Using mail merge

Step 1: Create the main document

- 1. Open the file membership.doc from the floppy disk. Membership.doc will be used as a form letter in your mail merge.
- 2. On the Tools menu, click Mail Merge.
- 3. Under Main document, click Create, and then click Form Letters.

Mail Merge	Helper	?×
Use this ch button.	ecklist to set up a mail merge. Begin by choosing the Create	•
	Main document	
	<u>Create</u> ▼ Form Letters	
2 🖻	Mailing Labels	
_	Catalog	
2 📰	Restore to <u>N</u> ormal word Document	
<u>_</u>	Merge the data with the document Merge	
	Ca	ancel

4. Click Active Window

The active document becomes the main document.

Microsoft Word	×					
To create the mailing labels, you can use the active document window Document10 or a new document window.						
Active Window	New Main Document					

Step 2: Open the data source

1. Choose Get Data and then the Open Data Source...option in the Mail Merge Helper box.

Mail Merge	: Helper	? X
The next s Choose the	tep in setting up the mail merge is to specify a data source. e Get Data button.	
15	Main document	
	<u>Create</u> <u>E</u> dit •	
	Merge type: Form Letters Main document: Document1	
2 🖻	Data source	
	Get Data *	
	⊆reate Data Source	
2 111	Open Data Source	
<u> </u>	Use Address Book ht	
	Header Options	
		ose

2. Choose addresses.doc from the floppy disk and then click on **Open**. It contains an address list that is going to be merged with the membership.doc form letter.

Open Data Sour	ce							? ×
Look in:	退 3½ Flopp	ру (A:)	•	🗢 🔁	$\mathbf{Q} \times$	- 🛅 🖬	Tools 👻	
() History	addresses	doc						
My Documents								
Favorites								
	File <u>n</u> ame:				•	15 <u>Q</u> uery		Open
	Files of type:	All Word Docum	ents (*.doc; *	.dot; *.ht	-	5 <u>el</u> ect method		Cancel

Step 3: Insert merge fields

1. Click on Edit Main Document

Microsoft Word
Word found no merge fields in your main document. Choose the Edit Main Document button to insert merge fields into your main document.
Edit <u>M</u> ain Document

2. Enter the merge fields into the document:

Substitute the four text lines in the upper left corner

Insert Merge Field - Title FirstName LastName	Mary Smith 2 High Street Little Snoring Birmingham
Address1	With the following fields in the
Address2	with the following fields in the
City	document:
County	< <first name="">> <<lastname>></lastname></first>
PostalCode	< <address1>></address1>
	< <address2>></address2>
	< <citv>></citv>

Substitute the word "member" with <<Title>> <<LastName>>.



«Address1» «Address2» «City»

Dear «Title» «LastName»,

Your membership subscription for 2003 is now due for renewal.

Step 4: Merge the data into the main document

- If you want to see how the merged data will appear, you can preview the merged documents using this button:
- 2. In the Mail Merge Helper box, click Merge under Merge the data with the document.

Mail Merg	e Helper ? X				
The main document and data source are ready to merge. Choose the Merge button to complete the merge.					
	Main documentCreate ▼Edit ▼				
2 🖻	Main document: A:\Membership2.doc Data source				
3팩	Data: A:\address.doc				
<u> </u>	Merge the data with the document Merge Query Options Options in effect:				
	Suppress Blank Lines in Addresses Merge to new document				

3. Make sure the **Don't print blank lines when data fields are empty** button is checked.

Merge	<u>? ×</u>			
Merge to:	<u>M</u> erge			
New document Setup	Cancel			
Records to be merged	Check <u>E</u> rrors			
When merging records © Don't print blank lines when data fields are empty. © Print blank lines when data fields are empty.	Query Options			
No query options have been set.				

- 4. Save the merged document to your floppy disk as a Word document. Name the file "merged.doc"
- 5. Save all open documents and close the word processing application.