

Introduction to mail merge



**ASSIGN
BUSTER**

Aim: To make an invitation letter for the inauguration of college library and send it to five people using mail merge . letter should contain date of inauguration and time.

Input: The following is: | Title | First name | Last name | City | State | | Mr. | Himanshu | Gaur | Vasant vihar | Delhi | | Mr. | Rishab | Meena | Dwaraka | Delhi | | Mr. Rahul | Jain | Friends colony | Delhi | | Ms. | shalabh | Dutta | Saket | Delhi | | Ms. | Vishal | Kumar | Sarojni nagar | Delhi | Procedure : 1. creating the main document On the menu bar, click on Tools .

From the pull down menu , select letters & Mailings. then select Mail merge...

A task pane will appear on the right of the word document . under select document type, choose one of the following types of documents: • Letters • Envelopers Labels • Directory Click on Next : Starting document at the bottom of the task pane. 2. Selecting the starting document The two most common types of document are letters and labels. Letters: Under select starting document, select one of the three options: • Use the current document will allow you to start from the current document shown on the screen. • Start from a template will allow you to start from a ready-to-use from that can be modified.

1. click start from a template. 2. click select template... 3. On the Mail Merge tab in the select template dialog box, select the template you want, and then click OK. Start from existing document will allow you to work on an existing mail merge document. 1.

click start from the existing document. 2. In the start from existing box, select the document you want, and then click Open.. if you do not see the document, click More files.. and then click Open.

. 3. In the Open.. dialog box, locate the document you want , and then click Open. Click on Next : Select recipients at the bottom of the task pane 3.

Labels: Change the document layout: 1.

Click on Label options.... the following dialog box will appear. [pic] 2. You may choose a specific type of label by label products and product number. 3. You can adjust the height and width of the label by clicking on Details... 4. Start from existing : choosing this option if you have saved an existing label document in word format.

Click on Next: select recipients on the bottom of the task pane. Select recipients The process of selecting recipients is identical for creating letters and labels. Under Select recipients , select one of the three options: • Use an existing list will allow you to use files and addresses from a file or data base. 1. To find an already existing file , select Browse...and navigate your way to the file. 2. if your data source is an excel worksheet that has data on multiple tabs, select the tab containing the data you want.

click Ok. 3. all the entries in the data source will now appear in the Mail merge recipients window , where you can edit the list of recipients. Click Ok when finished. 4. to change the file click on Select a different list... 5. to edit the list click on edit recipients list...(data source) • Create a simple new address list will allow you to create a new contact list.

1. Under select recipients, click type a new list. 2. click Create... the following window will appear. [pic] 3. In the new address list window, type the data you want to include under enter: address information: for example titles, names and address information. You don't have to fill in every field if you want to edit the field names.

Click on Customize ... button, and the Customize address list window will appear. Add, delete or rename any field name as you want. [pic] 4. to make another entry, click New entry. 5. Repeat steps 3 and 4 until you have added all the entries you want, and then click close.

in the save address list window, type a name for the data list in the file name field and select a folder to save the list in. by default, the address list is saved in the my mail data sources folder, it is best to keep the file there since Microsoft word by default looks for data in that folder, so you won't have to navigate through files and folders to locate it 7. click save. In the Mail merge recipients window, select the recipients you want by checking the boxes next to the recipients. To sort the list, click the column heading of the item you want to sort by. To filter items in the list click the arrow next to the column heading of the item you want to filter by and select any of the following:

- Blanks display all the records in which the corresponding field is blank.
- Nonblanks display all the records in which the corresponding field contains information.

If your data source contain records that same information. And there are ten or fewer unique values in the column, you can filter by specific information. [pic] If the arrow next to any column heading is blue, that category is

screening out names. To display all the recipients again, click and blue arrows and select All. To check all names in your recipients list, click Select all. To uncheck all names, click Clear all. Click OK to return to the Mail merge wizard.

If you are creating a form letter, click on Next: write your letter. If you are creating a label, click on Next: Arrange your labels. 5. Formatting letter and label If you are creating a form letter, type the text that you want to appear in every form letter. insert merge fields where you want to merge names, address and other data from the data source(i. e recipients list) by clicking anywhere you want in the main document to insert the field. Then click on More items and insert individual field.

You may also use Address block or More items to edit the label. If you want every label to appear in the same format, click Updating all labels under Recipients. • Address block 1. click Address block... 2. in the insert address block window, select the address elements you want to include and the formats you want, and then click OK. 3. If the Match fields dialog box appears, Microsoft word may have been unable to find some of the information it needs for the address block.

click the arrow next to not matched, and then select the field from your data source that corresponds to the field required for the mail merge. Greeting line 1. click Greeting line.. 2. select the greeting line format(salutation, name format and following punctuation.) 3.

select the text you want to appear in cases where microsoft word can't interpret the recipients's name 4. click OK. 5. if the Match fields windows

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appears, word may have been unable to find some of the information it needs for the greeting line. Click the arrow next to not matched, and then select the field from your data source that corresponds to the field required for the mail merge. • More items 1. click More items.

. 2. elect one of the following: a. Address fields will allow you to select from addresss fields that will automatically map to correspondin g fields in your data source, event if the data source's field don't havethe same name as your fields b. Database fields will allow you to select from fields that always take data directly from a coloumn in a data base. 3. in the Fields window, click the field you want.

4. click Insert , and then click CLOSE. 5. If the match fields window appears, Microsoft word may have been unable to find some of the information it needs to insert the fields. Click the arrow next to not matched, and then select the field from your data source that corresponds to the field required for the mail merge. If you are creating a form letter , click next : preview yor letters If you are creating a label , click nest: preview your labels. 6.

Preview letters and labels • To preview the items in order, click the arrows under the preview your letters/labels heading. • To locate a specific item, click Find recipient list..., and then enter the criteria in the Find field. • To change the list of recipients, click Edit recipients list.... and make your changes in the Mail merge recipients window. Click on Next: complete the Mrege at the bottom of the task pane 7. complete the merge Edit individual letters/labels • Click Edit individual letters/labels... • In the Merge to new

document window, select the records you want to merge. • Click OK •

Microsoft word will create new merged document.

- To personalize individual documents , scroll to the information you want to edit, and make your changes. • Print or save the document just as you would any regular document. Print the letters/labels • If you personalized the items and the merged document is active on the file menu, click Print. If you want to print directly from the mail merge task pane, click print.. under the Merge heading. in the Merge to print window, select the options you want, and print.

8. Save the merged letters/labels Under most circumstances, you do not need to save the merged document. it is simpler and more useful to save the main document and merge it again if you need another copy. Below are examples of times when you might wish to save the merged document: • You wish to keep an archived copy of mailings, including to whom they were sent. • You have personalized individual letters or labels within the merge, and want to save those changes. If you do wish to save the merged document, collect the merged files into a single document by clicking Edit individual letters/labels. In the Merge to new document window, select one of the following: • To merge all the document, click All • To merge only the document that you see in the document window, click Current record.

- To merge a range of document, click from and then type the record numbers in the from and to boxes. Click ok. Microsoft word will open one new document that contains all the individuals letters. Save the document just as you would any regular document.