

Microsoft Word 2010

Mail Merge

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Archdiocese of Chicago

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MICROSOFT WORD 2010 MAIL MERGE

ABOUT MAIL MERGE

You use Mail Merge to create a document that populates the output with information from a data source. Mail merges are most often used to create Form Letters but can also be used to create mailing labels, nametags, card catalog cards, and directories.

A mail merge requires two files that are combined to create the final output of the merge.

The two files are:

- The Main Document which contains the "placeholders" for content that will be populated when the merge is run
- The Data Source that contains the actual data that is put into the main document's placeholders

MAIL MERGE STEPS

Executing a mail merge involves three steps.

1. Setting up your main document
2. Attaching to your data source
3. Inserting merge fields
4. Refining your data source
5. Completing the merge

You set up your mail merge using features on the Mailings ribbon.

DATA SOURCES

One of the most important pieces of a mail merge is the data source. The data source contains the individual records that will be merged into your final output.

EXISTING DATA SOURCES

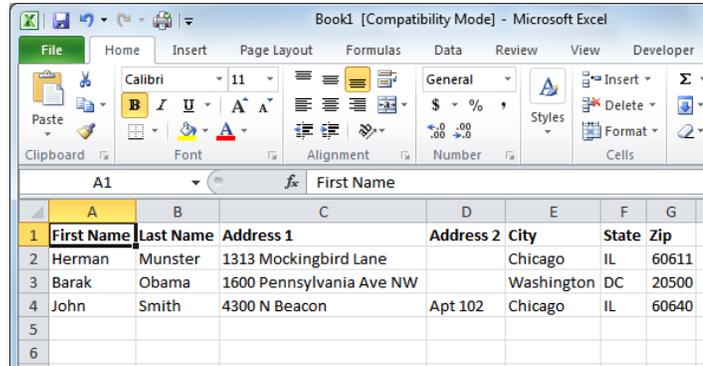
Almost any file that Word can parse into rows and columns can be used as a data source for a merge. The most common data sources are Excel spreadsheets and Access database. You can use other file-types as long as they are formatted correctly.

NEW DATA SOURCE

If you don't already have a data source, you'll need to create a new data source. The easiest way to create a new mail merge data source is by using Microsoft Excel.

To create a data source in Excel:

- Start Excel
- Enter column heading names in Row 1
- Select all of row 1 and apply Bold to the entire row
- Enter your records beginning on row 2
- Save the file as normal



The screenshot shows the Microsoft Excel interface with a spreadsheet containing a data source. The spreadsheet has the following data:

	A	B	C	D	E	F	G
1	First Name	Last Name	Address 1	Address 2	City	State	Zip
2	Herman	Munster	1313 Mockingbird Lane		Chicago	IL	60611
3	Barak	Obama	1600 Pennsylvania Ave NW		Washington	DC	20500
4	John	Smith	4300 N Beacon	Apt 102	Chicago	IL	60640
5							
6							

"MASTER" DATA SOURCE

You should avoid, when possible, creating brand new data sources for mail merges. When you can, you should simply reuse existing data sources. That way, if information in the data source changes, you only need to update one file (instead of several files).

Add additional columns to the data source that will let you specify which records you want to merge in different situations.

MAILINGS RIBBON

When you run a mail merge, you will use tools available on the Mailings ribbon.

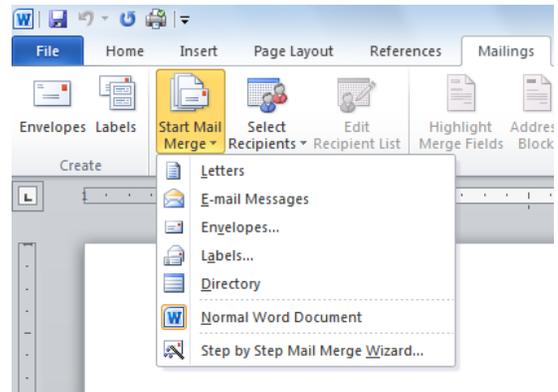


START MAIL MERGE GROUP

The Start Mail Merge groups lets you choose the type of merge and sets up your data source for the merge.

START MAIL MERGE

The Start Mail Merge button establishes the type of merge you are creating or lets you restore a mail merge main document to a normal document (specifying that the document is NOT part of a mail merge).



LETTERS

Letters are the most common type of mail merge. When specifying a Letters merge, each record's letter begins on a new page. The resulting output contains 1 section for each record in the merge.

E-MAIL MESSAGES

E-mail merges do not work in our network configuration.

ENVELOPES

Envelope merges can be incredibly risky. When you print an envelope merge, you are printing directly to envelopes. Many printers don't print envelopes reliably. You would need to "babysit" the printer during the print job to deal with paper-jams and misfed envelopes.

LABELS

Labels are often a better alternative to envelopes. Label merges can be used for mailing labels, name badges, index cards, etc.

DIRECTORY

A directory (previously called catalog) does NOT force a new page for each record in the merge. Instead, the information will be repeated until the page is filled.

NORMAL WORD DOCUMENT

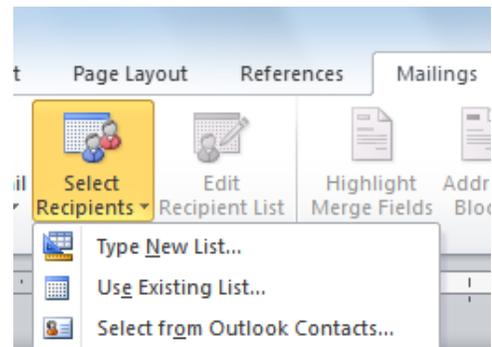
Choosing Normal Word Document detaches the document from a mail merge. This restores the document to a non-Mail Merge document.

STEP BY STEP MAIL MERGE WIZARD

This option walks you through the steps of a mail merge via a panel that opens on the right-hand side.

SELECT RECIPIENTS

The next button on the Start Mail Merge group lets you select your data source or create a new data source. Remember, if you don't already have a data source for your merge, the best option is to create your data source using Excel.



TYPE NEW LIST

Choosing Type a New List lets you create a new, Microsoft Office Address List. This file is actually a database file that uses the older (pre-Office 2007) Microsoft Access database format.

USE EXISTING LIST

Use Existing List lets you select an existing file to use for your mail merge. By default, this will show all of the file types that *could* be used as a mail merge data source. However, just because a file is the correct type does NOT mean it's formatted correctly for a mail merge.

SELECT FROM OUTLOOK CONTACTS

The functionality does NOT work within our environment.

EDIT RECIPIENT LIST

Edit Recipient List lets you choose specific records from your data source to use in your merge, apply filters and sorting on the data source, and edit the data source (*if* it's a Microsoft Office Address List).

WRITE AND INSERT FIELDS

Your next step in your merge is to create the main document of the merge. You create main document by adding the constant information to will appear for each record and merge fields.

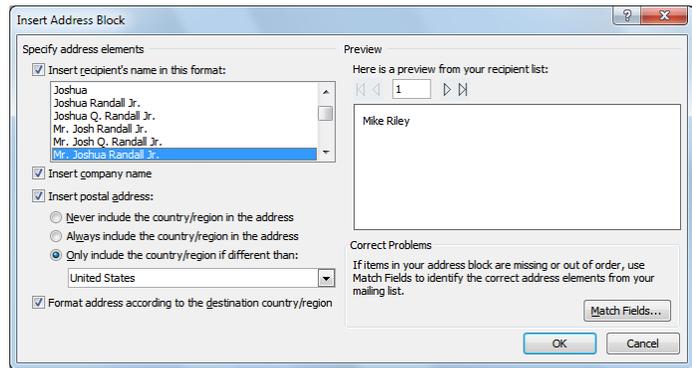
HIGHLIGHT MERGE FIELDS

Highlight Merge Fields is a toggle button that will apply shading to the merge fields in the document. This will make it easier to locate the merge fields.

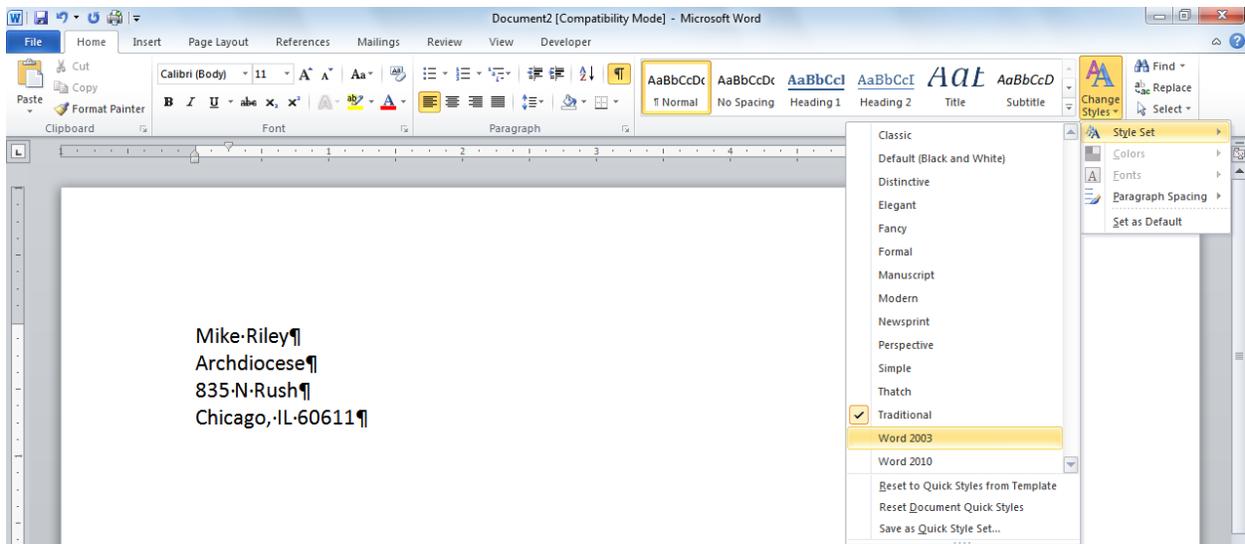
ADDRESS BLOCK

The Address Block button lets you quickly add an address block to your merge. You choose the style for the address block. Word automatically handles any inconsistencies in your data (for example, if you choose the recipient name and spouse name, Word will automatically fix any blocks for recipients who don't have a spouse).

You can use the Match Fields button to match the fields in your data source with the options that the Address Block is looking for.



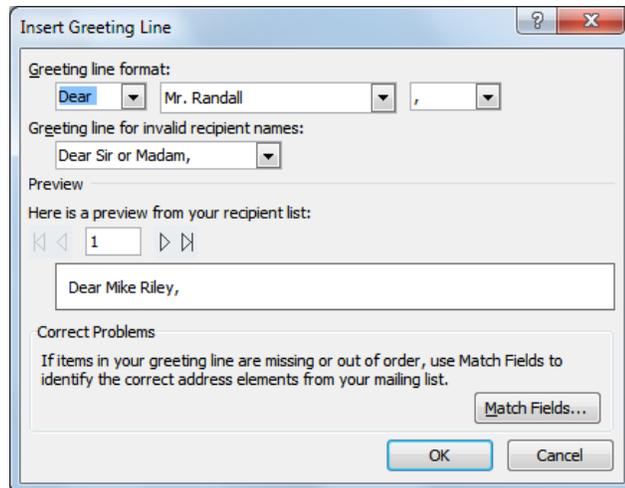
When inserting an Address Book, Word applies the Normal style to the entire block. The Normal style in most of the provided templates includes extra space between paragraphs. To collapse this space, either select the Address Block and choose the No Spacing style (from the Home tab) or set the entire document's Style Set to either Traditional or Word 2003.



GREETING LINE

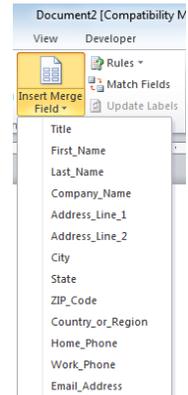
Greeting Line lets you add a greeting line to your merge. Choose the style of the greeting and the greeting text with the data does not contain the necessary data for the greeting.

You can use the Match Fields button to match the fields in your data source with the options that the Greeting Line is looking for.



INSERT MERGE FIELD

You may want to include additional fields from your data source within the body of your merge. To add data from your data source, click Insert Merge Field and select the desired field from your data source.

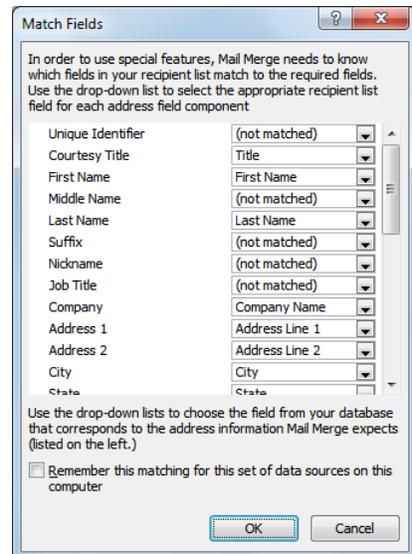


RULES

Rules let you specify conditions to be met to include/exclude information from the merge. The most common rule is *If...Then...Else* within Directory merges.

MATCH FIELDS

The Match Fields button lets you map fields in your data source to the default names used for the Address Block and Greeting Line tools.

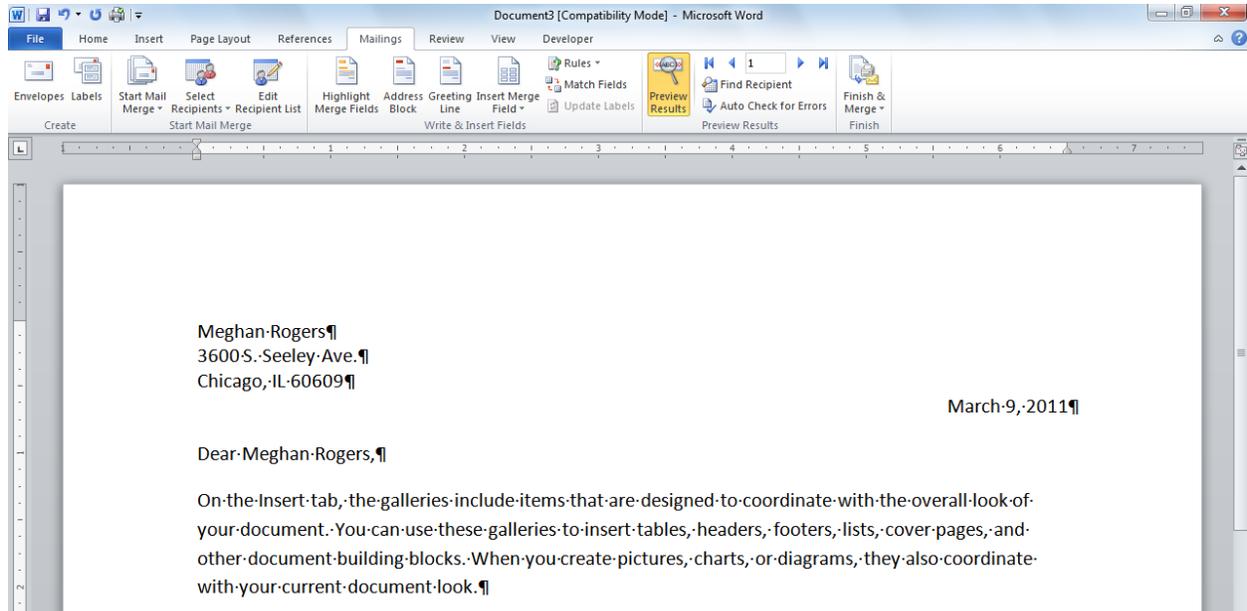


UPDATE LABELS

When creating a label merge, you create a prototype label on your first label. Clicking Update Labels applies the content of the first label to the rest of the labels on the page. **YOU MUST CLICK THIS WHEN CREATING LABELS!** Otherwise, you will only have one label per page.

PREVIEW RESULTS

Preview Results lets you view a sample of your merge before actually running the merge. This is especially useful when you have a large number of records in your data source.



NAVIGATING

When previewing a merge, you can use the arrows and record selector to navigate among the records in the merge. This is especially helpful if your data is inconsistent AND you are using If/Then/Else rules.

FIND RECIPIENT

You can use Find Recipient to quickly locate a specific record from your data source. This is especially helpful if you know that a particular record has data that other records in the data source don't.

AUTO CHECK FOR ERRORS

Auto-check for errors lets you simulate a merge to view any problems that might occur within the merge.

FINISH AND MERGE

The last step in a mail merge is to finish the merge.



EDIT INDIVIDUAL DOCUMENTS

Edit Individual Documents outputs the resulting merge to a new document. This is the recommended choice for any merge that you are going to print.

You can edit individual letters/labels/etc in the resulting document to personalize them for specific individuals or make minor corrections.

You can then print the entire resulting document or print individual sections as needed.

PRINT DOCUMENTS

Using Print Documents sends the result of the merge directly to the printer. The drawbacks of merging directly to a printer are that you can't make adjustments to individual items and it's more difficult to reprint specific pages.

SEND E-MAIL MESSAGES

This feature does NOT work in our network configuration.

LABELS MERGE

When merging to labels, you'll need to select the brand and product number of the labels. This will create a table within your document that matches the layout of the labels.

Enter the contents for the labels in the *first* label. Once you have the information set up, click Update Labels from the Write & Insert Fields section. This will populate the rest of the labels with the information you added in the first label.

LABELS TIPS

You can use labels designed for inkjet printers in a laser printer. However, labels designed for a laser printer might NOT work with an inkjet printer. This is due to the fact that laser printers can typically print closer to the edges of a page than inkjet printers. Using laser labels with an inkjet printer often results in the last row of labels not printing correctly.

NEVER feed a sheet of labels through a printer more than once! This is especially true for laser printers. When labels are fed through a laser printer, heat is applied to the labels (to fuse the toner to the labels) which can weaken the adhesive. In addition, the sheet will curl slightly. Feeding a sheet of labels through a printer more than once can cause the labels to peel off INSIDE the printer and cause damage to the printer.

DIRECTORY MERGE

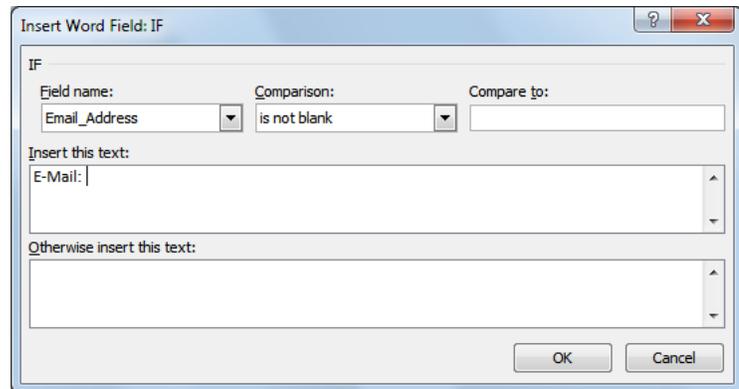
While a Directory merge isn't used as often as other types of merges, it can be extremely useful. You can use a Directory merge to create different outputs of your data source.

When using a Directory merge, there are a few techniques you may wish to use.

IF... THEN... ELSE

Let's say that you're creating a member directory. You have names and addresses for everyone. Some people, but not all, have e-mail addresses. You want to include the e-mail addresses (and a text label) but if the member does NOT have an e-mail address, you don't want anything to print.

To avoid having **E-Mail:** print out when the member does NOT have an e-mail address, you would add the label text using an *If...Then...Else* field.



The screenshot shows a dialog box titled "Insert Word Field: IF". It has three main sections: "Field name:" with a dropdown menu showing "Email_Address"; "Comparison:" with a dropdown menu showing "is not blank"; and "Compare to:" with an empty text box. Below these is a section labeled "Insert this text:" with a text area containing "E-Mail: |". Underneath that is another section labeled "Otherwise insert this text:" with an empty text area. At the bottom right, there are "OK" and "Cancel" buttons.

At the point where the text label should appear, choose If...Then...Else from the Rules drop-down (in Write & Insert Fields). For the rule, set it to E-Mail Is Not Blank. In the Insert This Text box, enter your label and any spacing that should appear after it. Keep the Otherwise box blank. Click OK.

Make sure you use Insert Merge Field to add the E-Mail field *after* the If...Then...Else field.

TABLE LAYOUT

Another common technique for a Directory merge is to output the results in a table.

You add a single-row table (with as many columns as you need) and insert the merge fields into the appropriate columns.

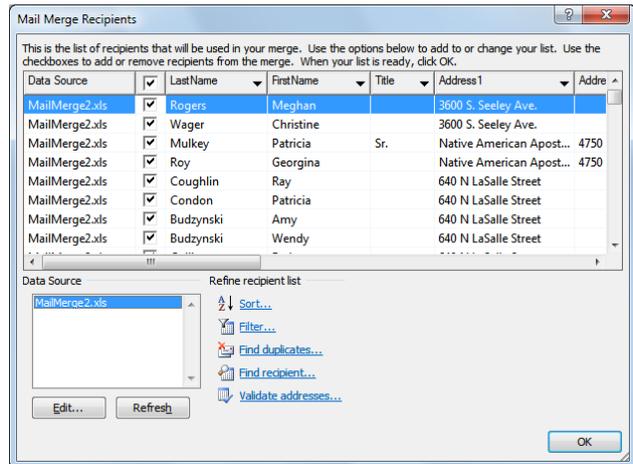
Do NOT add column headings. You would need to add column headings when you finish the merge. Otherwise, you will have a column heading before EACH row of your table.

EDIT RECIPIENT LIST

Use Edit Recipient List to modify data in your recipients list, specify the sorting for your mail merge output, and to limit the recipients for your merge (through a Filter or by selecting entries).

EDITING RECIPIENT DATA

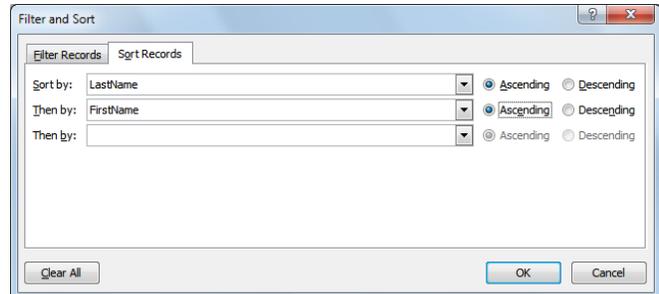
Depending on the data source used for your merge, you *may* be able to edit, delete and add records from within Microsoft Word. Click on Edit Recipient List, select the data source and click Edit. (If the Edit button is not available, then you can't edit the data within Word.)



SORTING

To specify the sort order when the merge runs, click Edit Recipient Data then choose Sorting.

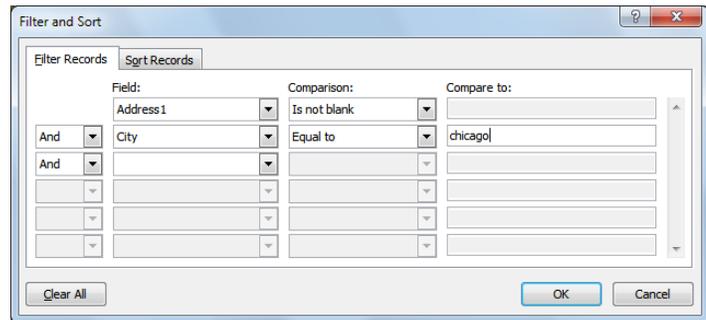
Specify the field(s) to sort on and the sort direction. Click OK when finished.



FILTERING

Filtering lets you limit which records are used in a merge.

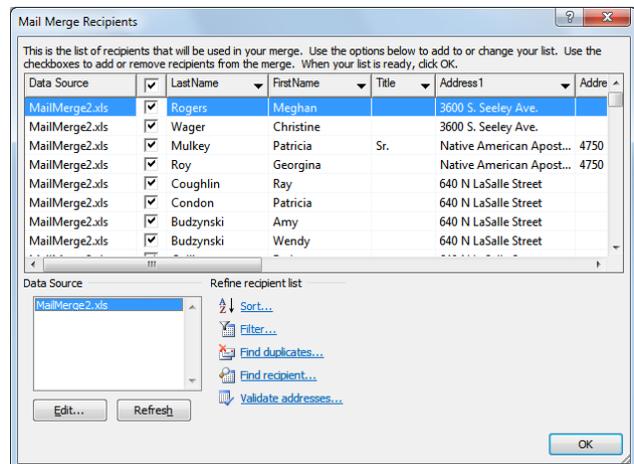
To filter, click Edit Recipient Data and choose Filter. Select the field to compare against, the comparator and value (if necessary). If you want multiple conditions, enter each condition in a separate row and choose the And/Or condition.



Note: Conditions with AND are considered a group that must be matched. For example, FirstName Equal To Mike AND LastName Equal To Riley OR LastName Equal To Smith would return the records for Mike Riley and ANYONE with a last name of Smith.

SELECTING INDIVIDUAL RECORDS

Rather than create a filter, you can select the specific records to use in a merge. Click Edit Recipient list and add/remove checkmarks as needed. Clicking the checkmark in the column heading section will select/deselect ALL records.



Direct any questions or comments to the IT Assistance Line at (312) 534-5227.