



# Word Processing 5N1358

## 8 Create Mail Merge and Labels

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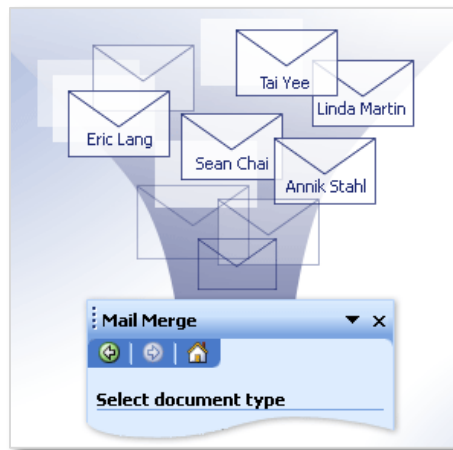
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## What is Mail Merge?

**Mail Merge** is a software function that allows the production of multiple documents (usually letters), which are similar except for small changes in data. Examples of uses of mail merged documents are phone bills, electricity bills, invitations, envelopes and letters which are sent to large groups of people.



Mail merge involves two main processes; the first is to create the data source the letter will be merged with and the second is to produce the letter or merge document. These two processes can be completed in any order.



### 1. Create Main Letter with Merge Fields

Create the document which will be used to merge with the data source. In this example a letter will be merged, however merging can be used with any type of document.

Address Line 1  
 Address Line 2  
 Address Line 3  
  
 Date

The information highlighted will be replaced with information from the data source when the document is merged.

I am delighted to inform you that school is ~~open again after~~ the summer holidays. We are looking forward to having Students Name back at Norton Hill School.

Students are expected to be back in class on Monday 1<sup>st</sup> September.

Yours truly, I

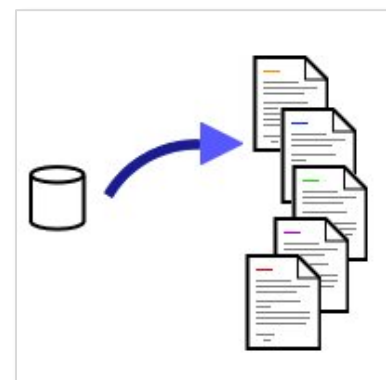
Mr. P Treanor  
 Head Teacher

The document can be edited and formatted as normal. The document can also be edited again after it has been merged before the final merging of the document.

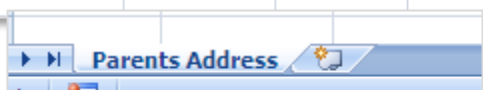
## 2. Create Data File/Data Source

A data source is another name for the information which will be merged with the document. One method of storing address and information for a mail merge is in an Excel spreadsheet however, Word Tables, Access and text files can also be used.

Create a data source using a blank Excel document. When creating the excel document it is very important to give each column a heading as this will be used when the information is added to the document later. In addition the work sheet should be given an appropriate name and all unused work sheets should be deleted. Save the Excel Document.



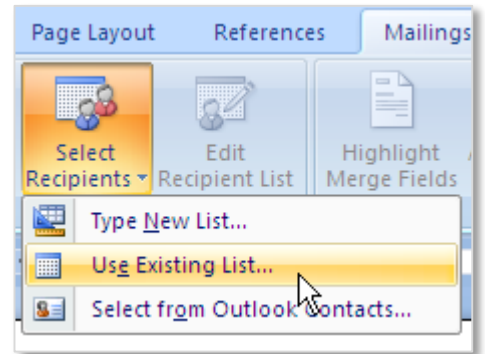
	A	B	C	D	E	F	G	H
1	<b>Title</b>	<b>First Name</b>	<b>Surname</b>	<b>Address Line 1</b>	<b>Address Line 2</b>	<b>Town</b>	<b>County</b>	<b>Student</b>
2	Mrs	Angela	Treanor	Mount View	Hill Top	Newbliss	Co. Monaghan	Mary
3	Mr	Thomas	Murphy	Green Lane	Skinnagin	Tyholland	Co. Monaghan	Tom
4	Mr	Jerry	Flynn	Boherbee	Blacksod	Ballinode	Co. Monaghan	Lucy
5	Mr	James	O'Rourke	Ive Lane	Egglish	Monaghan	Co. Monaghan	Keneth
6	Mr	Mark	McKenna	Lake View House	Derrhalla	Glaslough	Co. Monaghan	Grainne
7	Mrs	Mary	Johnston	Buttercup Drive	North Rd	Monaghan	Co. Monaghan	Sarah
8								



NOTES:

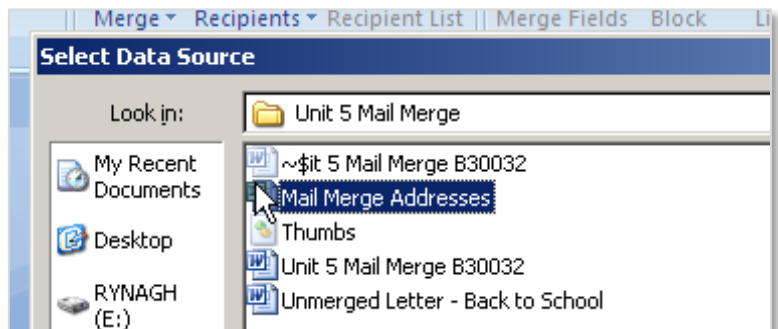
### 3. Merge Data File with Document – Import an External Data Source

To Import the External Data Source and Merge the document go to the **Mailings Tab**. In the **Start Mail Merge** group select the icon **Select Recipients**. For this example select **Use Existing List**.

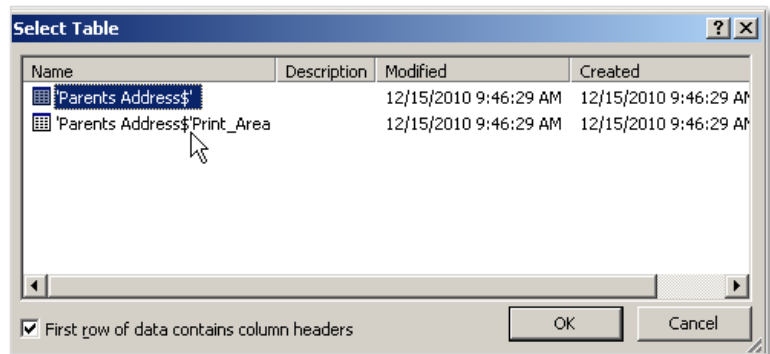


**NOTE:** If the data source has not yet been created the **Type New List** option can be used, in addition a merged document can also be created using **Outlook Contacts** (if Outlook is being used on the computer).

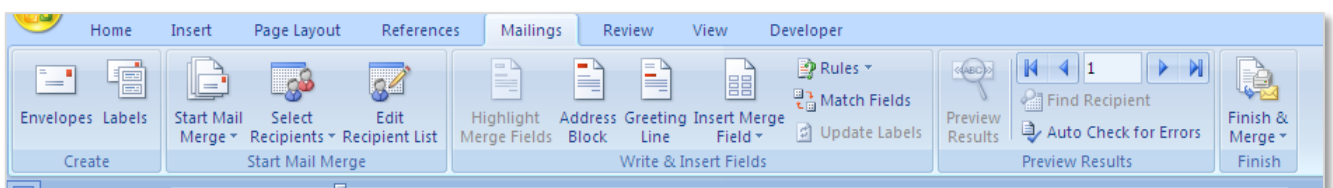
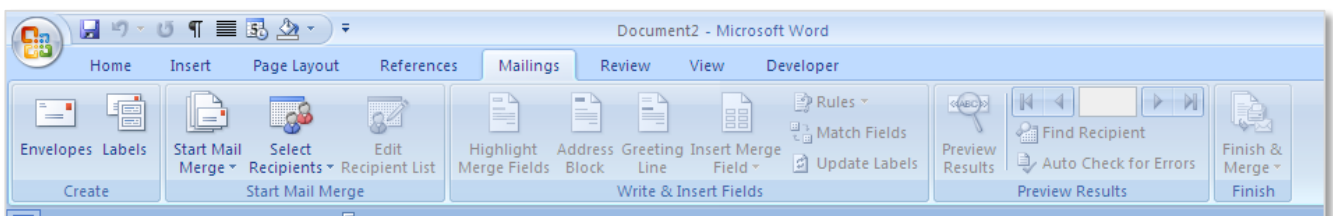
This will open the **Select Data Source** dialogue box. Browse to the Excel document which holds the data source and select **Open**.



Next select and open the table containing the data source. **NOTE:** This is why it is important to name worksheets.



Notice that the majority of options in the **Mailings** tab which were previously greyed and unavailable became accessible after the document was linked to the data source.

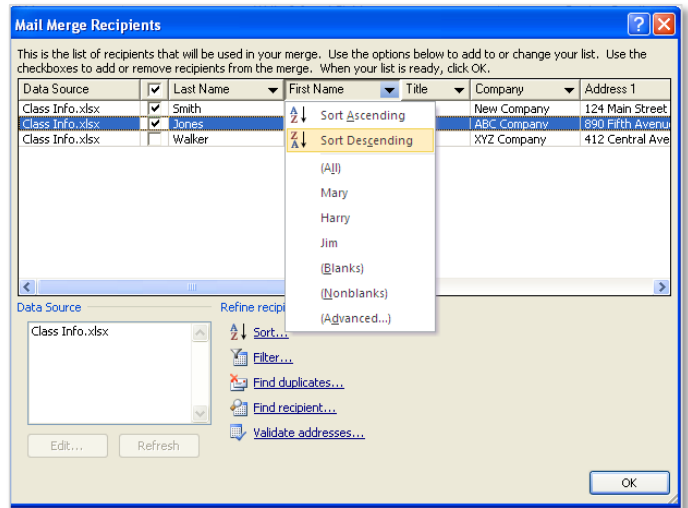


## 4. Sort Records and Apply a Filter

### Sorting Data

To use Sorts and Filters on the data source select the **Edit Recipient List** option on the **Start Mail Merge** tab. This will open the **Mail Merge Recipients** dialogue box which offers a variety of sort and filter options which can be applied to the data.

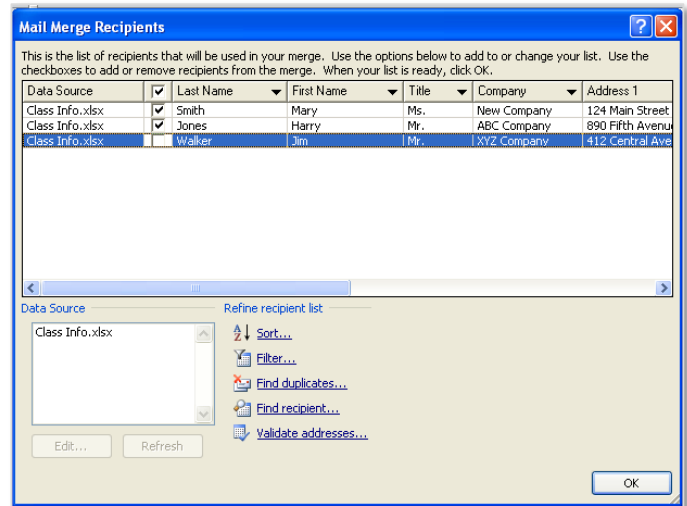
To **Sort** information **Ascending** or **Descending** select the Title required for sorting and choose the relevant option. This will ensure that all letters are merged in the sorted order chosen.



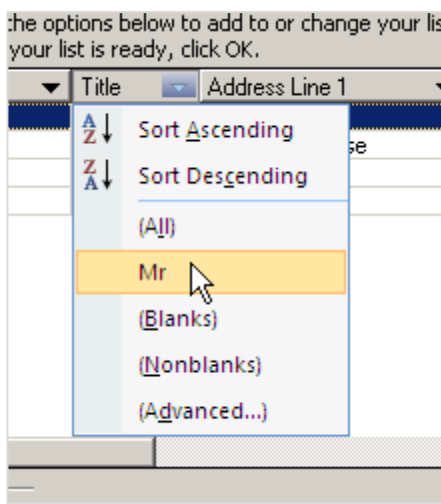
### Filtering Data

Filter data means to hide data that is not required and to only display the data that is required. To filter records which are not required toggle the checkboxes to the left of the entry this will add or remove recipients from the list and ensure that the related record does not appear in the mail merge.

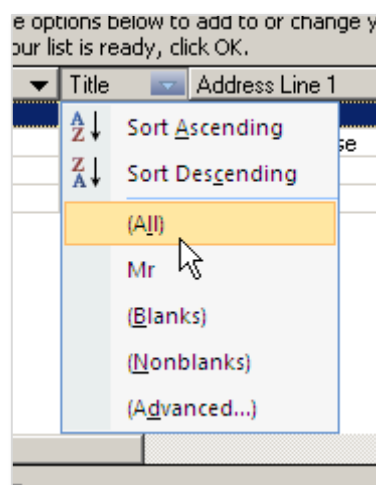
In addition Filtering can be applied by dropping down a Title and choosing an option. In the following example all people with the **Title Mr** will be included in the Mail Merge.



Apply filter showing on 'Titles' with 'Mr'

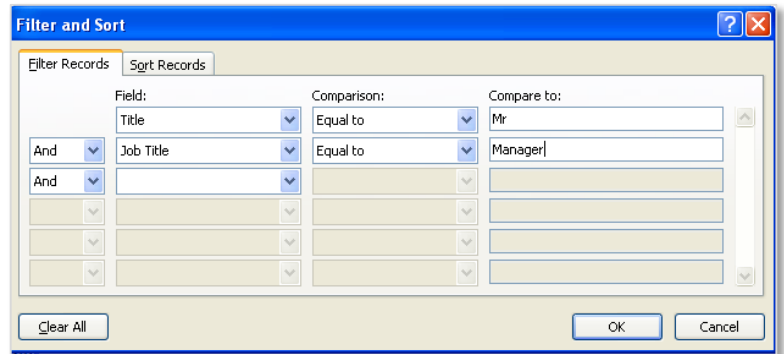


Remove filter by showing 'All' records.



To remove the filter set the drop down option back to **(All)**.

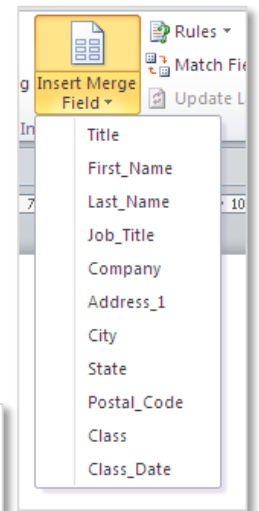
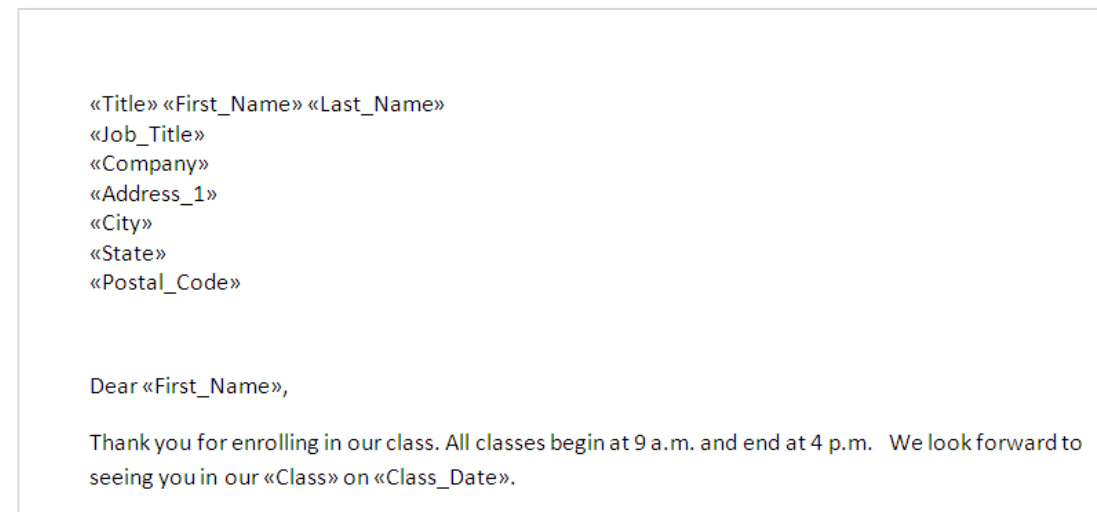
Additionally records can be filtered using the **Filter and Sort** dialogue box. Select **Filter** from the **Refine Recipient List** in the **Edit Recipient List** dialogue box and then decide how the data will be sorted. In this example the people who have the **Title Mr** and the **Job Title Manager** are the only people who will be used in the merged letter.



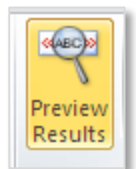
### 5. Merge the Document and the Data Source

When the correct data source and data have been selected add the correct **fields** to merge to the document. Click on the **Insert Merge Field** menu in the **Write & Insert Fields** group and click on the correct field title to add it to the document. Ensure the fields are added in the correct location with the *correct spacing and formatting*.

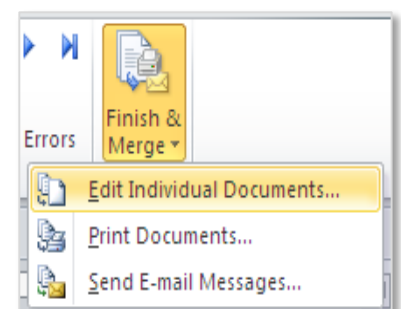
The following is an example of a letter sent to people enrolling on a night class.



When the letter has been completed with the correct fields use the **Preview Results** command button to ensure the data is being displayed correctly. This can be turned off to make any final amendments.



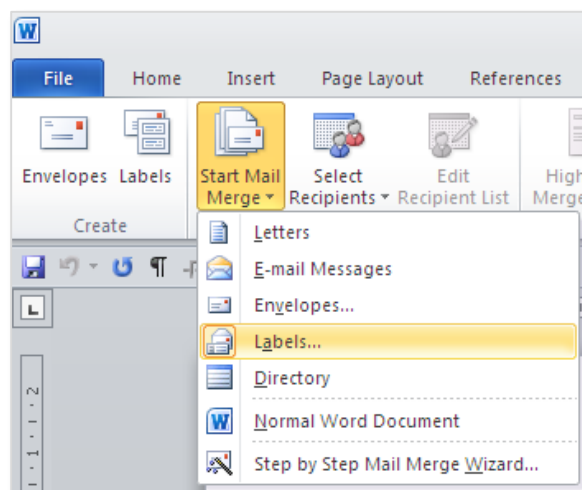
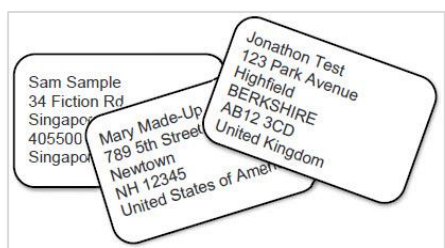
To complete the mail merge process select **Finish & Merge** menu and the **Edit Individual Documents** command button, this creates a new document with all the merged letters from the data in the data source. Each of the letters can be edited individually before printing if required.



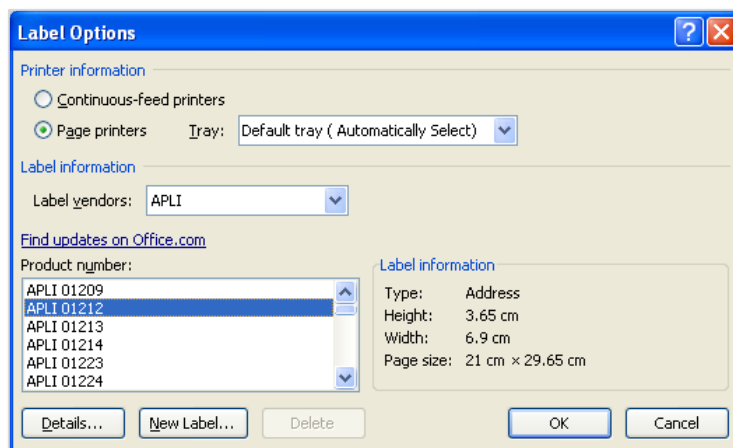
## 6. Create Address Labels

### Create Labels

To create Address Labels go to the **Mailings** tab to the **Start Mail Merge** group and choose **Labels** from the **Start Mail Merge** drop down button (**IMPORTANT** if the **Labels** command is selected from the **Create** group it will not be possible to **Update Labels** after the merge).

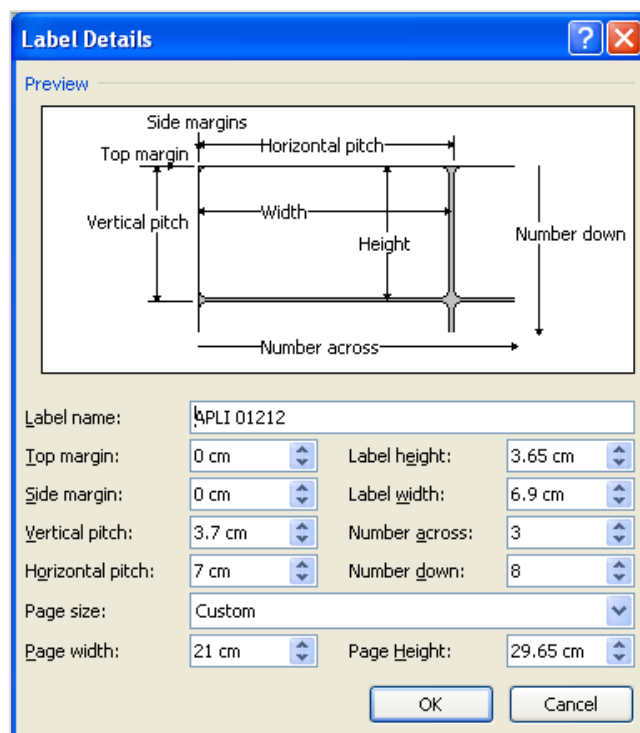


This will open the **Label Options** dialogue box from here select the correct **Label Vendor** and **Product Number** for the label set (usually found on the side of the label box). For example the **Vendor APLI** and the **Product Number APLI 01212**.



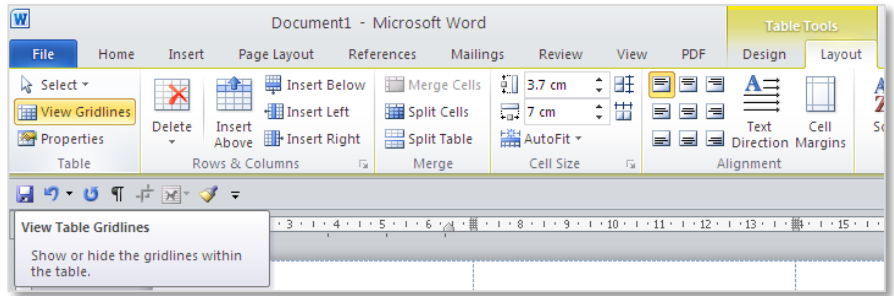
If the label required is not available it is possible to create a **New Label** in the **Create** group on the **Mailings** tab and save the dimensions of the label created. To do this measure the precise dimensions of the label and enter the details in centimetres in the **Label Details** dialogue box. Give the label an appropriate name and click ok. These dimensions can be used again for future labels.

When the correct label has been selected or created click on **OK** and a page of the labels will automatically be created with the gridlines showing.



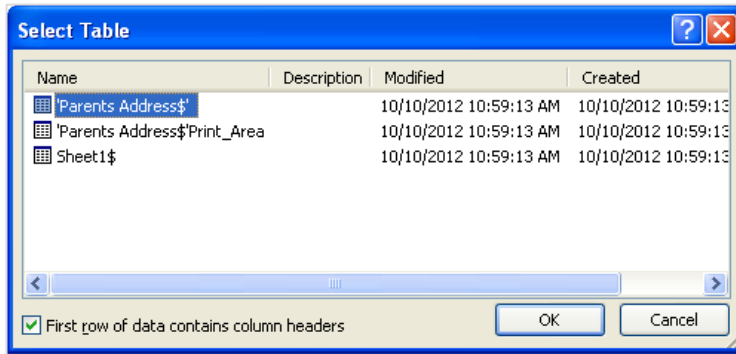
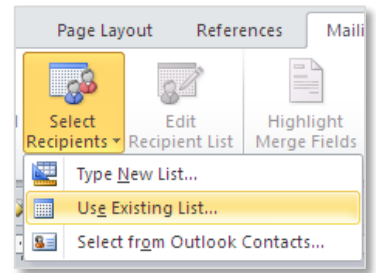
### Gridlines

If the **gridlines** are not showing click on the **Table Tools** toolbar and select **View Gridlines** button.

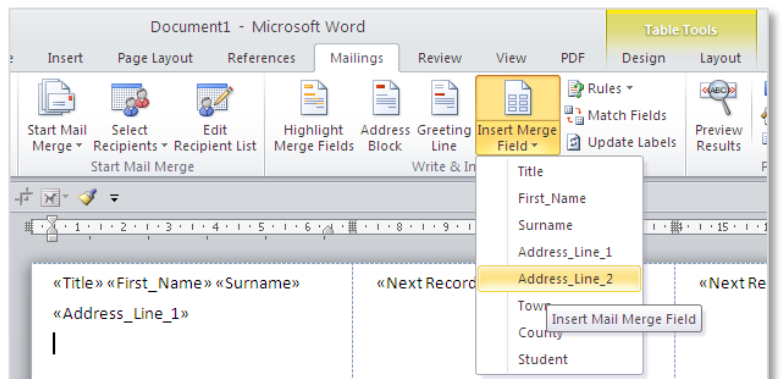


### Merge Recipients

As with the Mail Merge **Select Recipients** from an existing list if merging with a **Microsoft Excel** document. Browse to the correct document and select the correct data source from the **Select Table** dialogue box.



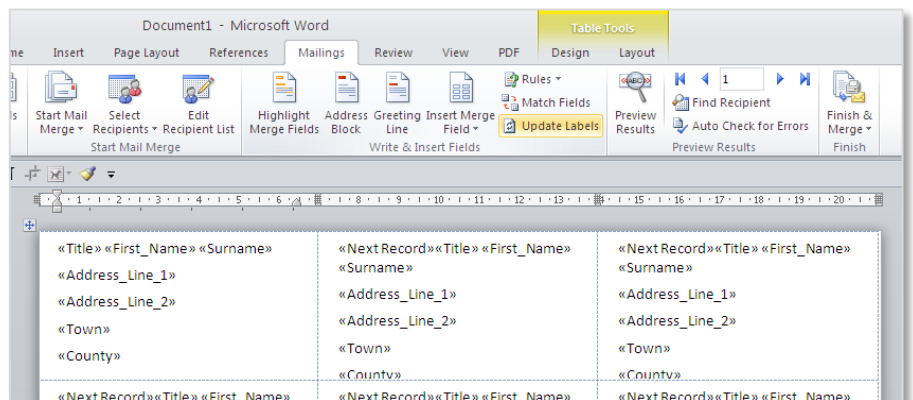
From the **Mailings** ribbon select **Insert Merge Field** and add fields as required. Ensure to set the *correct spacing and formatting* to the labels.



### Update Labels

To update all labels to match the first merged label click on **Update Labels**.

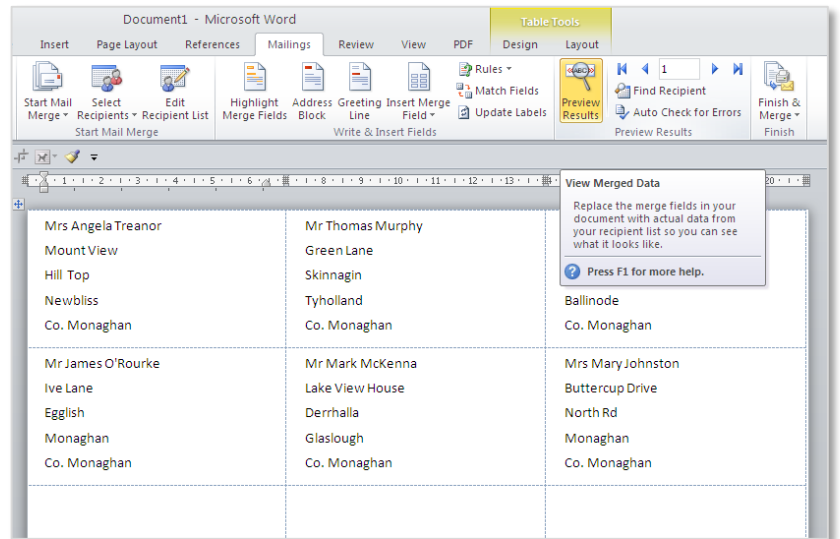
Each label will now show the unmerged data fields, separated by the <<Next Record>> data rule.





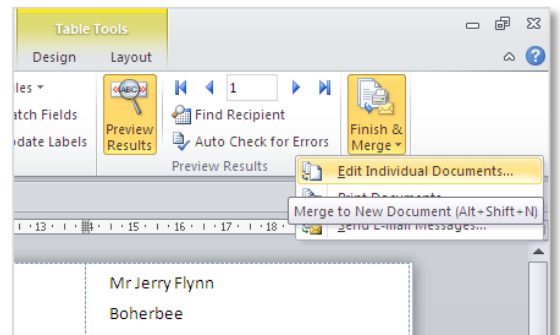
## Preview Results

To review each of the completed labels click on **Preview Results** to view the completed labels. At this point it is possible to turn off the preview and make final changes or editing to the labels.



## Finish and Merge

When the labels are completed as required click on the **Finish & Merge** button and choose **Edit Individual Documents**. This will open a new document with all of the merged labels contained in it. Save this document as the final labels, and save the unmerged document for future use.



## NOTES: