. The merged fields will turn to first data record.



**Fig. 11.12**

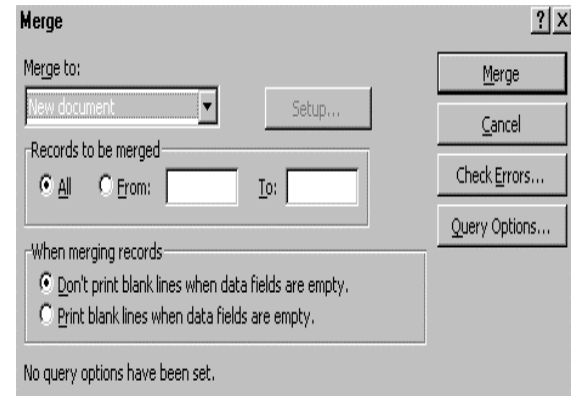
- If you want to see any other merged record, choose the record number either typing the respective number or clicking the arrow marks on the Mail Merge toolbar.

### 11.6.3 Merging the Data and Main Document as a New Document or to Printer/ Electronic Mail/Fax Using Mail Merge Helper

You can also merge the data records to a new document that can be used for printing later or to a printer directly for printing or to send

the merged documents for electronic mailing (or fax) if your computer has the Internet (or Fax) connections. To merge the data to a new document or printer, follow these steps:

1. Open the merge document. Select **Tools→Mail Merge** command on the menu bar.
2. If you want to specify the order in which data is merged, or to merge only part of the data, then you can sort and select data records to merge.
3. Click **Merge** under **Merge the data with the document** in the Mail Merge Helper dialog box. The Merge dialog box will appear.



**Fig. 11.13**

4. Check-mark **All** if you want all records be merged or type the data range in **From** and **To** boxes under **Records to be merged**.
  - Click **New document** in the drop-down box that appears on clicking drop-down button under **Merge To:** in the Merge dialog box. Click **Merge** to store the merged letters in a new document, so that you can review, edit, and print them later. Save this in one of your folders for future use.
  - Click **Printer** button in the drop-down box that appear on clicking drop-down button under **Merge To:** in the Merge dialog box. Click **Merge** to send the selected the merged letters directly to a printer. See that the printer is on to print the letters.
  - Click **Electronic mail** in the drop-down box that appears on clicking drop-down button under **Merge To:** in the Merge dialog box.
  - Click **Setup**. In the **Data field with Mail/Fax address** box, click the data field that contains the e-mail addresses or fax numbers.
  - If you are sending merged documents to e-mail addresses, do one or more of the following:

- o In the **Mail message subject line** box, type the subject of your e-mail message.
- o If you want to preserve the formatting of a merged document, select the **Send document as an attachment** check box. In this case, Word sends each merged document as a separate Word document that's attached to an e-mail message. If this check box is cleared, Word inserts the text of the resulting merged document in the e-mail message.
- Click **OK**. In the **Merge** dialog box, click **Merge**.

#### **11.6.4 Merging the Data and Main Document as a New Document or to Printer Using Mail Merge Toolbar**

You can merge the data records to a new document that can be used for printing later or to a printer directly for printing or to send the merged documents for electronic mailing (or fax) if your computer has the Internet (or Fax) connections. To merge the data to a new document or printer, follow these steps using the Mail Merge toolbar:

Open the merge document. If the Mail merge toolbar is not on the screen, select **View** → **Toolbars** → **Mail Merge** command on the menu bar.

- Click **Merge to New Document** button on the Mail Merge toolbar to store the merged letters in a new document, so that you can review, edit, and print them later.
- Click **Merge to Printer** button on the Mail Merge toolbar to send all the merged letters directly to a printer.
- Click **Merge...** button on the Mail Merge toolbar to view Merge dialog box. Choose the data range and the document to be merged (new document or printer or electronic mail), and then click **Merge** button on the Merge dialog box.

#### **11.7 CREATING MAILING LABELS BY MERGING AN ADDRESS LIST**

If you have already created a data source (say address list) as explained earlier, it is easier to merge this address list with your main document that can be used as mailing labels. You can do this in 4 steps:

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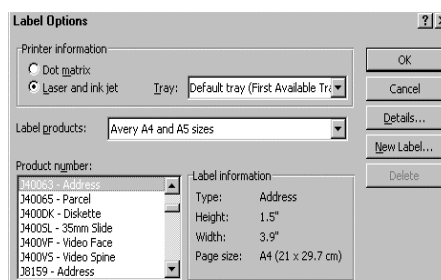
1. **Create the Main Document:** Click **New Blank Document** on the Standard toolbar. Select **Tools**→**Mail Merge** command on the menu bar. Under **Main document**, click **Create**, and then click **Mailing Labels**. The **Microsoft Word** dialog box appears. Click **Active Window**. The active document becomes the main document.

**Fig. 11.14**

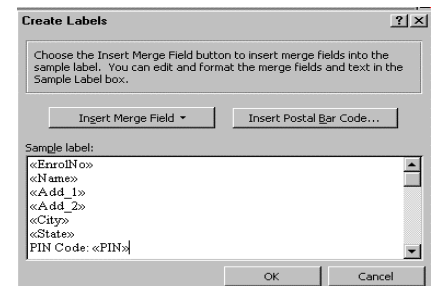
2. **Open the Data Source:** In the **Mail Merge Helper** dialog box, Under **Data source**, click **Get Data**, and then click **Open Data Source**. Select the Word document where you have created your data source (address list), and then click **Open**. The Microsoft Word dialog box appears. Click **Set Up Main Document**. The **Label Options** dialog box appears. (If you don't see the **Label Options** dialog box, click anywhere in the main document, and then select **Tools**→**Mail Merge** command on the menu bar. The Mail Merge dialog box appears. Under **Main document**, click **Setup**. The Label Options dialog box appears.)

**Fig. 11.15**

3. **Select the Label Type and Insert Merge Fields:** In the **Label Options** dialog box, Select the type of printer and labels you want to use, and then click **OK**. (If the type of labels that you want to use is not listed in the **Product number** box, you can create your own custom labels.) The **Create Labels** dialog box appears.



**Fig. 11.16**

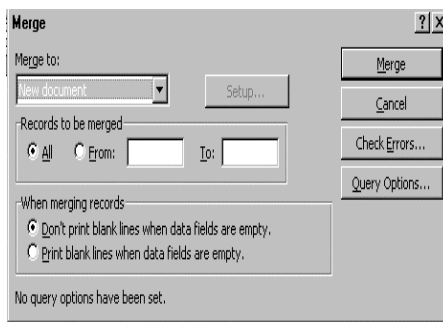


**Fig. 11.17**

In the **Create Labels** dialog box, insert merge fields where you want to merge addresses from the data source. To insert a merge

field, click **Insert Merge Field**, and then click the field name you want. Click **OK**. The Mail Merge Dialog box appears.

4. **Merge the Data into the Main Document:** In the **Mail Merge Helper** dialog box, click **Merge** under **Merge the data with the document**. The **Merge** dialog box appears. If you want to send the merged labels directly to a printer, click **Printer** in the Merge to box, and then click **Merge**. On the other hand, if you want to store the merged labels in a new document, (so that you can review, edit, and print them later) click **New Document** in the Merge to box, and then click **Merge**.



**Fig. 11.18**

**Fig. 11.19**

## 11.8 CREATING ENVELOPES BY MERGING AN ADDRESS LIST

If you have already created a data source (say explained earlier, it is easier to merge this address list into envelopes so that you can directly print the addresses (instead of printing the address labels on stickers and then pasting them on the envelopes) for mailing purpose. You can follow the following steps:

1. **Create the Main Document:** Click **New Blank Document** on the **Standard toolbar**. Select **Tools**→**Mail Merge** command on the **menu bar**. Under **Main document**, click **Create**, and then click **Envelopes**. The Microsoft Word dialog box appears. Click **Active Window**. The active document becomes the main document.



**Fig. 11.20**

2. **Open the Data Source:** In the **Mail Merge Helper** dialog box, Under **Data source**, click **Get Data**, and then click **Open Data Source**. Select the Word document where you have created your data source (address list), and then click **Open**. The **Microsoft Word** dialog box appears. Click **Set Up Main Document**. The **Envelope Options** dialog box appears. (If you don't see the **Envelope Options** dialog box, click anywhere in the main document, and then select **Tools→Mail Merge** command on the menu bar. The Mail Merge dialog box appears. Under **Main document**, click **Setup**. The Label Options dialog box appears.)

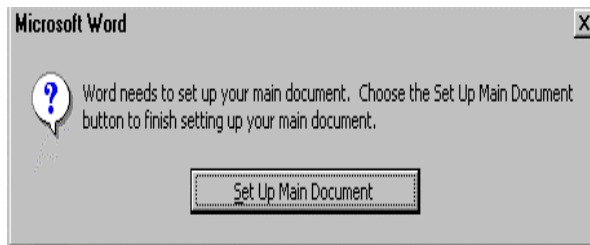


Fig. 11.21

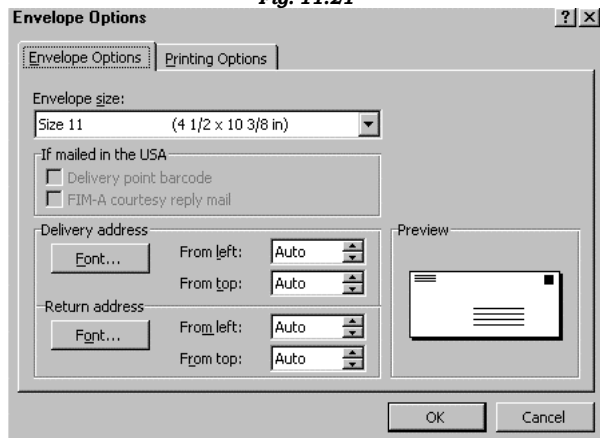
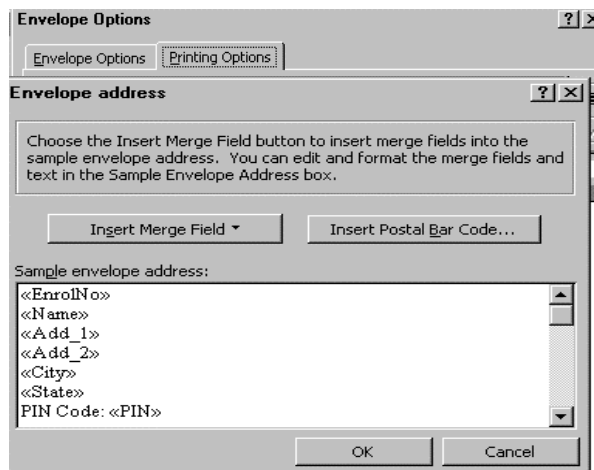


Fig. 11.22

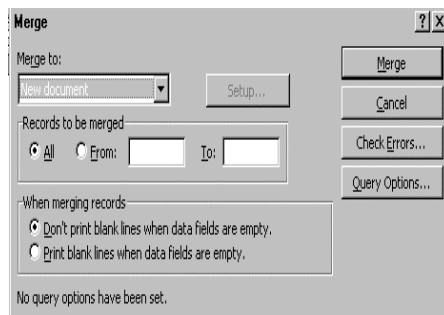
3. **Select the Envelope Options and Insert Merge Fields:** On the **Envelope Options** tab, select the envelope size you want from a variety of predefined sizes given under **Envelope size:** drop down box, and adjust the address format and position on the envelope. (If the envelope size that you want to use is not listed in the **Envelope size:** box, you can create your own custom envelope by selecting **Custom size** under **Envelope size:** drop down box in the Envelope Options dialog box.) Click on the **Printing Options** tab, and make sure that the selected envelope feed options are correct for your printer, and then click **OK**. The **Envelope address** dialog box appears.

In the **Envelope address** dialog box, insert merge fields where you want to merge addresses from the data source. To insert a merge field, click **Insert Merge Field**, and then click the field name you want. Click **OK**. The **Mail Merge Dialog** box appears. In the Mail Merge Helper dialog box, under **Main document**, click **Edit**, and then click the envelope main document. Type the return address in an appropriate place by inserting **Text Box** that lies on the **Drawing** toolbar. (If you don't see the Drawing toolbar, select **View**→**Toolbars**→**Drawing** command on the menu bar. The Drawing toolbar appears). Verify the return address, or delete it if the envelopes have a pre-printed return address.



**Fig. 11.23**

4. **Merge the Data into the Main Document:** In the **Mail Merge Helper** dialog box, click **Merge** under **Merge the data with the document**. The **Merge** dialog box appears. If you want to send the merged envelopes directly to a printer, click **Printer** in the **Merge to:** box, and then click **Merge**. On the other hand, if you want to store the merged envelopes in a new document, (so that you can review, edit, and print them later) click **New Document** in the **Merge to:** box, and then click **Merge**.



**Fig. 11.24**



*Fig. 11.25*

### 11.9 CREATING A CATALOG

If you have already created a data source (say address list) as explained earlier, it is easier to merge data to a single document, such as a catalog, membership directory, etc. You can do this in 4 steps:

1. **Create the Main Document:** Click **New Blank Document** on the Standard toolbar. Select **Tools**→**Mail Merge** command on the menu bar. Under **Main document**, click **Create**, and then click **Catalog**. The **Microsoft Word** dialog box appears. Click **Active Window**. The active document becomes the main document.

*Fig. 11.26*

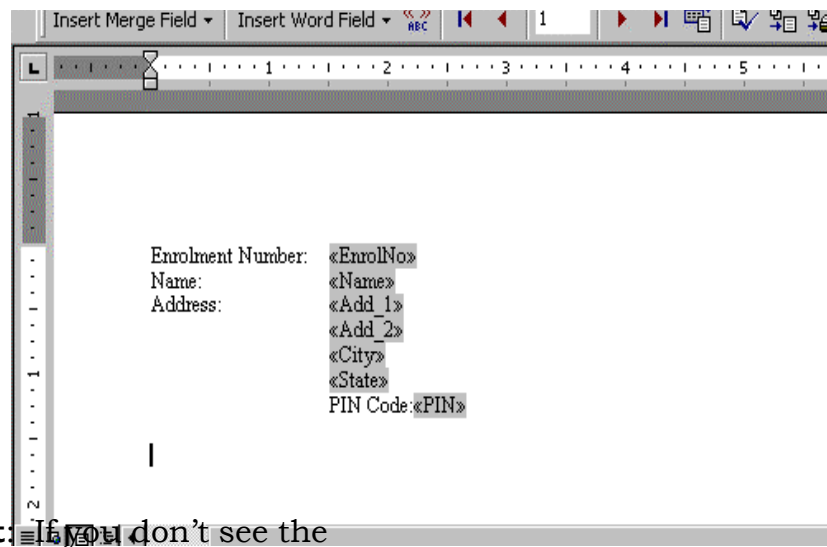
2. **Open the Data Source:** In the **Mail Merge Helper** dialog box, Under **Data source**, click **Get Data**, and then click **Open Data Source**. Select the Word document where you have created your data source (address list), and then click **Open**. The **Microsoft Word** dialog box appears. Click **Edit Main Document**.

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*Fig. 11.27*

3. **Edit the Main Document and Insert Merge Fields:** In the main document, type any text that you want to repeat for each item in the catalog. For example, include labels such as Enrolment Number. At this point, don't include text (such as headers, footers, and table column headings) that you want to print only once in the resulting catalog document.

Insert merge fields where you want to merge data from the data source. To insert a merge field, click in the main document, click **Insert Merge Field** on the **Mail Merge** toolbar, and then click the field name you want. For example, insert a merge field after an item label, such as Enrolment Number: «EnrolNo». Leave some space (say one or two lines by pressing ENTER key) to differentiate between two records when they are actually merged in the main document. After you complete the main document and insert all of the merge fields, click **Save As** on the **File** menu. Name the document, and then click **Save**.



**Fig. 11.28**

4. **Merge the Data into the Main Document:** If you don't see the **Mail Merge** toolbar, select **View**→**Toolbars**→**Mail Merge** command on the menu bar. The **Mail Merge** toolbar appears. Click on **Merge to New Document** button on the **Mail Merge** toolbar.

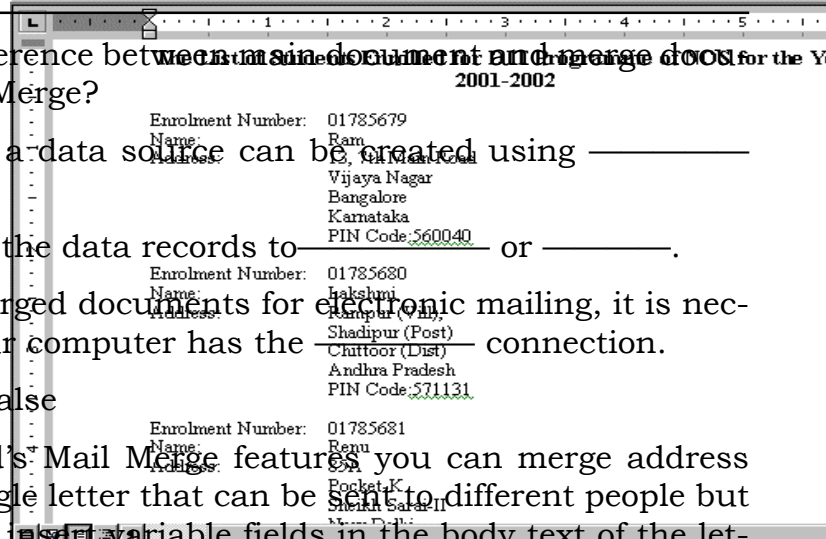
In the resulting catalog document, add headers, footers, and any other text that you want. For example, you can add the heading 'The List of Students Enrolled for DIT Programme of

NOS for the Year 2001-2002'. To print the catalog document, click **Print** on the **Standard** toolbar.

**Fig. 11.29**

**INTEXT QUESTIONS**

1. What is the difference between main document and merge document in Main Merge?
2. In Mail Merge, a data source can be created using \_\_\_\_\_ or \_\_\_\_\_.
3. You can merge the data records to \_\_\_\_\_ or \_\_\_\_\_.
4. To send the merged documents for electronic mailing, it is necessary that your computer has the \_\_\_\_\_ connection.
5. State True or False
  - a. Using Word's Mail Merge features you can merge address list in a single letter that can be sent to different people but you cannot insert variable fields in the body text of the letter.
  - b. It is not possible to send the merged documents for fax without Fax machine connected to your computer.
  - c. The data records created in a worksheet using Excel cannot be used as a data source for Mail Merge.



## **11.10 WHAT YOU HAVE LEARNT**

In this lesson you learnt about the use of mail-merge in MS-Word environment. Now you can merge a list of names and addresses to a single letter that can be sent to different people in their names and address. Secondly, you can create categories, a single letter with variable information fields in it, or labels. Finally, you can produce merged documents such as directory lists, invoices and address lists. These addresses can be printed on envelopes or mailing labels.

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## **11.11 TERMINAL QUESTIONS**

1. Briefly explain the following: (a) Main document, (b) Data source, and (c) Merge document.
2. Write any two features of Mail Merge.
3. Write steps in creating a main document for form letter.
4. Explain steps in editing existing data records in Mail Merge.
5. How do you create a data source using Word table?
6. Write steps in using Excel worksheet as a data source for your Mail Merge.

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## **11.12 KEY TO INTEXT QUESTIONS**

1. In a Mail Merge operation, the personalized document (such as a letter) is called as the main document. When you merge the main document with data source, a third document called merge document will be produced.
  2. Mail Merge Helper or Word Table.
  3. A new document or printer.
  4. Internet
  5. (a) False, (b) True, (c) False
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