

UNIT 5 MAIL MERGE

Structure

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5.0 INTRODUCTION

The Mail Merge feature and the Macros have been described in this unit. Word's Mail Merge feature is a quick and easy way for mass producing form letters, envelopes, mailing labels, phone lists etc. By using Mail Merge, you can send the same letter to a number of people, without typing the original letter more than once.

The Macro is a sequence of actions that is named and stored. When you run a macro Word performs all the assigned actions in sequence. You can assign a macro to a key, a combination of keys, a tool button, or a menu. The Macro feature basically helps in faster editing and formatting.

5.1 OBJECTIVES

After going through this unit, you will be able to

- create a data source for the document
- merge the addresses for printing on envelopes and labels

5.2 MAIL MERGE

Word's Mail Merge feature lets you quickly create personalized correspondence and other documents by combining information (merging) information from two different files.

For instance, you could merge a list of names and addresses from one file (your data document) with another file (your main document) to produce a number of personalized form letters.

You could also create catalogs, forms with variable information fields, or labels. You insert data instructions (fields) in the main document wherever you want data from the data source to appear in your merged documents.

Mail Merge feature can also be used to prepare other kinds of merged documents such as catalogs parts lists, directory lists, forms or invoices, print addresses on envelopes and mailing labels.

5.2.1 Data Sources & Main Documents

Data Sources are organized collections of information - databases-stored as Word tables. Word can also use data from other applications such as MS Excel or MS Access. After opening a data source in another application, make sure that the merge fields in your document match those in the data source. All data sources, no matter where they come from, contain records and fields. For example, an employee data source would contain one record for each employee. This record would contain multiples fields - one for the employee's first name, one for the middle initial, one for the last name, one for each part of the address and so on.

The data source contains the information that can vary in each version of a form letter, such as the names and addresses.

You can either open an existing data source or create a new one in Word.

Main documents as mentioned earlier contain the text of your project (the body of a letter), fields, and merge instructions.

Main Documents can be used from earlier versions of Word or from other Applications.

While using the Main document from other applications, open that document in Word 6 and convert its contents to Word for Windows. However, field names and formatting from some applications may not translate well into Word for Windows format. Check the fields in your main document and adjust them if necessary before completing the merge or you can paste the main document into Word for Windows as plain text, then apply the formatting and centering the field names.

5.2.2 Starting & Editing the Main Document

Creating a merge main document, such as form letter, is a three-step process.

Step 1: To set up the main document, which contains the text, punctuation, and other items that remain the same in each version of the form letter.

Step 2: To set up a data source which contains the information that varies in each version. This can be done either by opening an existing data source or creating a new one.

Step 3: To complete the main document by inserting merge fields and by typing or adding information you want to be the same in each form letter, such as the body of the letter, your address and your logs.

Step 1: To start the main document:

- i) Select the create button to start creating your main document. A list will drop down offering you four choices-Form Letters, Mailing Labels, Envelopes and Catalogs.
- ii) Select the type of main document you want. A dialog box appears offering you the choice of the active window or a new main document.
- iii) Choose the Active Window button if the active window contain information for your main document or choose the New Main Document button if the active window doesn't contain any information for the mail merge.

Whichever button you choose, Word will return to the Mail Merge Helper dialog box and the space below the create button now lists the information you've entered so far-the type of merge and the main document to use.

Step 2: Next, you need, to specify the data source and arrange in it the fields that will be available to your main document for the merge.

- i) Click the Get Data button to display a list of options for your data source.
- ii) If you already have a data source that you want to use, select Open Data Source or if you want to create a new one, select Create Data Source.

Creating a Data Source

The Create Data Source dialog box that appears- when you choose Create Data Source contains a list of commonly used field names under "Field Names in Header Row" box. The next step is to add field names in the data source. This can be done by selecting the field names from the Field Name in Header Row box or by adding the new ones to it. These field names can be upto 40 characters long and contain letters, numbers, and underscore (_). They cannot contain spaces and must start with a letter. The following operations on the field names can be done:

1. To delete a category from the data source, select it and choose Remove Field Name button.
2. To Add a category to the data source, type the new field name in the Field Name box and then choose Add Field Name button.
3. To change the order of field names, select a field name in the field names in Header Row box, and then click the up or down arrow at the right of the list until the field name is in the desired position.

When you finish creating the field names, choose the OK button. Word then displays the Save Data source dialog box. You save the new data source by giving a new filename to it.

Word then displays a message asking you whether you want to edit the data source or edit the main document, Choose the Edit Data Source button to type the information that varies in each version. The Data form dialog box appears. Type the information you want in each data field box and then press ENTER. To move to the next or previous data field box, press TAB or SHIFT+TAB.

Continue typing information, choosing the Add New button to start each new record. Choose the OK button in the last.

Opening a Data Source

To open an existing data source, Select Open Data Source from the Get Data drop-down list. The Open Data Source dialog box that appears works just like the File Open dialog box. Select the document you want to use and click OK. Word will open the document and return you to the Mail Merge Helper dialog box.

Step 3: One you've completed the second step-Creating a new data source or Opening an existing data source-you can complete the main document by inserting merge fields and by typing or adding information you want to be the same in each form letter.

This can be done by:

a) **Completing a form letter main document:**

Type or add any text and graphics you want to include in each letter. Then insert a merge field where you want each category of addressee information to be printed. Place the insertion point in

the document where you want to insert information from the data source, click the Insert Merge field button on the Mail Merge toolbar and then choose the appropriate merge field. Choose save from the file menu after editing the main document.

b) Merging the data source with the main document:

Before merging the main document with the data source, the following things should have been done:

1. All the addressee information in the data source should have been typed.
2. All the merge fields should have been inserted at the desired location into the main document.

To merge a data source with the main document

1. Click, the View Merged Data button on the Mail Merge toolbar while the main document is in the active window. Word displays information from the first data record in place of the merge fields in the main document text. To view information from other data records, click one of the arrow buttons on the Mail Merge toolbar, or type a record number in the Go To Record box.

5.2.3 Merge Printing Labels & Envelopes

Word's Mail Merge Helper can also be used to merge labels and envelopes. The procedure for merging labels and envelopes are very similar to those for form letters.

Printing Addresses on Envelopes

Word 6 offers the ability to print addresses on envelopes. This can be convenient for small number of envelopes; but as most laser printers require you to feed envelopes in by hand, printing large numbers of envelopes can be a slow business.

To print envelopes by using the Mail Merge command

1. Select Tools → Mail Merge to fire up the Mail Merge Helper.
2. Click the Create button to drop down a list of options and select Envelopes from this drop-down list.
3. Arrange the data source as usual. Then click the Mail Merge Helper button on the Mail Merge toolbar and under Main document, choose the Set up button. In the Envelope options dialog box that appears, make the appropriate choices for your envelopes.
 - On the Envelope options tab, click the font button in the Delivery Address box or the font button in the Return Address box to change the font in which the addresses appear. You can also adjust the position of the delivery address or return address by entering from Top and from Left measurements in their boxes.
 - On the Printing Options Tab, select the feed method and the tray to feed from.
4. Choose OK to close the dialog box.

5. Next, the Envelope Address dialog box appears. Position the insertion point in the Sample Envelope Address box. Then choose the Insert Merge Field button and choose the appropriate merge fields. Type any spaces and punctuation you want between the merge fields, and press ENTER at the end of each line. Choose the OK button to close the Envelope Address dialog box.
6. In the Mail Merge Helper dialog box choose the Edit button under main document and then choose Envelope document from the list. Word displays the envelope main document in Page Layout view. If the user Info Tab in the Option dialog box (Tools menu) has an address specified in the Mailing Address box, then that address is used as the return address.
7. Check whether your printer is ready to print envelopes. Then click the Merge To Printer button on the Mail Merge toolbar.

Printing Labels on Laser Printers

The Mail Merge Helper makes merging labels on a laser printer deal simple. You use the Mail Merge Helper to create a main document containing a table with fixed-size cells and cell spacing that match the size and position of your blank labels, then insert merge instructions in each table cell.

1. Select Tools → Mail Merge to fire up the Mail Merge Helper.
2. Click the Create button to drop down a list of options.
3. Select Mailing Labels from the drop-down list.
4. Arrange the data source as usual. Word will then invite you to set up your main document. In the Label Options dialog box that appears, make the appropriate choices for your printer and labels:
 - In the Printer Information box, select Laser or Dot Matrix as appropriate.
5. When you've chosen the labels to use, choose OK to close the dialog box.
6. The Create Labels dialog box will appear. Position the insertion point in the Sample Label box. Choose the Insert Merge field button and choose the appropriate merge fields. Type any spaces and punctuation you want between the merge fields and press ENTER at the end of each line.
7. Open the Mail Merge Helper dialog box and choose the Merge button to merge your data source with the main document. Choose whether to merge to new document or to the printer. (You can also use the Merge to New Document and Merge to Printer buttons on the Mail Merge Toolbar here).
8. Save your documents with meaningful names.

Check Your Progress

1. While using the data from other applications in the data source file,
 - i. the records must contain multiple fields
 - ii. the merge fields in the documents must match those in the data source
 - iii. you must first click the Create Data Source button
 - iv. none of the above

2. The Date and Time command
 - i. Inserts the date and time you can specify
 - ii. Automatically adds the current date and time
 - iii. Shows the date a file was created
 - iv. Shows the date a file was last revised
3. The View Merged Data button
 - i. Allows you to view all the records in the data source file
 - ii. Allows you to insert records into the main document
 - iii. Allows you to view how the form letter will appear
 - iv. Allows you to select the records to be merged
4. The Macros can be assigned to a toolbar, a menu or shortcut keys by using
 - i. the Options command in Tools menu
 - ii. the Macro command in the Tools menu
 - iii. the Customize command in, the Tools menu

5.3 SUMMARY

Mail Merge has an advanced feature of printing envelopes and labels. This feature is not present in the Mail Merge feature of WordStar Macros in Word can be assigned to menu, keyboard shortcut keys or toolbar. By this, the operation of the macro can be made faster and easier.