

Mail Merge in Microsoft Word

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Objectives

- Show Mail Merge process in Microsoft® Word

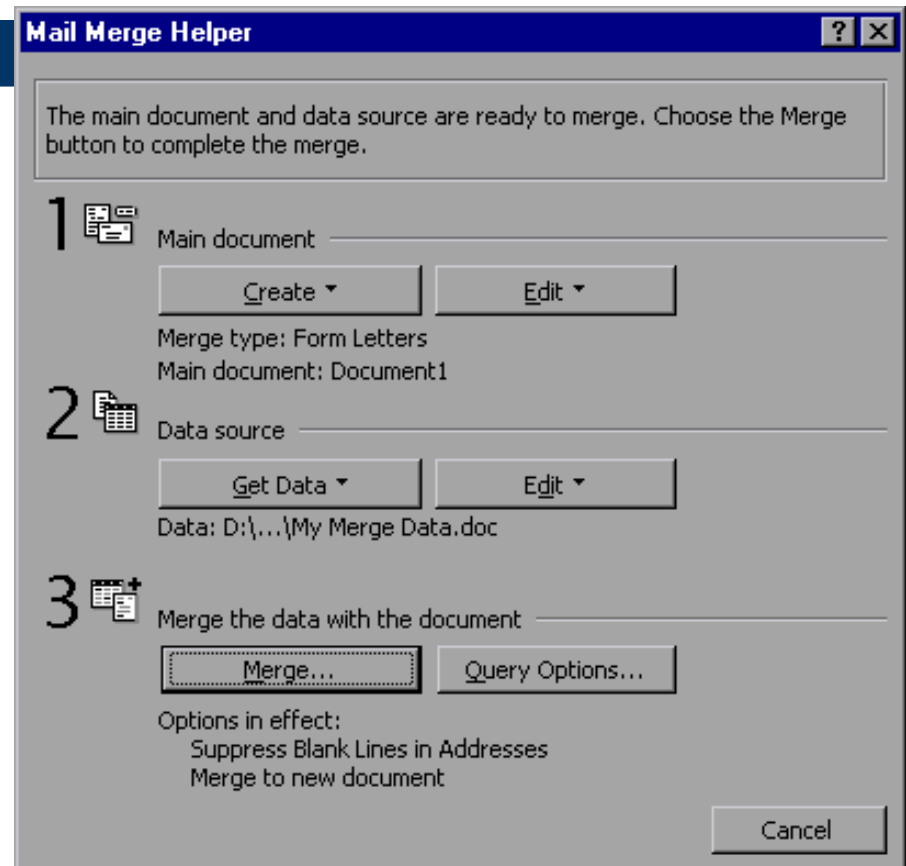
Parts of a Mail Merge

1. Data source
2. Main document
3. Results



Word 2000 Mail Merge

- The Word 2000 Mail Merge Helper
- Three main parts
 - Actual process took more than three steps



Main Improvements

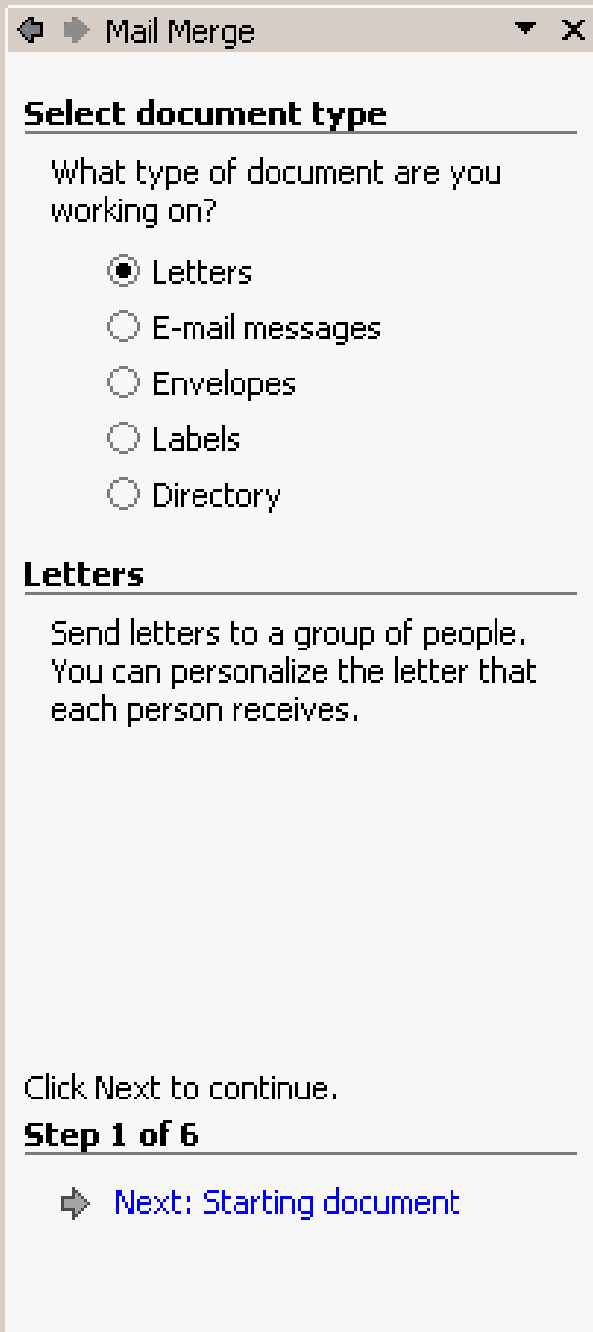
- Clearer process
- Mail Merge Wizard Task Pane
 - Visible during entire process
 - Title of the current step
 - Options available for the current step
 - Actions for the current step
 - A description of the step
 - Navigation forward and back through the wizard

Word 2002 Mail Merge Steps

1. Select document type
2. Select starting document
3. Select recipients
4. Write or arrange main document
5. Preview merge
6. Complete the merge

Step 1: Select Document Type

- Letters
- E-mail messages
- Faxes
- Envelopes
- Labels
- Directory



The screenshot shows a window titled "Mail Merge" with a close button. The main heading is "Select document type". Below it is the question "What type of document are you working on?". There are five radio button options: "Letters" (selected), "E-mail messages", "Envelopes", "Labels", and "Directory".

Letters

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

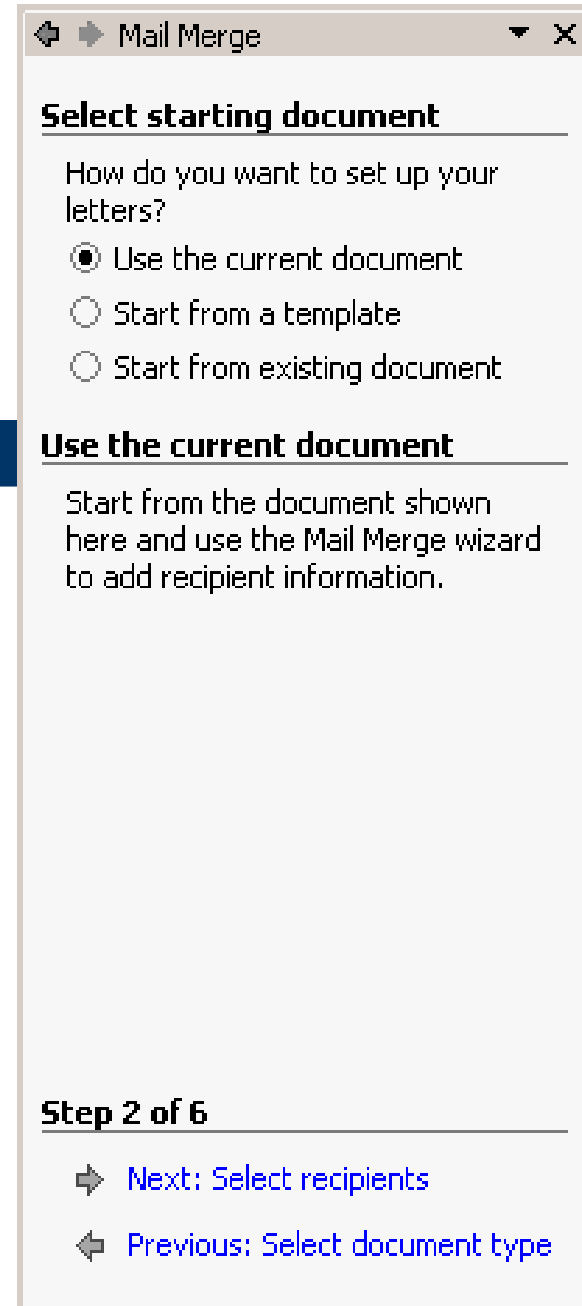
Click Next to continue.

Step 1 of 6

➔ [Next: Starting document](#)

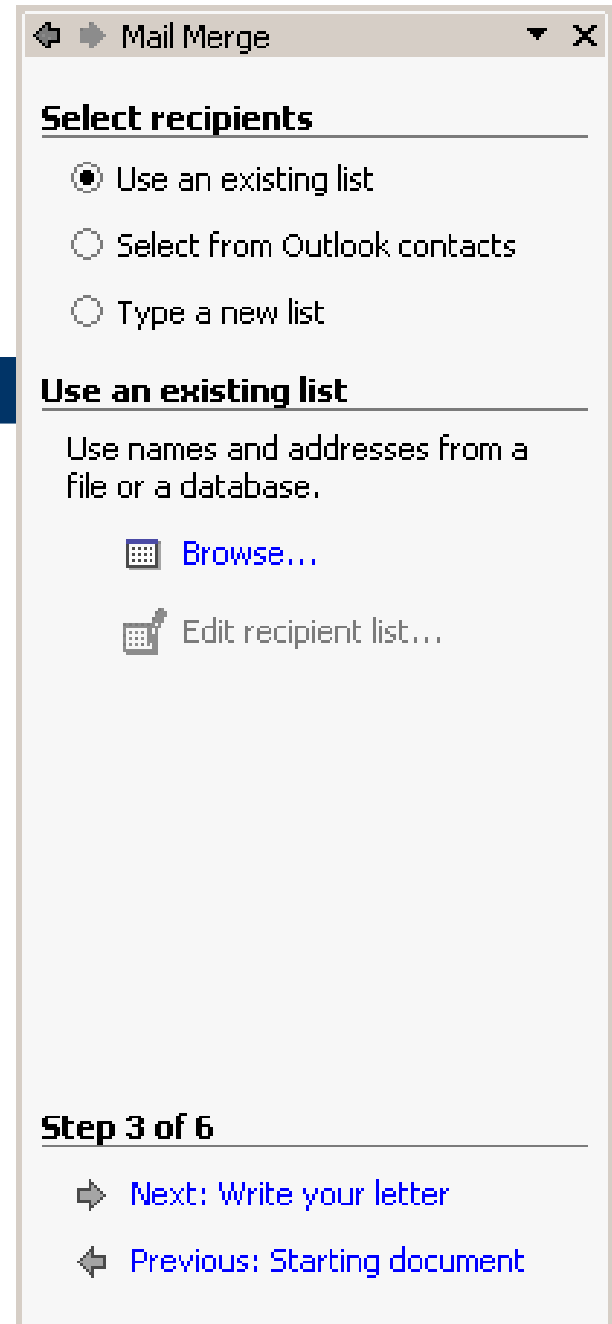
Step 2: Select Starting Document

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



Step 3: Select Recipients

- Use an existing list
- Select from Microsoft Outlook® Contacts
- Type a new list



Step 3: (con'td)

Select Recipients

- Using Outlook as a data source
 - Uses Outlook field names in the list of standard merge fields, so that mapping is automatic
 - Supports more Outlook contact fields

Step 3: (con't) Select Recipients

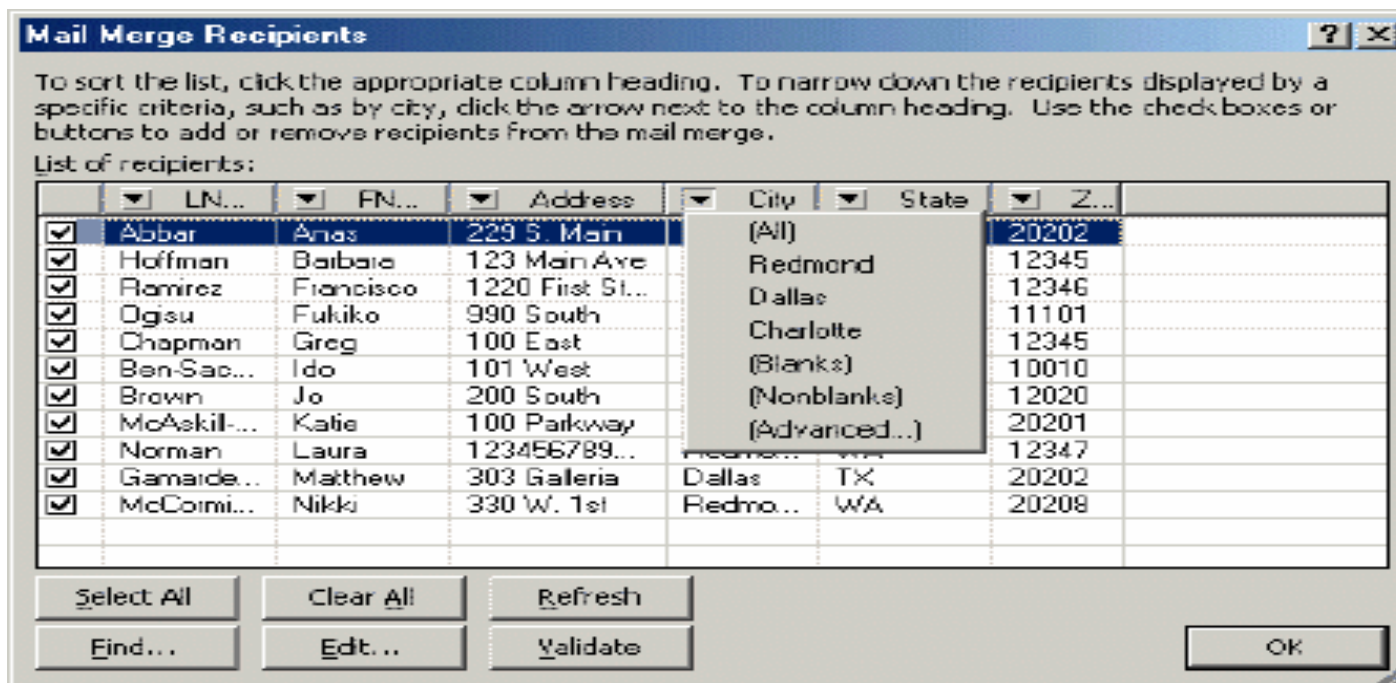
- Create a new list

The screenshot shows a dialog box titled "New Address List" with a standard Windows-style title bar (minimize, maximize, close buttons). The dialog is divided into several sections:

- Enter Address information:** A scrollable area containing text input fields for "Title", "First Name", "Last Name", "Company Name", "Address Line 1", "Address Line 2", "City", and "State".
- Action Buttons:** A row of buttons including "New Entry", "Delete Entry", "Find Entry ...", "Filter and Sort...", and "Customize...".
- View Entries:** A section for navigating through the list, featuring a "View Entry Number" field with a value of "1", and buttons for "First", "Previous", "Next", and "Last".
- Summary:** A label "Total entries in list" with a value of "1".
- Cancel:** A "Cancel" button at the bottom right.

Step 3: (con't) Select Recipients

- Microsoft Word 2002 introduces a new Mail Merge Recipients dialog box
 - Filter and/or sort the recipients list



Step 4: Write or Arrange Main Document

- Add recipient information
 - Address block
 - Greeting line
 - Electronic postage
 - Postal bar code
 - More items (lists all merge fields)



Step 4: (con't)

Write or Arrange Main Document

- Insert address block

Insert Address Block ? X

Specify address elements

Insert recipient's name in this format:

Joshua
Joshua Randall Jr.
Joshua Q. Randall Jr.
Mr. Josh Randall Jr.
Mr. Josh Q. Randall Jr.
Mr. Joshua Randall Jr.

Insert company name

Insert postal address:

Never include the country/region in the address
 Always include the country/region in the address
 Only include the country/region if different than:

Preview

Mr. Joshua Randall Jr.
Blue Sky Airlines
1 Airport Way
Kitty Hawk, NC 27700

Match Fields... OK Cancel

Step 4: (con't)

Write or Arrange Main Document

- Insert greeting line

Greeting Line [?] [X]

Greeting line format:

Dear Mr. Randall,

Greeting line for invalid recipient names:

Dear Sir or Madam,

Preview

Dear Mr. Randall,

Match Fields... OK Cancel

Step 4: (con't)

Write or Arrange Main Document

- ◆ **Match fields**
 - **Address block and greeting line both tie into Match Fields**
 - **Easier to work with data sources with different field names**
 - **Map non-standard field names to built-in field names**

Match Fields ? X

Mail Merge has special features for easily working with addresses. Please specify address field components to simplify address insertion.

Required information	
Last Name	LName
First Name	FName
Courtesy Title	(not available)
Company	(not available)
Address 1	Address
City	City
State	State
Postal Code	Zip
Spouse First Name	(not available)

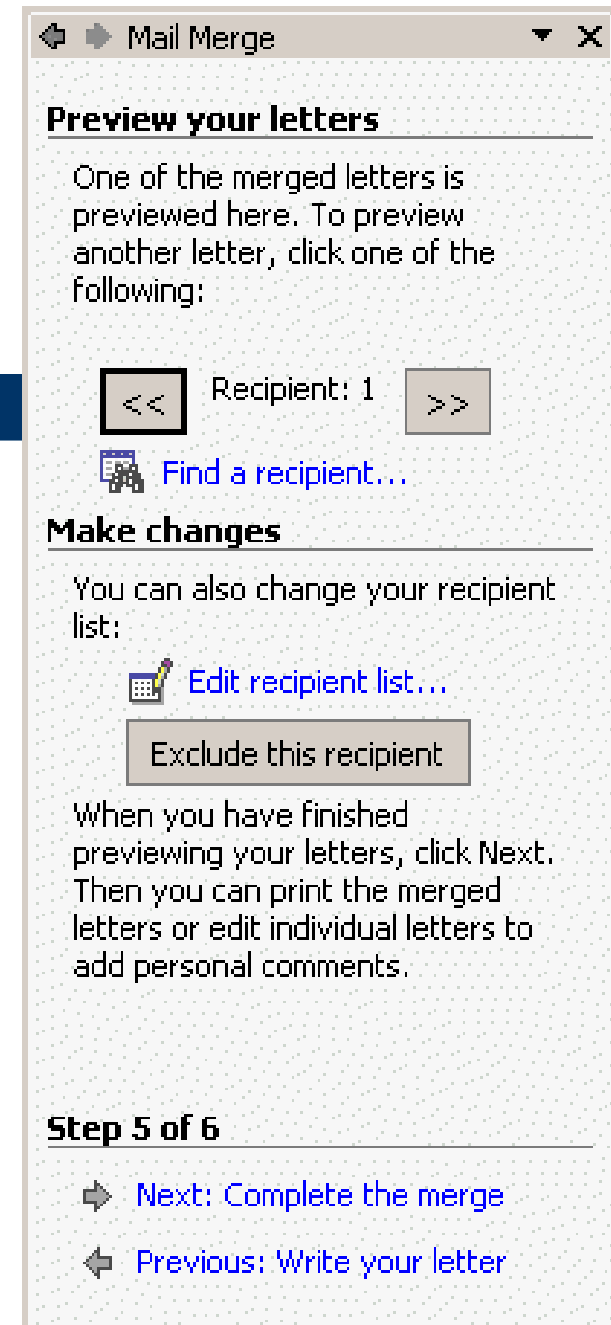
Optional information	
Middle Name	(not available)
Suffix	(not available)

Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)

OK Cancel

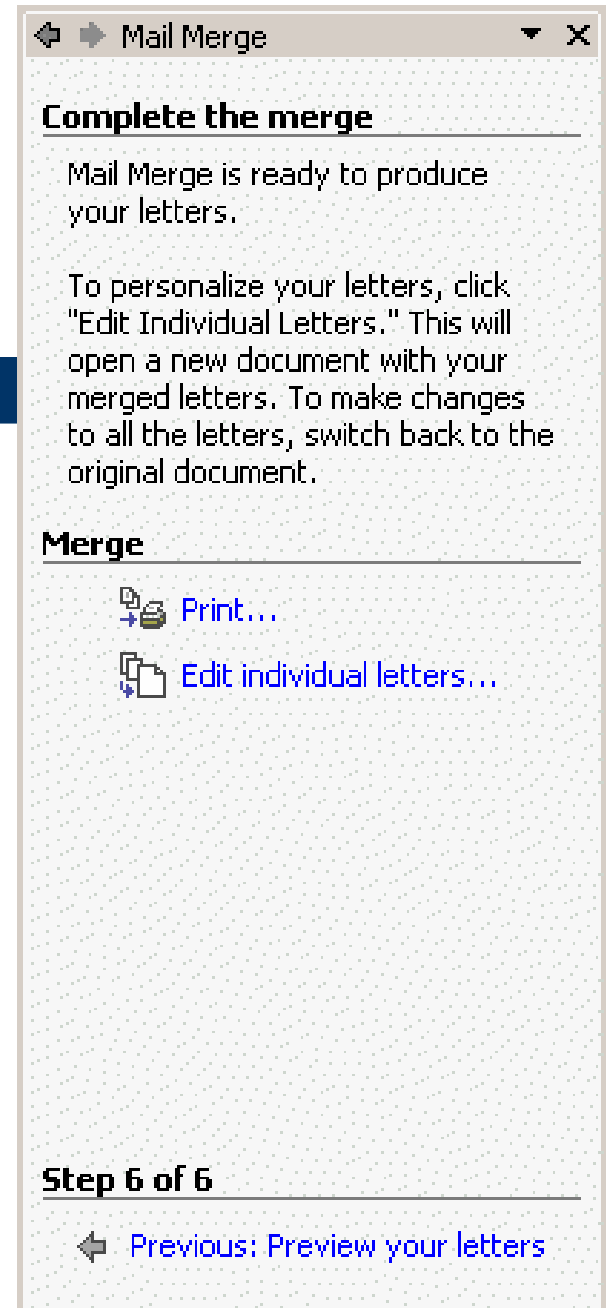
Step 5: Preview Merge

- Preview the merge results
- Make changes to the letter
- Exclude recipients



Step 6: Complete the Merge

- Print
- Edit individual letters

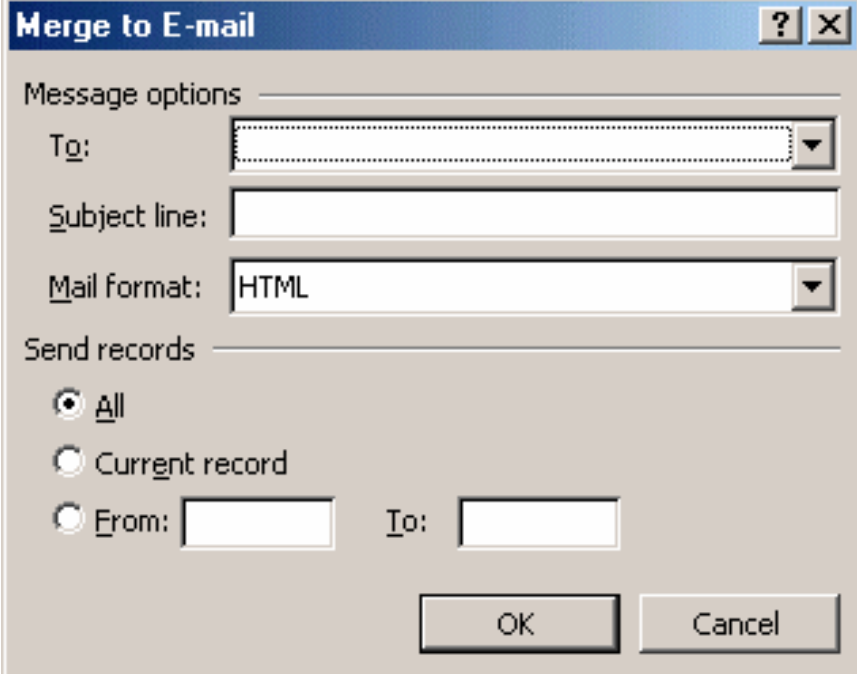


Differences in Some Steps for Other Document Types

- E-mail messages
- Envelopes
- Labels

E-Mail Messages

- Message options



The screenshot shows a dialog box titled "Merge to E-mail" with a standard Windows-style title bar (minimize, maximize, close buttons). The dialog is divided into two sections: "Message options" and "Send records".

Message options:

- To:** A dropdown menu with a dotted border and a downward arrow.
- Subject line:** A text input field.
- Mail format:** A dropdown menu with "HTML" selected and a downward arrow.

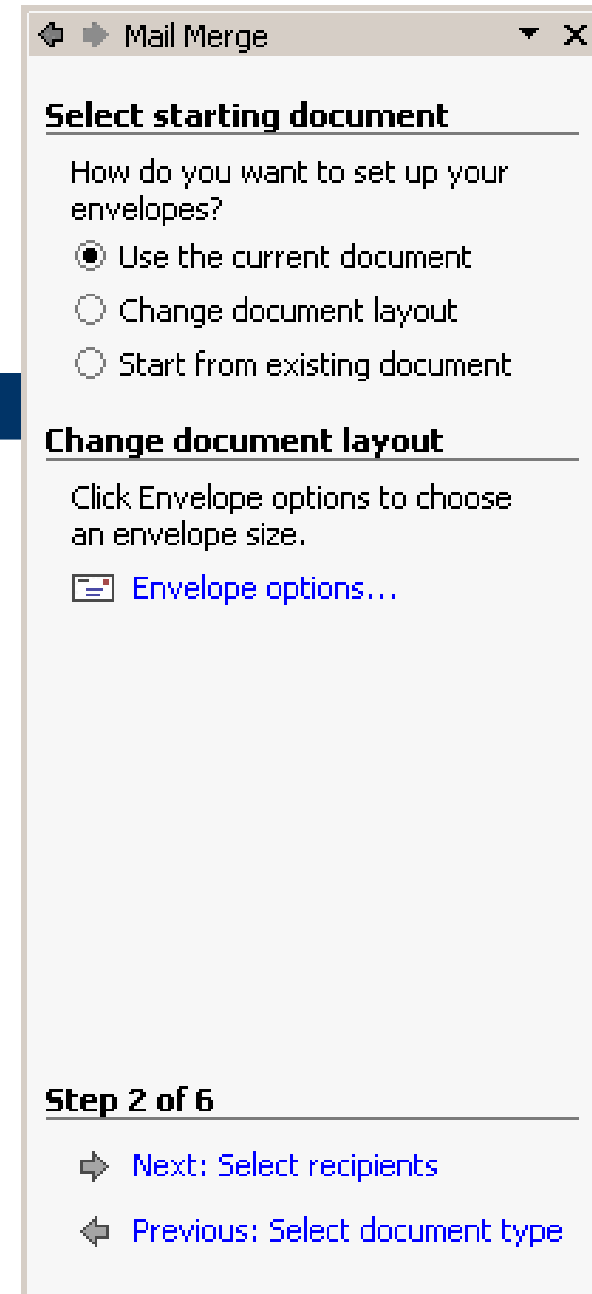
Send records:

- All
- Current record
- From: [text input] To: [text input]

At the bottom right, there are two buttons: "OK" and "Cancel".

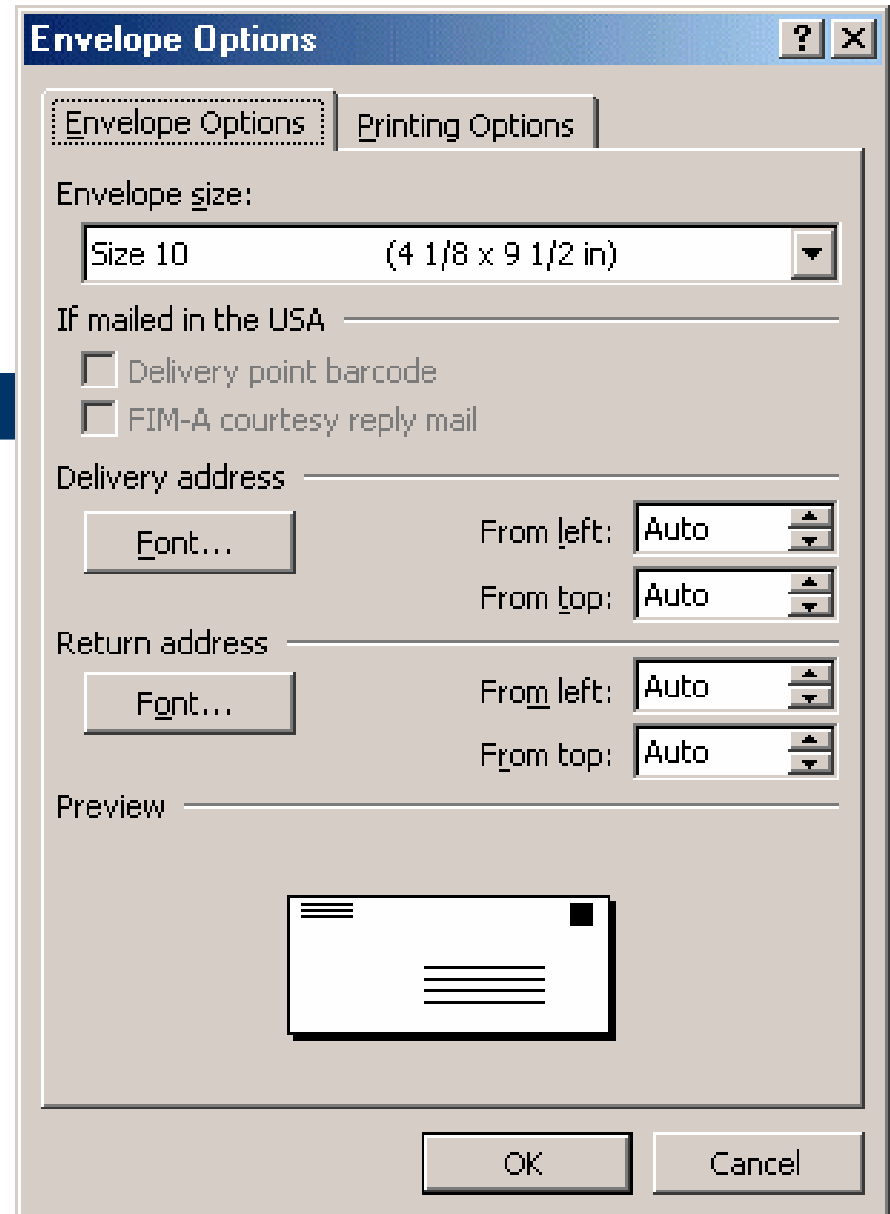
Envelopes

- Select starting document
- Change document layout



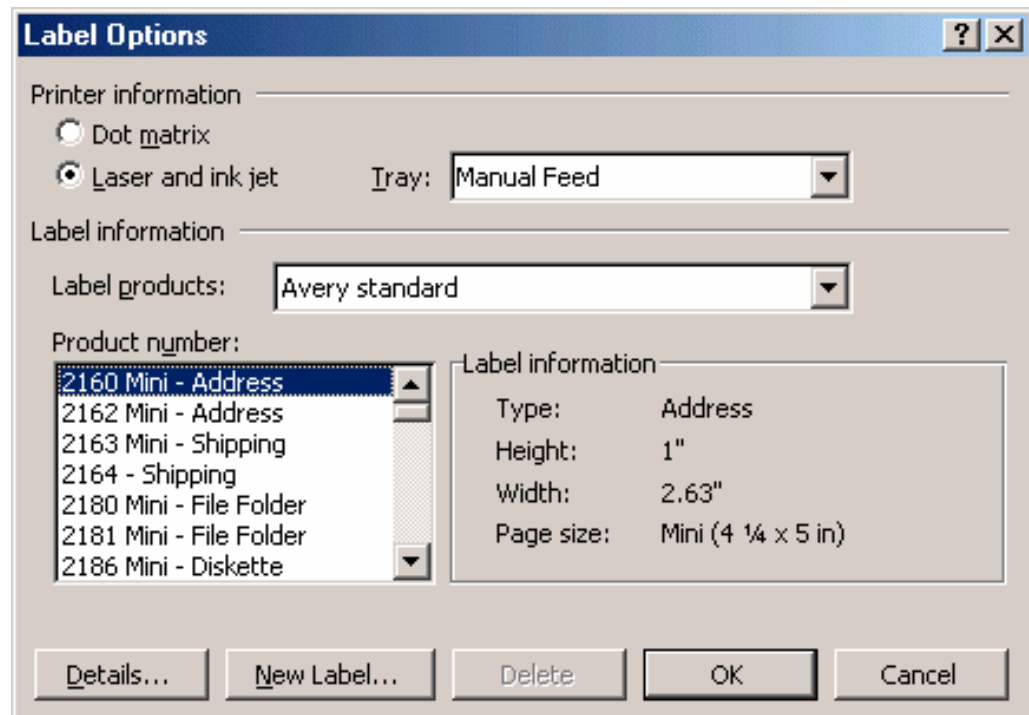
Envelopes (2)

- Envelope options
- Printing options



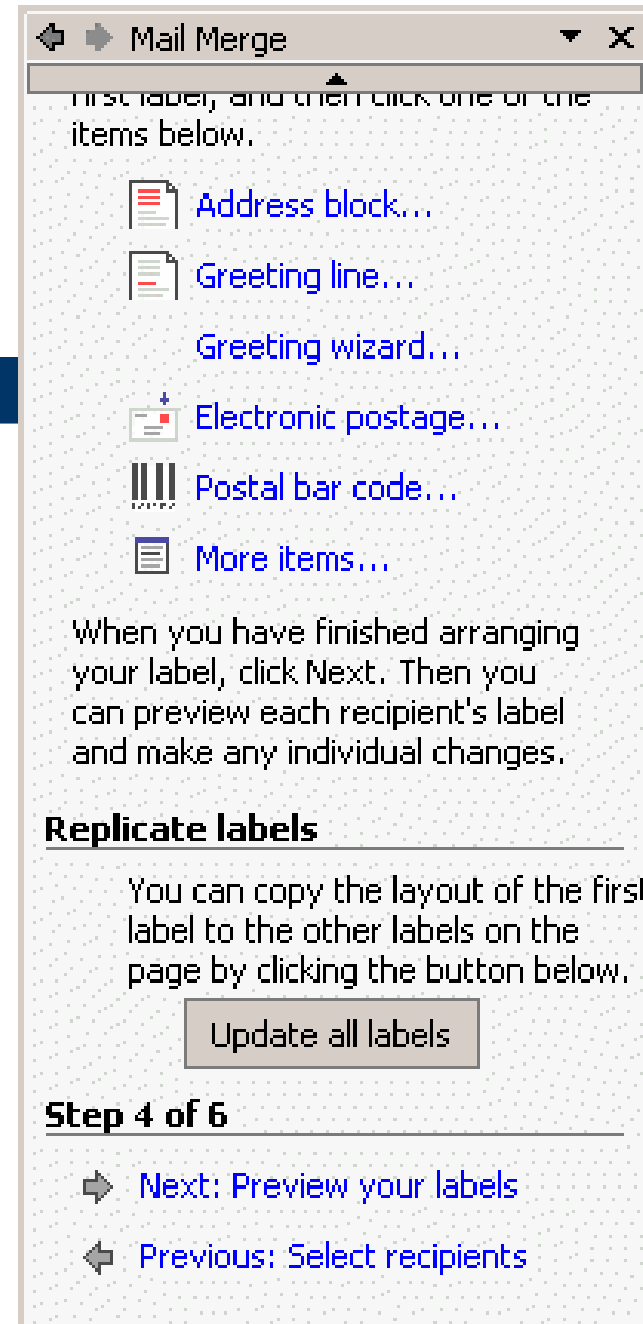
Labels

- Select starting document
- Change document layout
- Label options



Labels (2)

- Arrange Labels
- Update all labels
 - Easier to modify and update existing labels



Mail Merge Toolbar

- Intended for users very familiar with Word's Mail Merge

