Introduction

Mail merge is a very important facility provided by word processors, especially in the world of business and commerce. A single document (often a letter) is merged with a data set (often names and addresses) to produce several documents, each of which is personalised using information from the data set. At home this often arrives in the post as *junk mail*, but it could equally be a valid letter - eg a bank statement or reminder of a hospital appointment. A secretary at the bank/hospital hasn't typed out your letter personally; instead, they have used a mail merge to combine a standard letter and your details (probably along with those of other clients) to produce one or more letters at the same time.

Mail merge can work with any dataset. The data may be held in a database, in a spreadsheet, in a table in a document or a list of email contacts. You can even use tab-separated values in a very simple text file. This is then combined with a Word document which contains *fields*. The fields match the column headings in the table or spreadsheet.

The aim of this document is to remove the mystery surrounding mail merge and to show you the facilities which Word provides to help you.

Creating a Data Set

As mentioned above, the data for a mail merge often comes from an outside source such as an Access database, Excel spreadsheet or your Outlook contacts. You will be looking at these types of data source later. As an introduction to mail merge, create your own simple dataset as follows:

1. Start up *Microsoft Word* as usual (or press **<Ctrl n>** for a new document if it's already running)

2. Type in the following field headings, pressing **<,>** (or **<Tab>**) between each entry:

   `Title, First Name, Family Name, Department`

3. Press **<Enter>** for a new line then type in a row of data (eg your own details) pressing **<,>** between each field (ie `Mr, John, Smith, French`)

4. Repeat step **3** with the details of one of your friends/colleagues

5. Continue adding data for other people if you like (though 2 records is enough to demonstrate a mail merge) - *don't* press **<Enter>** at the end of your last line of data

6. Press **<Ctrl s>** for **[Save]** and call your file `data` (press **<Enter>** for **[Save]**)

7. Now press **<Ctrl F4>** (or move to the **FILE** tab) to **Close** your document (but leave Word running)

Creating the Merge Document

You next need to create the merge document - here, a memo to be sent out to all those in your data file. In order to be able to enter field codes representing the data, you first have to associate the two documents together. You can, of course, write the bulk of the text without the codes (or use an existing document) and then add the codes later. Let's do that here:

1. Press **<Ctrl n>** to create a new blank document

2. Type `Memo to:` then press **<Tab>** followed by **<Enter>**

3. Type `Department:` then press **<Tab>** followed by **<Enter>**

4. Click on the *list arrow* attached to the **[Borders]** button (in the *Paragraph* group) and select **Horizontal Line**

5. Press **<Ctrl r>** (for **[Align Right]**) then move to the **Insert** tab and click **[Date & Time]** in the *Text* group – turn on the *Update automatically* option if you always want today's date

6. Select your preferred format from the *Available formats:* list then press **<Enter>** for **[OK]**

7. Press **<Enter>** for a new line, press **<Ctrl l>** (for **[Align Left]**) then press **<Enter>** again

Now type in the following memo (or something similar):

8. Type `The next meeting of the Committee is on Friday at 2:00pm.`

9. Press **<Enter>** then sign off with your name

Your document is now ready for data field codes to be added and for the merge to be carried out.

The Mailings Tab

There are two ways to carry out the mail merge - you can take command of the process yourself using the buttons on the *Mailings* tab on the *Ribbon* or you can seek the help of a *Wizard*.

Try using the buttons first (working across the *Ribbon* from left to right).

1. Move to the **MAILINGS** tab then click on the **[Start Mail Merge]** button and choose which type of mail merge you want – here, choose **Letters**

2. Click on the **[Select Recipients]** button and choose **Use Existing List …**

3. Click on the **Documents** button on the left side of the *Select Data Source* window

4. Select the file **data.docx** then press **<Enter>** for **[Open]**

Nothing appears to have happened but your data file is now associated with the current document.

   Press **<Ctrl Home>** then **<End>** to move the typing position after *Memo to:*

5. Click on the words of the **[Insert Merge Field]** button in the *Write & Insert Fields* group and select **Title**

6. Repeat step **6**, choosing **First Name** then **Family Name**

7. Press **<Esc>** to **[Close]** the *Insert Merge Field* window then type in spaces between the fields

8. Press **<down arrow>** to move down to *Department:* then repeat step **6**, this time choosing **Department**

9. Move the typing position down to the start of the first (blank) line of the memo (before *The...*)

10. Repeat step **6** again for the **First Name** then press **<Esc>** and type a   **,**

11. Your document is now ready for the merge - click on the **[Preview Results]** button

Your data fields are now replaced by real data. To the right of **[Preview Results]** is the **[GoTo Record]** button (currently displaying record number **1**). To the left and right of this are buttons for **[Previous Record]** and **[Next Record]** (and **[First Record]** plus **[Last Record]**).

12. Use the **[Next Record]** and **[Previous Record]** buttons to view the other memos
Once you have checked the merged memos are correct you have a choice of either sending them directly to the printer or storing them in a new document.

13. Click on **[Finish & Merge]** then choose **Edit Individual Documents…** - the following window appears:

You can now decide whether you want to have all the memos (records) or just some of them. You get the same dialog box if you choose **Print Documents…**.

14. Accept the *All* option - press **<Enter>** for **[OK]**

A new document called *Letters1* appears, with each memo on its own page (a *Section Break (New Page)* separates them). You can edit the individual memos if you need to - try adding a *postscript* to one.

16. Press **<Ctrl F4>** to **[Close]** the document, saving it as `invites`

17. End by clicking on the **[Preview Results]** button to turn this off and return to the data field codes in your merge document

Modifying the List of Recipients

If you don't want all the records in your data file used in the merge (or, indeed, if you want to add further people), you can select the records you do want via the **[Edit Recipients**
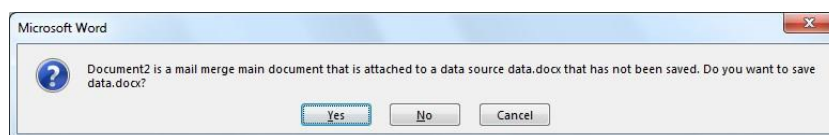
List] button: **1.** Click on **[Edit Recipients List]** - the third button in the *Start Mail Merge* group

The following window appears:

To change any of the data or add a new recipient (or delete an existing one):
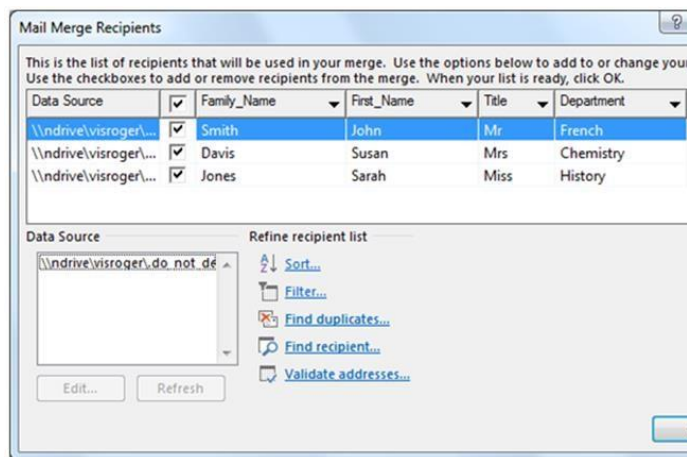
2. Click on the data file in the lower *Data Source* box then on the **[Edit...]** button - a *Data Form* appears

3. Click on **[Add New]**, type in the data for the new recipient then click on **[Close]**

4. Remove the tick from the check box in the top row (you don't need to send yourself a memo - this is how to remove individual recipients from the mail merge)

5. Click on **[OK]** then on **[Preview Results]** - note that record 1 is missing but that an extra memo has been added for the new recipient

6. Click on **[Preview Results]** again (there's no need to **[Finish & Merge]**)

7. End by closing the file – press **<Ctrl F4>** (or move to the **File** tab and choose **Close**)

8. When asked, save the changes you've just made to your data file (press **<Enter>** for **[Yes]**) and save the merge document as **memo**

If you open up your data file, you will find that the extra record has been added and that your own record is still intact - turning off the check box doesn't delete the record from the file (you would have had to use the **[Delete]** button on the *Data Form* to do that). To see this:

9. Move to the **FILE** tab, choose **Open** then select **data.docx** from the list of *Recent Documents*

Note how *double quotes* have been placed around the data for the extra recipient. In this simple comma separated file, these cause no problem. If, however, the text is converted to a proper table then they do appear in the merge:

10. Press **<Ctrl a>** to select all the data

11. Move to the **INSERT** tab, click on the **[Table]** button and choose **Convert Text to Table...**

12. Press **<Enter>** for **[OK]** and the text becomes a proper table

When performing a mail merge, people often create tables like this in which to store their data. As you have already seen, you don't have to do this - but it can simplify data entry. To check that the mail merge still works:

13. Press **<Ctrl s>** to save your new layout

14. Move to the **FILE** tab, choose **Open** then select **memo.docx** from the list of *Recent Documents*

15. Click on **[Yes]** when a warning message (about an SQL command) appears – this is normal

16. Move to the last record and note that the *double quotes* now appear

17. Move to the *data* file via the *Task Bar* then press **<Ctrl h>** for **[Replace]** and set *Find what:* to " – click on **[Replace All]** then press **<Enter>** twice (for **[Yes]** and **[OK]**) followed by **<Esc>** for **[Close]**

18. Press **<Ctrl F4> t**o close the data file – press **<Enter>** to **[Save]** the changes

The Address Block and Greeting Line

Word provides two special codes (*Address Blocks* and *Greeting Lines*) to allow you to insert multiple data fields (rather than having to add each individually, as you did above):

1. Move to the **MAILINGS** tab and click on **[Preview Results]** to turn this off and return to the codes

2. Remove some of the current codes - drag through the three codes after *Memo to:* and **<Delete>** them

3. Next click on the **[Address Block]** button in the *Write & Insert Fields* group
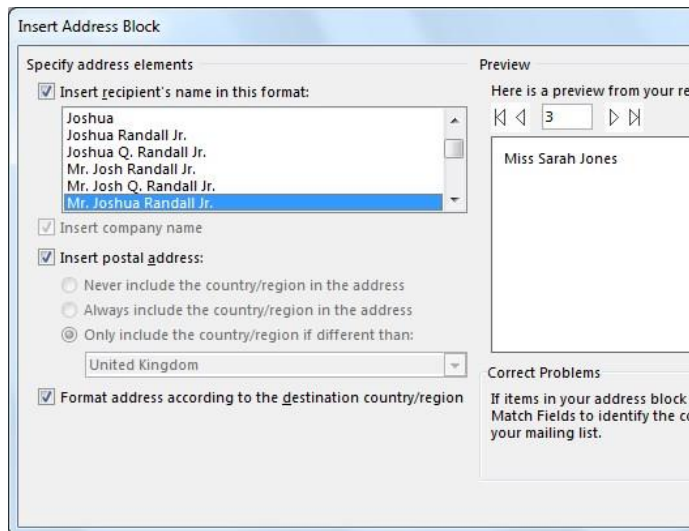
In the box on the left, you can choose various formats for the recipient's name – here, *Mr. Joshua Randall Jr.* is fine. Only the name appears in the *Preview* area even though *Insert postal address* is clicked on. Depending on what you've used for your column headings, even the name might not appear. To rectify this:

4. Click on **[Match Fields...]** – the following dialog box appears:
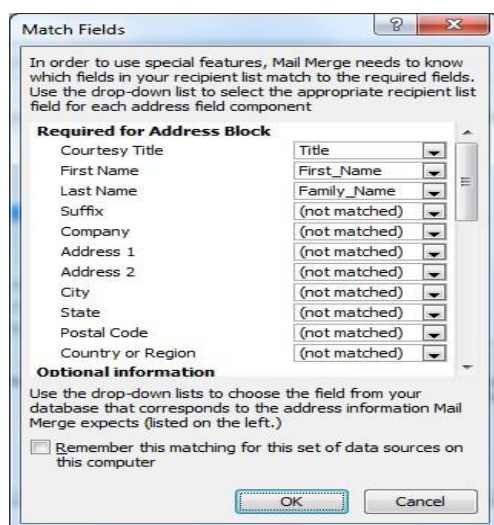
You'll see that *Family Name* has been matched correctly to *Last Name* and that the two fields above have also been matched too. The other fields are not matched, however, but it's easy to do so:

5. Click on the arrow to the right of *Company* and choose **Department**

Note the option to *Remember this matching for this set of data sources on this computer*. If you turn this on then you wouldn't need to *Match Fields* if you were to use the same data file with another merge document.

6. Press **<Enter>** for **[OK]** to close the *Match Fields* dialog box

The *Preview* now shows the department from your records (which you don't want).

7. Turn off the *Insert company name:* option then press **<Enter>** for **[OK]** - the block is added to your memo

Each *Address Block* can be customized and you can use this method to insert different fields at various locations in your document. Try adding another block for the *Department*:

8. Remove the current code by dragging through *<<Department>>* and pressing **<Delete>**

9. Click on the **[Address Block]** button and, this time, turn off both the *Insert recipient's name …* and *Insert postal address* options

10. Press **<Enter>** for **[OK]** to insert the new block

11. Click on **[Preview Results]** to see the result then *again* to return to the codes

In this particular example, it would have been easier to use the *Department* field directly, but it does show you what can be done. Also, you didn't have to turn off the *Insert postal address* option because the fields don't exist here.

Next, add a *Greeting Line*:

12. Move down to the start of the memo and **<Delete>** the first line (*<<FirstName>>,*)

13. Click on the **[Greeting Line]** button in the *Write & Insert Fields* group – a dialog box appears as below:

14. Using the *list arrow*, change *Dear* to **To:**

15. Also, change *Mr. Randall* to **Joshua** then press **<Enter>** for **[OK]**

16. Click on **[Preview Results]** to see the result (use **[Next Record]** to move through the records) then **[Preview Results]** *again* to return to viewing the codes

You've finished seeing how the buttons on the *MAILINGS* tab work, so:

17. Press **<Ctrl F4>** (or move to the **File** tab) and **Close** the memo file, saving the changes when asked

The Mail Merge Wizard

The *Mail Merge Wizard* takes you through the above process one step at a time; there are 6 steps in all. Once you are used to it, it makes mail merge even simpler. If you ever need to take control yourself then simply redisplay the toolbar and make the necessary changes using the buttons.
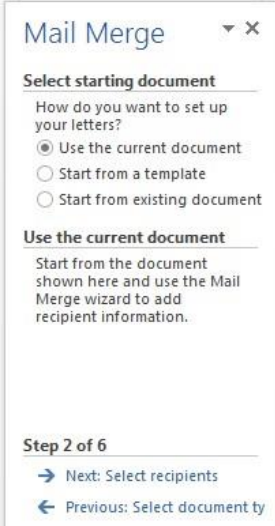
1. Press **<Ctrl n>** for a new document (a document must be open for the *Wizard* to work)

2. Move to the **MAILINGS** tab, click on **[Start Mail Merge]** and choose **Step by Step Mail Merge Wizard...**

The *Task Pane* appears on the right of the screen. This changes with each step, as shown below:

1)

Mail Merge   ▾ ✕

Select document type

What type of document are you working on?

- ⦿ Letters
- ○ E-mail messages
- ○ Envelopes
- ○ Labels
- ○ Directory

Letters

Send letters to a group of people. You can personalize the letter that each person receives.

Click Next to continue.

Step 1 of 6

→ Next: Starting document

2)

Mail Merge   ▾ ✕

Select starting document

How do you want to set up your letters?

- ⦿ Use the current document
- ○ Start from a template
- ○ Start from existing document

Use the current document

Start from the document shown here and use the Mail Merge wizard to add recipient information.

Step 2 of 6

→ Next: Select recipients
← Previous: Select document ty

3)

Mail Merge   ▾ ✕

Select recipients

- ⦿ Use an existing list
- ○ Select from Outlook contacts
- ○ Type a new list

Use an existing list

Currently, your recipients are selected from:

[Office Address List] in "newdata.

▦ Select a different list...

✎ Edit recipient list...

Step 3 of 6

→ Next: Write your letter
← Previous: Starting document

4)

Mail Merge   ▾ ✕

Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- 📄 Address block...
- 📄 Greeting line...
-     Greeting wizard...
- ⬆ Electronic postage...
- ▌▌▌ Barcode...
- ⌊⌋▐▌ Postal barcode (Japan)...
- ▦ More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

Step 4 of 6

→ Next: Preview your letters
← Previous: Select recipients

5)

Mail Merge   ▾ ✕

Preview your letters

One of the merged letters is previewed here. To preview another letter, click one of the following:

   <<   Recipient: 1   >>

🔎 Find a recipient...

Make changes

You can also change your recipient list:

✎ Edit recipient list...

Exclude this recipient

When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments.

Step 5 of 6

→ Next: Complete the merge
← Previous: Write your letter

6)

Mail Merge   ▾ ✕

Complete the merge

Mail Merge is ready to produce your letters.

To personalize your letters, click "Edit Individual Letters." This will open a new document with your merged letters. To make changes to all the letters, switch back to the original document.

Merge

🖨 Print...

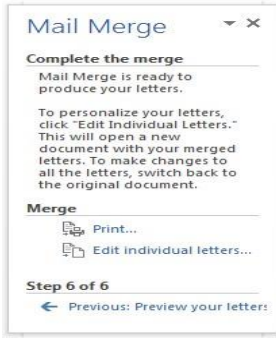📄 Edit individual letters...

Step 6 of 6

← Previous: Preview your letter

Step 1: Setting Up the Document Type

You haven't considered document type yet. Basically, mail merge can be used for different types of document including a letter/memo, a set of envelopes, an email, address labels and a list/catalogue (*directory*).

The default type of document is a letter and, to keep things simple, that's what you'll create first:

3. Leave *document type* as **Letters** - click on **Next: Starting document** at the foot of the pane

Step 2: Select the Starting Document

In step 2 you can choose which document you want for your merge document. This can be an existing document (or template) or the current document.

4. Leave *starting document* as **Use the current document** - click on **Next: Select recipients**
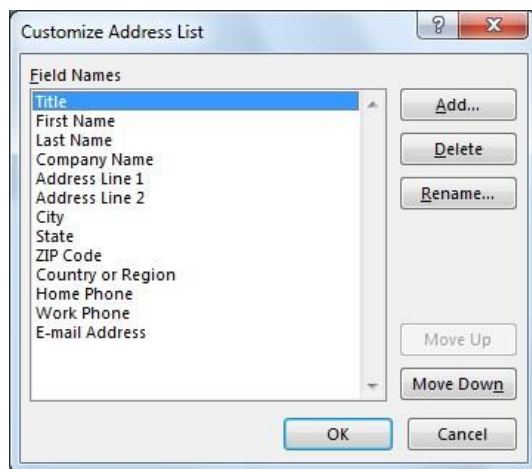
Step 3: Select Recipients

In step 3 you need to identify the data file containing the recipients. If no such file currently exists then you can create one - try this next:

5. Under *Select recipients* click on **Type a new list** then **Create...** - a data form appears:

This provides a list of the most likely fields you will be using - but it's set up for writing a letter and uses American field names. That's no real problem as you can customize the list to rename fields, delete ones you don't want and add new ones you do require:

6. Click on **[Customize Columns...]** - another dialog box appears:

7. Select *Company Name* then click on **[Rename…]**

8. In *To:* type in a new name of `Department` then press **<Enter>** for **[OK]**

9. Next, select *E-mail Address* and **[Delete]** it - press **<y>** for **[Yes]** to confirm this

10. Repeat step **8** *eight* times to leave just the first *four* fields in the list

11. Now create an extra field - click on **[Add...]**

12. Type in a new field name `Partner` then press **<Enter>** for **[OK]**

Note: Use the **[Move Up]** / **[Move Down]** buttons to alter the order of the fields on the form.

13. Press **<Enter>** for **[OK]** again to return to the form then enter some data, as you did earlier, starting with yourself - for just some of the recipients include their partner's first name

Tip: If you press **<Enter>** (or **<Tab>**) at the end of each form it takes you to the **[New Entry]** button. Press **<Enter>** again and you can enter your next set of data.

14. When you have added **3** or **4** recipients, click on **[OK]**

15. Save the address list in *My Data Sources*, calling it `newdata` (press **<Enter>** for **[Save]**) - note that this file uses an Access database format

16. The *Mail Merge Recipients* window now appears, allowing you to specify exactly which recipients you want - here, press **<Enter>** for **[OK]** to accept them all

17. Move on by clicking on **Next: Write your letter**

Step 4: Write Your Letter

You now have to write your letter. Again, try writing a memo similar to earlier:

18. Type `Memo to:` then press **<Tab>**

19. In the *Task Pane*, click on **Address block...** – turn off *Insert postal address* then press **<Enter>** for **[OK]**

20. Press **<Enter>** for a new line, type `Department:` then press **<Tab>**

21. In the *Task Pane*, click on **More items...** to see the list of merge fields

22. Select **Department**, press **<Enter>** for **[Insert]** then **<Esc>** to **[Close]** the *Insert Merge Field* dialog box

Tip: It can be very annoying, having to close this dialog box each time you insert a field. Remember that you can always use the **[Insert Merge Field]** button on the *Ribbon*. In fact you can choose between the *Ribbon* and *Task Pane Wizard* for any of the commands.

23. Press **<Enter>** for a new line then move to the **Home** tab, click on **[Borders]** and choose **Horizontal Line 24.** Next, click on **Greeting line...** in the *Task Pane*

25. Change the *format* from *Mr. Randell* to **Joshua and Cynthia** then press **<Enter>** for **[OK]**

26. Press **<Enter>** then type in a short memo: `Don't forget the meeting on Friday.`

27. Again, press **<Enter>** then sign off with your name

28. Move on by clicking on **Next: Preview your letters**

Step 5: Preview Your Letters

The fifth step of the *Wizard* allows you to preview the results of the merge.

29. Use the *Recipient* buttons in the *Task Pane* to move between the memos

30. When you reach the memo to yourself, click on **[Exclude this recipient]** - you don't need one

31. Click on **Edit recipient list...** if you want to make any further changes to the list of recipients - click on **[OK]** to return to the merge

32. Click on **Next: Complete the merge** to move on

Step 6: Complete the Merge

The final step of the merge allows you to send the letters to the printer (**Print...**) or edit individual letters (as you saw earlier).

33. Click on **Edit individual letters...** in the *Task Pane*

34. Accept the default option *All* - press **<Enter>** for **[OK]**

The merged memos appear in a separate file, *Letters2*, as they did earlier.

35. Press **<Ctrl F4>** or click on the **[Close]** button – here, there's no need to save the file

Changing the Data Source to an Access File

At any time you can move backwards through the *Wizard* to change any of the settings. Here, try changing the data source to use a database:

1. Click on **Previous: Preview your letters** then **Previous: Write your letter** and finally **Previous: Select recipients**

2. At *Step 3*, under the heading *Use an existing list*, click on **Select a different list...**

3. Click on **My Computer** then choose **Data (D:),**
    open the folder **Training** and select
    example2013.accdb – press **<Enter>** for **[Open]**

You now have a list of 390 imaginary students for
the mail merge. The next section shows you how to
select a subset of records from the list.
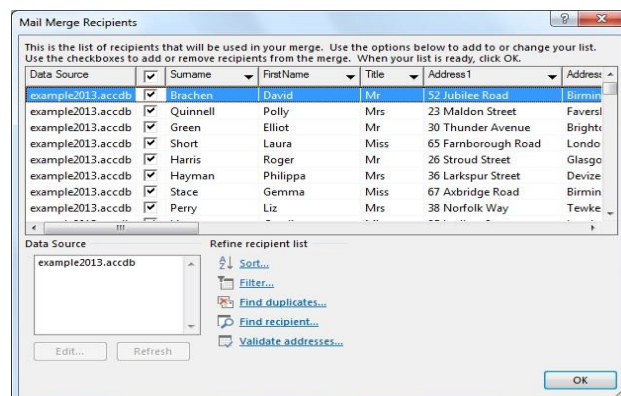
Sorting and Filtering

How can you select a subset of recipients from the list? For example, you might want to send a memo just to male
students living in a certain Hall of Residence. Currently, the list is unsorted so you would have to work through the
entire list to find the recipients you require. However, if the list were sorted by Hall of Residence, then all the
records you would need would be next to each other. It's easy to sort the list - you just click on the column
heading of the data to be sorted.

1. Using the horizontal scroll bar, move the display to the right to see the *Hall* field

2. Click on the **Hall** column heading then use the vertical scroll bar to check the results are sorted **Note:** If you

    click a second time, the records are sorted in reverse alphabetical order.

Removing the ticks on the left for those records you don't want can be very time-consuming. Sometimes it's
easier to remove all the ticks and then turn back on those records you want. To clear the ticks:

3. Click on the tick used for the column heading (between *Data Source* and *Surname*) – the ticks disappear **4.**

    Repeat step **3** to turn them all back on

A better way to select just certain records is to use a filter:

5. Click on the *filter arrow* on the left of the *Title* column heading and select **Mr** - only males are now shown

6. Repeat step **5** but this time click on the *Hall* column's *filter arrow*

7. Choose **(Advanced...)** - the *Filter and Sort*

    window appears (with the first filter already set)

    8. On the *Filter Records* tab, click on the *list*

    arrow for the second row *Field:* heading
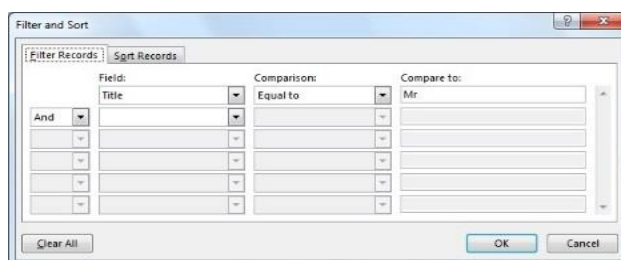
9. Select **Hall** from the list of available fields

10. Under the *Compare to:* heading type in the required hall (eg `Wantage`)

11. Click on the *list arrow* for the *Comparison:* heading - note what's provided but leave the setting as **Equal to**

Note that you can set alternative filters using *Or*. If you wanted the male students from *two* halls you would need
to set two further filters, one saying *Or Title Equal to Mr* and a fourth saying *And Hall Equal to Windsor*.

Next have a look at the sort options:

12. Click on the *Sort Records* tab:
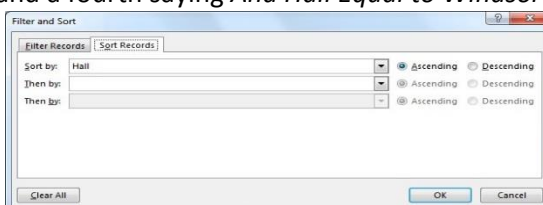
13. Click on the *list arrow* against *Sort by:* and change *Hall* to **Surname**

14. Repeat step **13** for *Then by:* and choose **FirstName** - here you can perform sorts within sorts

15. Press **<Enter>** for **[OK]** to close the *Filter and Sort* window

The *Mail Merge Recipients* list has now been shortened to include just males in the chosen hall.

16. Click on **[OK]** then on **[Preview Results]** - an error message appears:
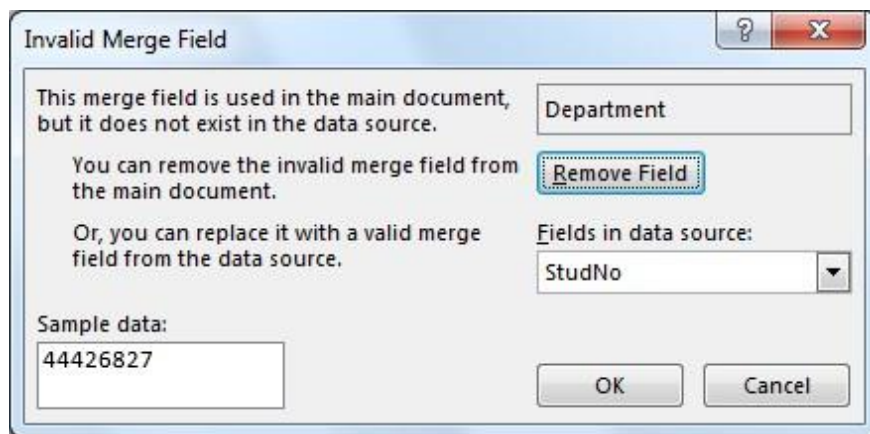
This is because there is no *Department* field in the new data source. You could replace it with another field (using the *list arrow* attached to the box provided) or remove it from the merge.

17. Click on the **[Remove Field]** button to erase the field from the main document

18. Use the **[Next Record]** and **[Previous Record]** buttons to view the memos

Using an Excel File as a Data Source

Currently, you are using an Access database for your data source but you can equally use an Excel spreadsheet. It so happens that the database had just a single table, so Word could identify the data source without asking. If the database has several tables/queries then you have to specify which one you want.

The Excel file you are going to use has more than one worksheet, so you'll be able to see the extra step in this next example.

1. Using the link provided in the *Task Pane*, click on **Select a different list...**

2. Click on **My Computer** then on **Data (D:)** and *double click* on the **Training** folder to **[Open]** it 3.

   Select the file **advanced.xls** and press **<Enter>** for **[Open]** - the following screen appears:
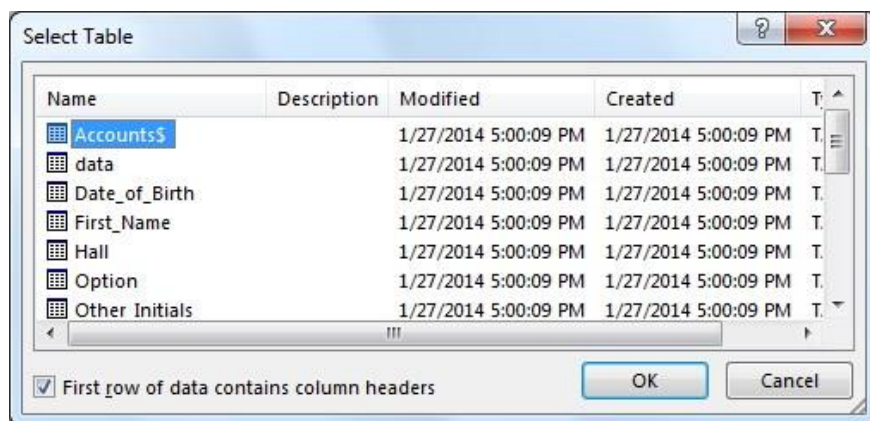
A similar window appears if your Access file contains more than one table or query. You now have to choose the source of the data. Not only is each worksheet in the file listed (these are denoted by **$** signs), but each column heading too.

4. Select the worksheet **students$** then press **<Enter>** for **[OK]** - the list of *Mail Merge Recipients* appears (note that this is the same imaginary set of students used previously):
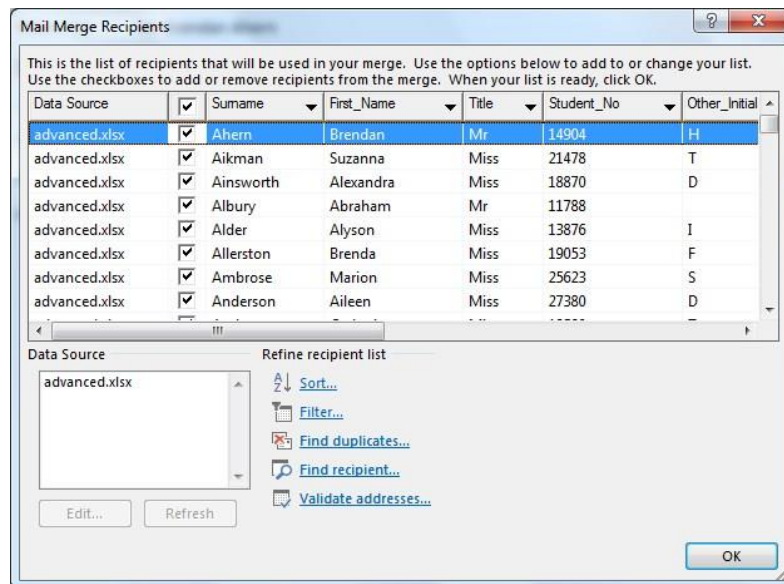
It so happens that this list is almost identical to the Access table used previously (though not all of the fields are included and it's sorted by surname). As such, the original merge should still work:

5. Click on the **[OK]** button to see the merged memos then use the **[Next Record]** button on the *Ribbon* to view some of the merged records

6. End by closing the file – press **<Ctrl F4>** or click on **Close** (there's no need to save the file)

Labels, Envelopes and Directories

The first step of the *Wizard* was to choose a document type. The default type is a *Letter*. In this next section, have a look at the other types:

1) Labels

If you want the mail merge to produce a set of labels then you proceed as follows:

1. Press **<Ctrl n>** for a new starting document

2. Move to the **MAILINGS** tab, click on **[Start Mail Merge]** and choose **Step by Step Mail Merge Wizard...**

3. At step **1** of the *Wizard*, choose **Labels** then click on **Next: Starting document 4.** Click on **Label options...** to set up your labels:
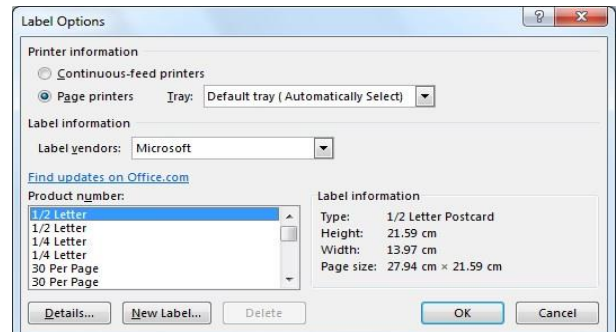
5. Change the *Label vendors:* (manufacturer) if necessary then select the correct *Product number:* (here choose **Microsoft** and **30 Per Page** – the second one, ie 2.54cm x 6.67 cm) - press **<Enter>** for **[OK]**

6. Click on **Next: Select recipients**

7. *Use an existing list* and click on **Browse...** to find it then on **My Computer**

8. Select **Data (D:)** then *double click* on **Training** and then on **example2013.accdb** to **[Open]** it

9. Click on **[OK]** to close the *Mail Merge Recipients* window

A skeleton set of labels is displayed with all but the first containing the special *<<Next Record>>* code. Codes like this are dealt with in the final section of this document.

10. Click on **Next: Arrange your labels** to move to step **4** of the *Wizard*

11. Click on **Address block...** and turn off *Insert postal address* - press **<Enter>** for **[OK]**

12. Press **<Enter>** for a new line then click on **More items...** in the *Task Pane*

13. Choose **Hall**, press **<Enter>** for **[Insert]** then **<Esc>** to close the list of fields

You now have the correct field codes on the first label but the others are all empty. Were you to view the labels, just one label per sheet would show. The *<<Next Record>>* code moves on to the next recipient but no details are included on the label. You need to replicate the codes on each label:

14. Click on the **[Update all labels]** button (or use **[Update Labels]** on the *Mailings* tab) - the field codes are copied to all the labels

15. Click on **Next: Preview your labels** to view the actual labels

16. End by closing the current document – press **<Ctrl F4>** or click on **[Close]** - there's no need to save it

Note: If the addresses don't fit onto a single label, you may need to change the paragraph spacing or font size after step **13**.

2) Envelopes

A similar process to the above could be used to print mail merge data on a set of envelopes. There's no need to go through the whole process in these notes but it is worth looking at the initial steps:

1. Press **<Ctrl n>** for a new starting document

2. Move to the **MAILINGS** tab, click on **[Start Mail Merge]** and choose **Step by Step Mail Merge Wizard...**

3. At step **1** of the *Wizard*, choose **Envelopes** then click on **Next: Starting document**

4. Click on **Envelope options...** to set up your envelopes:

The *Envelope Options* window has two tabs as shown below:
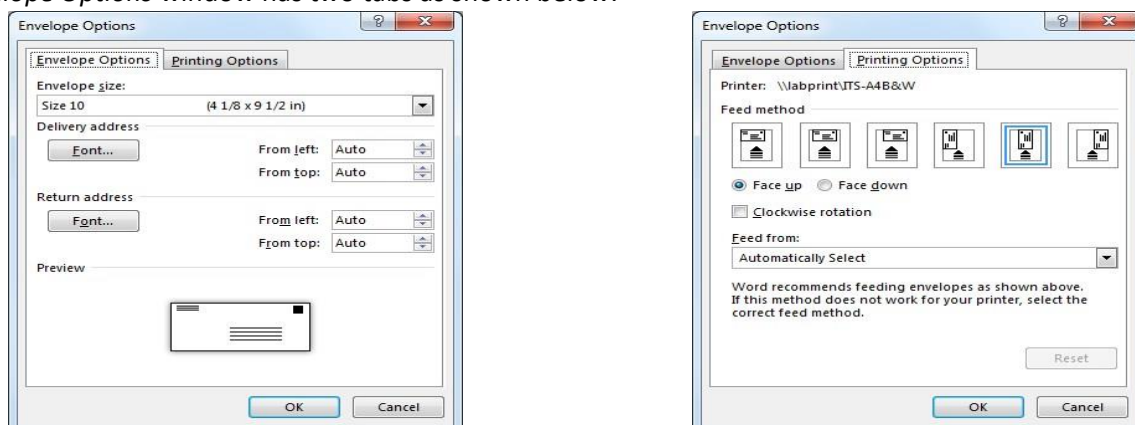
On these you need to set up the correct *Envelope size:* and the *Feed method* for your particular printer. Note also the *Preview* envelope. This has an area for the *Return address* at the top left and for the *Delivery address* in the lower middle. You can change the settings for these if you need to.

5. Select an *Envelope size:* of **DL** then press **<Enter>** for **[OK]**

6. The current typing position is ready for you to type in your *Return address* (if you want one)

7. Press the ***<down arrow>*** key *twice* to move the typing position into the text box provided for the *Delivery address* (lower centre of envelope) – or you could use the mouse to click in it

You would now link in the data file and insert an *<<Address Block>>* but there's no need to continue here.

8. End by closing the document – press **<Ctrl F4>** (or move to the **File** tab and choose **Close**) - there's no need to save it

Note: Once you have set up the *Envelope options* for one mail merge, Word remembers the settings for future merges. Similarly, *Labels options* are retained from one merge to the next.

3) Directories

You can merge data into a list such as a catalogue or list of members. Word calls such a document a *directory*. If you select this option at step *1* of the *Wizard* then you are forced into creating a new document at step *6* (you don't have the option of printing the merged records directly to the printer).

1. Press **<Ctrl n>** for a new starting document

2. Move to the **MAILINGS** tab, click on **[Start Mail Merge]** and choose **Step by Step Mail Merge Wizard...**

3. At step **1** of the *Wizard*, choose **Directory** then click on **Next: Starting document**

4. Click on **Next: Select recipients** then *Use an existing list* and click on **Browse...** to find it

5. Click on **My Computer** then on **Data (D:)**; *double click* on **Training**, select **example.accdb** and **[Open]** it

6. Click on **[OK]** to close the *Mail Merge Recipients* window

7. Click on **Next: Arrange your directory**

8. In the *Task Pane*, click on **Address block...** and turn off *Insert postal address* - press **<Enter>** for **[OK]**

9. Type a **,** then click on **More items...** in the *Task Pane*

10. Choose **Hall**, press **<Enter>** for **[Insert]** then **<Esc>** to close the list of fields

11. Press **<Enter>** for a new line

Your document is now set up for the merge. The list only shows when you get to the final step of the *Wizard* so, to speed things up, use the toolbar button to carry out the merge:

12. Click on the **[Finish & Merge]** button and choose **Edit Individual Documents…** - press **<Enter>** for **[OK]** for *All* records

You should find that you now get a list, with several records on each page.

13. Close the merged file by pressing **<Ctrl F4>** or clicking on **[Close]** - there's no need to save it

You could equally well have used a one-row table for your merge document, in which case you would now have a complete table. If you wanted your table to have column headings, you would add them to the final document, not the merge document. To see this:

14. Press **<Backspace>** to delete the blank line – the typing position should be immediately after the <<*Hall*>> code

15. Next, press **<Ctrl a>** to select the whole document

16. Now move to the **INSERT** tab and click on **[Table]** and choose **Convert Text to Table…**

17. Set the *Number of columns:* to **2** - press **<Enter>** for **[OK]**

18. Move to the **MAILINGS** tab, click on **[Finish & Merge]** and choose **Edit Individual Documents…** - press **<Enter>** for **[OK]** for *All* records

19. Now add the headings – *right click* in the top row of the table, choose **Insert** then **Insert Rows Above**

20. Type the headings `Name` and `Hall` and apply any formatting (eg **[Bold]** and **[Center]**)

21. Move to the **TABLE LAYOUT** tab and click on **Table Properties...** and click on the *Row* tab

22. Turn on *Repeat as header row at the top of each page* then press **<Enter>** for **[OK]**

23. Scroll down your new document to see the results

E-Mail Messages

Mail merge can also be used to send emails to a list of recipients (eg from your *Outlook* contacts). The email addresses could also be in an ordinary data file – here we will use the Access database again:

1. Press **<Ctrl n>** for a new starting document

2. Move to the **Mailings** tab, click on **[Start Mail Merge]** and choose **Step by Step Mail Merge Wizard...**

3. At step **1** of the *Wizard*, choose **E-mail Messages** then click on **Next: Starting document**

4. Click on **Next: Select recipients** then *Use an existing list* and click on **Browse...** to find it

5. Change *Look in:* to **Data (D:)** then *double click* on **Training**, select **example2010.accdb** and **[Open]** it

6. Click on **[OK]** to close the *Mail Merge Recipients* window

7. Type in a message then, to speed things up, click on **[Finish & Merge]** and choose **Send Email Messages**
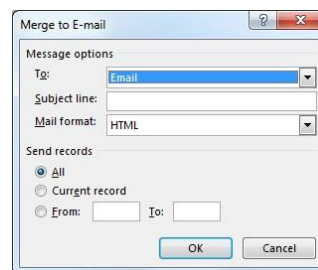
8. Set the *To:* to the **Email** field and fill in the *Subject* line

9. You would now confirm you want to send the messages but, here, click on **[cancel]**

10. End by closing the current document – press **<Ctrl F4>** or click on **[Close]** - there's no need to save it

Word Fields

Word has a small number of special field codes primarily for use with mail merge. You've already seen one (<<*Next Record*>>) but others allow you to type in additional data (ie not held in the data file) or display a particular data item only if it meets certain criteria.

You should currently be looking at your directory list. If you only want a list of students who live in a Hall of Residence then you could either set up a filter on the *Recipients List* (as you saw earlier) or you could make use of another Word code:

1. Click on **[Close]** to close it - there's no need to save the merged document

2. Next, click on **[Preview Results]** to redisplay the merge codes

3. Press **<Ctrl Home>** to move to before the <<*Address Block*>>

4. Click on the **[Rules]** button on the **Mailings** tab and choose **Skip Record If...**

5. Fill in the dialog box as below (ie change *Field name:* to **Hall** and *Compare to:* to **Private**):
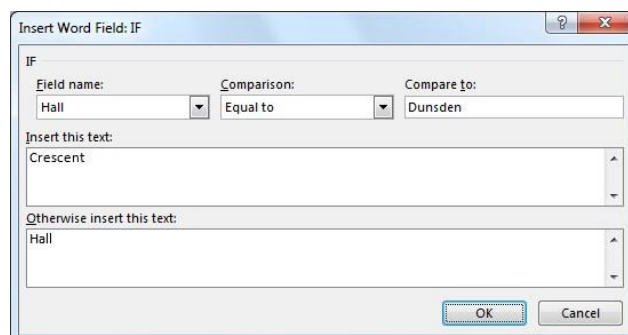
6. Press **<Enter>** for **[OK]** then on the **[Finish & Merge]** button and choose **Edit Individual Documents…**

7. Press **<Enter>** for **[OK]** to see *All* the records - no students in *Private* accommodation are now listed

8. Close the merged file by clicking on **[Close]** - there's no need to save it

The list could be improved if the word *Hall* was added to each record where applicable (you wouldn't want *Dunsden Hall*, however, as it's *Dunsden Crescent*). To achieve this you need another special Word field:

9. Move the typing position immediately after the <<*Hall*>> field code and press the **<spacebar>**

10. Now click on the **[Rules]** button and choose **If ... Then ... Else ...**

11. Fill in the new dialog box as below - change the *Field name:* to **Hall**, *Compare to:* to **Dunsden** then *Insert this text:* to **Crescent** and *Otherwise insert this text:* to **Hall**

12. Click on **[OK]** then on the **[Finish & Merge]** button and choose **Edit Individual Documents…**

13. Press **<Enter>** for **[OK]** to see *All* the records

14. Close the merged file by clicking on the **[Close]** button - there's no need to save it